

*Phase II:  
Setting Up & Using the  
Xstamper PSN*



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## Setting Up the Xstamper PSN

Once you have completed the steps in the handout, *Phase I: Setting Up PSN*, you're ready to set the Xstamper-specific parameters. Setting parameters to communicate with Xstamper involves:

*Email PSN installation questions to [comm@eci2.com](mailto:comm@eci2.com)*

- 1 Creating an Xstamper customer record.
- 2 Setting up your Vendor database.
- 3 Setting up the communication parameters.

**Note:** *Do not* perform the steps listed here until you have executed the steps listed in the handout *Phase I: Setting Up PSN*. It is available at [www.ddms.com/support/doc/psn.htm](http://www.ddms.com/support/doc/psn.htm).

### Creating a Customer Record

*When working in any text-based screen, remember to use Caps Lock.*

Before you create the Xstamper customer record, if your account numbers are automatically assigned, you must remove your Next Customer # in the (LA) screen.

- 1 In DDMS, double-click  then . Next, double-click

Text Base Parameters. The (L) Parameters screen opens. Type **A** in the Selection Code field.

- 2 The (LA) screen opens. Type **C** in the Action field.
- 3 Tab to the Next Customer # field. Note the number in this field and save it for later. See Figure 1.

*To manually assign a customer number, the next customer number in the (LA) screen must be blank.*

**Figure 1: The (LA) Customer and A/R Parameters Screen**

```




11:27:32                (LA) Customer And A/R Parameters                01/25/05
=====
Action [C] (C=Chg,I=Inq,1=Sales,2=A/R,3=Statement,4=Jour,5=Deposit) G/L Loc [ 1 ]
=====
Next Customer #      10018  Allow Manual Input ?N  Save Changes ?N  Swap Name ?Y
Inc/Exc In (B) ?I   From ?  To ?      From ?  To ?      Add In (B) Y/N ?N  Status ?A
Inc/Exc In (G) ?I   From ?  To ?      From ?  To ?      Add In (G) Y/N ?N  Status ?A
Passwords:  Reindex ?DDMS  Release ?DDMS  Purge ?DDMS      EOM ?DDMS
            Delete ?DDMS  Credit Card ?  Mask Inquiry ?N  EOY ?DDMS
Monthly Usage From ?M To ?M  Quarterly Usage From ?Q To ?Q
Print Copies With Original Invoice Y/N ?Y      National Drop Ship Route [NDS ]
In O/E on Customer Query, Display Shipto Address instead of Billto Y/N ?Y
In Gateway Set Shipto Name to ? (A=Add. Name, C=Add. Contact, S=Shipto Contact)
Set Dept Name to ? (B=Billto Name, A=Add. Name, C=Add. Cont., S=Ship Cont.)
Keep Service Quality Statistics for Customer Status : [A] to [Z] + [ , , , , ]
Locs.to Exclude from Service Quality Statistics [ ] to [ ] + [ , , , , ]
Auto-Bill Invoices:  Print, Fax, Neither P/F/N ?N  Formats: Invoice :  Fax :
Sort Order ?N (#=Customer Nbr, N=Customer Name, R=Route, Z=Zip Code)
Only Bill Auto-Bill records that have a Quantity greater than Zero Y/N ?
Create Line Item Special from Auto-Bill Remarks Y/N ?
Advanced Customer Queries Y/N ?      Suite instead of Street on Queries Y/N ?
Show Master Shipto's if none on Dept. Y/N ?

```

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- 4 Space through the number in the Next Customer # field, and press Enter.
- 5 Press Esc twice to return to the Parameter Editor window.

In DDMS's Customer Master tab, create an Xstamper customer.

- 1 Double-click . The Customer window opens, displaying the information for the last customer selected.
- 2 Click . The boxes in the window are cleared.
- 3 Click the Account # box and type **XSTAMPER**. See Figure 2.
- 4 In the Name box, enter a name for the Xstamper customer.
- 5 When you finish, click .
- 6 If you removed the number from the Next Customer # field in the (LA) screen when you started setting up the Customer window, follow these instructions to replace it now.
  - 6.1 In the (LA) screen, type C in the Action field.
  - 6.2 Tab to the Next Customer # field. Enter the number you noted previously and press Enter.
  - 6.3 Press Esc twice to return to the Parameter Editor window.

**Figure 2:  
Creating a  
Customer  
Record**

Customer: ()

File View Help

Master Shipto/Attention Buyers/Manifest Order Entry Credit Machines

Acct #: XSTAMPER Dept: Dept. Name:

Billing Address  
Name: XSTAMPER  
Address:  
City:  
St: Zip: Route:



Salesperson 1:  
Salesperson 2:

Additional Name and Contact  
Name:  
Contact: Type ?  
Region: Area:  
Group: List:

Entry Date: 2/28/2005 Status: A Sic:  
Phone: Fax:  
E-Mail:  
Category 1: 2: 3: 4:

## Setting Up Your Vendor Database

You must set up the appropriate destination ID for Xstamper and select the features to enable.



- 1 Set up Xstamper as a vendor. If you already have an Xstamper vendor set up with the name XSTAMPER, retrieve it and go to **Step 4** to set up the Comm box.
  - 1.1 In the Vendor Master tab, click .
  - 1.2 Click the Vendor # box and type **XSTAMPER**.
  - 1.3 Click the Name box and type **XSTAMPER**.
  - 1.4 Click the Comm box's down arrow and select EDI. See Figure 3.
  - 1.5 Click .

**Figure 3: The Vendor Master Tab**

The screenshot shows a software window titled "Vendor: XSTAMPER - XSTAMPER" with a menu bar (File, View, Help) and a toolbar. The main area is divided into three tabs: "Master", "RemitTo/Settings", and "Account Status". The "Master" tab is selected and contains the following fields:

- Billing Address:** Vendor # (XSTAMPER), Name (XSTAMPER), Address (empty), City (empty), St (empty), Zip (empty), Phone (empty), Fax (empty).
- Code:** (empty), **Mach DIr:** (empty), **Comm:** (EDI - dropdown menu is open showing options: <None>, Herman Miller, Hedberg, EDI, Faxing, AllSteel).
- Minimum Order \$/#/Cu:** (empty), **Minimum Freight \$/#/Cu:** (empty), **Ship Method:** (empty).
- Contact:** (empty), **Acct #:** (empty).
- Trade Discount Information:** (empty).
- Expense G/L #:** (empty), **Sales/Purch Major:** (empty), **Use RC:** (checkbox), **P/O Detail:** (checkbox).
- Discount %:** (empty), **Terms:** (empty), **Net Terms:** (empty).

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- 2 Set PSN parameters.
  - 2.1 Click .
  - 2.2 The Supply Options dialog box opens, as shown in Figure 4. In the Location box, enter a G/L location, or accept the default of 1.
  - 2.3 In the Destination ID box, enter your Xstamper's ID exactly as follows: **XSTAMPER**
  - 2.4 From the Supported Features list, click Purchase Order.
  - 2.5 When you finish, click Exit.
- 3 Click .

### Setting Communication Parameters

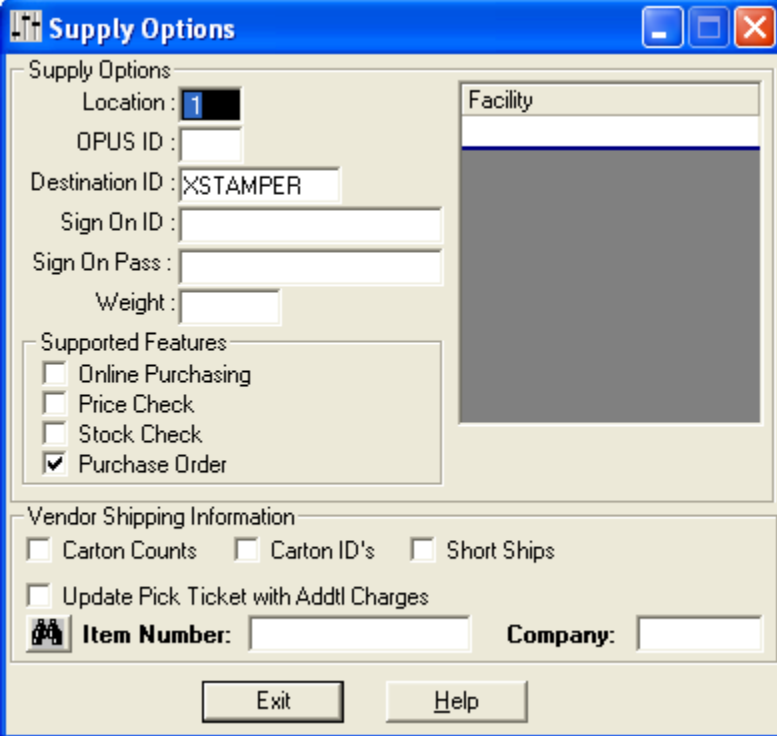
You must set up communication parameters for Xstamper.

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**Note:** Be very careful when setting communication parameters. Once you've set them, do not change them without contacting Support.


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**Figure 4: The Supply Options Dialog Box**



The screenshot shows the 'Supply Options' dialog box. The 'Location' field contains the value '1'. The 'Destination ID' field contains 'XSTAMPER'. The 'Supported Features' section has 'Purchase Order' checked. The 'Vendor Shipping Information' section has 'Update Pick Ticket with Addtl Charges' checked. The 'Item Number' and 'Company' fields are empty. The 'Exit' and 'Help' buttons are visible at the bottom.

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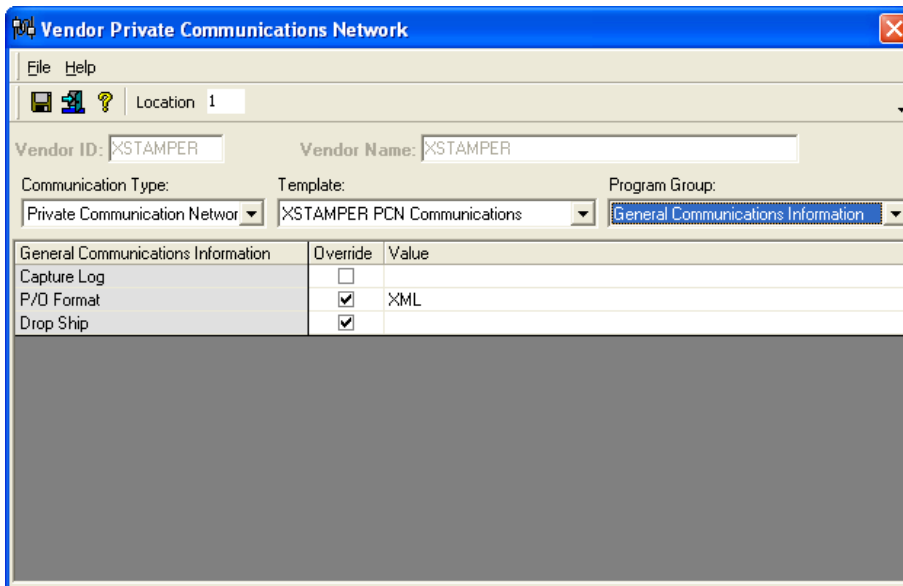
- 1 Set up the Vendor Private Communications Network dialog box.
  - 1.1 In the Vendor window, open the Vendor Private Communications Network dialog box. To do so, click View and select PCN; press Ctrl + U; or double-click .
  - 1.2 From the Communication Type drop down list, select Private Communication Network.
  - 1.3 From the Template drop down list, select Xstamper PCN Communications.
- 2 Set the general communications parameters in the Vendor Private Communications Network dialog box.
  - 2.1 From the Program Group drop down list, click General Communications Information. The available parameters are listed in the General Communication Information column.
  - 2.2 Add a default by entering the default information in the Value column. For example, to create a capture log file, enter the log file settings in the Value box.

Check the corresponding Override box to allow these parameters to be changed at the time of communication.

Set these according to the following suggestions, shown in Figure 5:

- Leave the CaptureLog value box blank. The capture log file is used only during troubleshooting.


**Figure 5: The Vendor Private Communications Network Dialog Box**



General Communications Information	Override	Value
Capture Log	<input type="checkbox"/>	
P/O Format	<input checked="" type="checkbox"/>	XML
Drop Ship	<input checked="" type="checkbox"/>	

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- Set the P/O Format value to XML.
- Set the Drop Ship value to Y.

2.3 When you finish, click .

### 3 Set the account parameters.

3.1 From the Program Group drop down list, click Account Information.

3.2 In the Account ID Value box, enter your Xstamper ID number.

3.3 When you finish, click .

### 4 Set the shipping address parameters.

4.1 From the Program Group drop down list, click Shipto Address. The available parameters are listed in the Shipto Address column.

4.2 Add a default by entering the default information in the Value column. For example, to store the name of a business, enter the business name in the Name Value box.

You must enter an email and a contact name.

Check the corresponding Override box to allow these parameters to be changed at the time of communication.

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**Note:** If the Shipto and Billto Address information is not entered, these boxes are populated with address information from the (LØ) Parameters screen.

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4.3 When you finish, click .

### 5 Set the billing address parameters.

5.1 From the Program Group drop down list, click Billto Address. The available parameters are listed in the Billto Address column.

5.2 Add a default by entering the default information in the Value box, For example, to store the name of a business, enter the business name in the Name Value box.

Check the corresponding Override box to allow these parameters to be changed at the time of communication.

5.3 When you finish, click .

## Using PSN

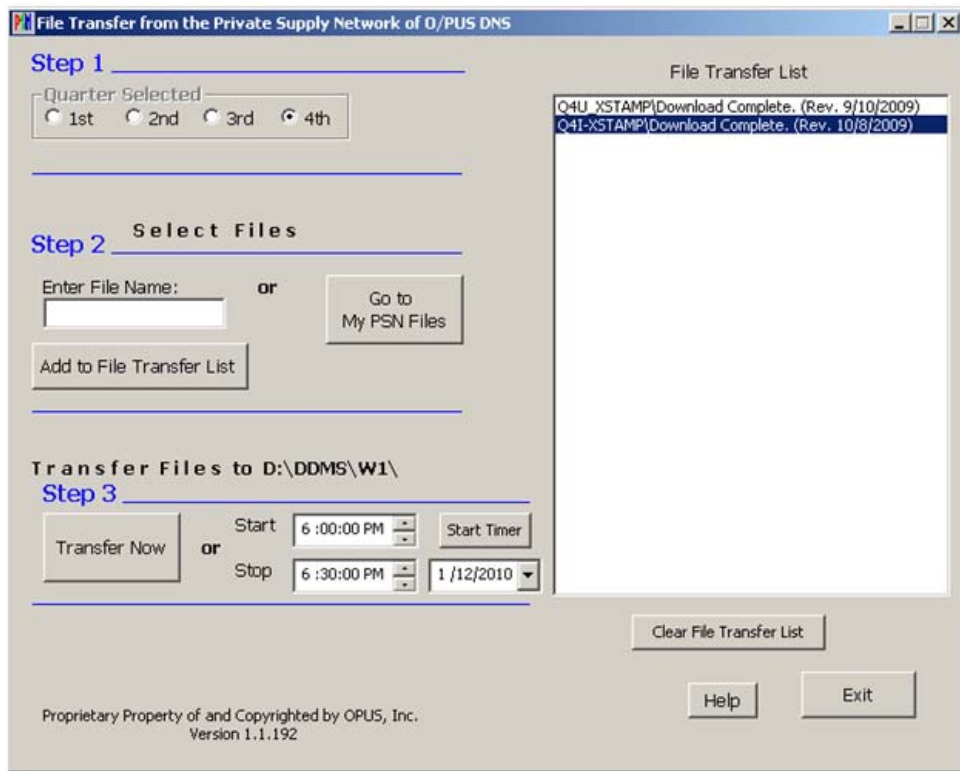
To send an online order to Xstamper, you must:

- Update your item files
- Activate Microsite and Create Order in Dealer Station or is.D-Force
- Build the P/O
- Transmit the P/O.

*If you do not have an account with Xstamper, contact Rosanne Ortega at [rortega@xstamper.com](mailto:rortega@xstamper.com) or 800-541-9719 x6203.*

## Updating Your Item Files

- 1 Download Xstamper's item file using the PSNControl program.
  - 1.1 From the Start menu, click Programs.
  - 1.2 From the Programs menu, select PSNControl to start the program. If you do not have access to the PSNControl program, contact DDMS technical support.
  - 1.3 The PSNControl program opens and defaults to the current quarter. See Figure 6. Enter the program name U\_XSTAMP and click Add to File Transfer List.



**Figure 6: The PSNControl Program**





- 2.9 At the prompt OK to Proceed, type **Y**. The number of records read and the number of items updated display. Typing **N** aborts the program.

## Activating the Xstamper Microsite in Dealer Station, is.D-Force

To activate your existing Xstamper account in the online system, contact Rosanne Ortega at [rortega@xstamper.com](mailto:rortega@xstamper.com) or 800-541-9719 x6203.

Before end users can view and order items from the Xstamper microsite, you must set up your Dealer Station and is.D-Force Admin Control Panel to grant access and allow the Xstamper Purchase Order to be correctly created on the DDMS back office system. For instructions on setting up the Microsite on Dealer Station, is D-Force see <http://www.ddms.com/Resources/Support/faq/ecommerce/dsXstamper.pdf>

## Building P/Os

After you run the Short-Buy Report (T10), you can build a P/O for Xstamper. Each P/O is transmitted separately and includes only one line item.

**Note:** When creating P/Os you need to include line item specials. These specials include detailed information that is required during transmission.

## Transmitting P/Os Online

After building a P/O for Xstamper, you can transmit it online. For instructions on transmitting P/Os using DDMS, see your online help. To transmit P/Os using text-based software:

- 1 In the (SR) Purchase Order Reports screen, type **B** in the Request field. See Figure 9.

**Figure 9:**  
Transmitting P/Os Online

```

10:36:58          (SR) Purchase Order Reports  rev. (12/16/04)          04/25/05
=====
A. Print P/O's.   P/O Form Format Y/R/B/S ?.   Past Due Y/N ?.   Outstanding Y/N ?.

B. Transmit P/O To Vendor          Send Special Codes ?   DMI          TPA
C. Receive P/O Transmission From Vendor.   TECHDATA     XSTAMPER
D. Print P/O Receipts From Vendor.   Delete File Y/N ?   ISG          EXPRESS
F. Talk To Wholesaler.              Who ?             ARLINGTON
I. Receive Electronic Invoice.       Regional Wholesaler ?



E. Backorder Reports.              Short Buy Report Y/N ?
  Keep Short Buy File for P/O's ?.   Print All ?.
M. Debit Memo Report.
P. Purge Purchase Orders.
  From File [PO-MASTER ] Vol. [W1 ]
  To File [JOUR-PO ] Vol. [W1 ]

R. Inquire or Report on Archive   Reindex Y/N ?.
S. Compare Vendor Purchases with Daisytek

P/O Numbers #..... To #.....
Vendor Nbr #..... To #.....
Request [B] Location ? 1 Printer ?P1 COMPANY ? Totals Only ?N Y/N
    
```

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**Note:** To access the (SR) Purchase Order Reports screen in DDMS, double-

click , then double-click .

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- 2** Tab to the Who field and type **N** to select Xstamper. When you select **N**, three or more trading partners may appear. However, based on the Vendor ID of XSTAMPER, P/Os are only sent to the appropriate trading partner.
  - 3** In the P/O Numbers field, enter the number of the P/O to send. To send more than one P/O, enter the number of the first P/O in the P/O Numbers field. Enter the number of the last P/O in the To # field.
  - 4** Press Enter until the Are You Sure prompt appears. Type **Y**.
  - 5** Type **C** to transmit the P/O.