



# *PurchasEdge\_Integration*



eCommerce Industries, Inc.



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## Understanding PurchasEdge

PurchasEdge is an easy-to-use program that rewards your end-users for purchasing original HP (Hewlett Packard) supplies. As a PurchasEdge member, your end-users earn points for each qualified purchase made. Once enrolled, user's receive access to the PurchasEdge web site where points can be redeemed online for free HP products, including printers, digital cameras, and PDAs. Your end-users will be able to enjoy exclusive HP promotions as well as a personalized website, quarterly statements and many special offers.

PurchasEdge has been designed specifically around you and your end-users in mind, helping you build stronger relationships and drive supply sales by rewarding your end-users with free HP products. For you and your business, PurchasEdge can provide many benefits, including:

- View detailed information about customers you have invited to join the program.
- Automatically populate your contact information on customer enrollment invitations.
- Gain access to secure content on the PurchasEdge reseller website.
- Find program information and a wide range of customizable print and online marketing tools.
- Include a personal note to your customer in the invitations you send.
- Monitor your accounts and submit invoices electronically to PurchasEdge.

There are three key features you must understand when using PurchasEdge. They include the following:

- **Reseller IDs (RID):** A RID number is a unique PurchasEdge identification code assigned to you. A RID number acts as your identifier within the DDMS system. It is used to directly link to the end user's PID number (described below). You can have multiple RID numbers for each location. When you transmit the invoices to PurchasEdge, the system submits the data for each separate location. *Before you can participate in the program, you must obtain a RID directly from PurchasEdge.* For details, see the heading **Obtaining a RID Number from PurchasEdge.**
- **PurchasEdge IDs (PID):** A PID number is a PurchasEdge member (end-user's) identification number. This is used as the end-user's unique identifier. The PID number is linked to your RID number in the DDMS system. When invoices are submitted, they include

both the RID and PID number from the DDMS database. This link between the end-user's PID number and your RID number enables DDMS to transmit consolidated Electronic Invoice Submissions (described below). *Before an end-user can participate in the program, he must obtain a PID directly from PurchasEdge.*

- **Electronic Invoice Submission (EIS):** This is the process by which the invoice data is sent on behalf of you and your end-users to PurchasEdge. To do this, you install a proc file (sometimes called a procedure or batch file) that automatically transmits the information. When you install the proc file, you can specify to send this data on the first day of each week, or each month, for example. Once the proc file is installed, the invoice information is automatically sent from DDMS to PurchasEdge. For details, see the heading **Installing the PurchasEdge Proc File**.

If necessary, we've also created a program that allows you to manually transmit the data to PurchasEdge. You do this using the [B4] Execute Program function in the (Z) System Utilities screen. For details, see **Manually Transmitting the Data to PurchasEdge**.

## Setting Up PurchasEdge

Before you can use PurchasEdge, you must:

- Be using DDMS software version 7.12.40 or 8.10.0 or higher.
- Obtain your RID number from PurchasEdge.
- Add the HP vendor.
- Set up vendor supply options.
- Install a Proc file to send the invoice data to PurchasEdge. (You can also manually transmit the invoice data if necessary.)
- Update your end-users in mass on your administrative web site to use PurchasEdge.
- Disable PurchasEdge on your administrative web site for only those end-users who will not use the feature.
- Obtain a unique PID number for each end-user.
- Enter the unique PID number for each end-user in the Ensite Pro Customer database.

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**Note:** In addition, before you can use PurchasEdge you must be signed up to use PSN. For more details, see the *Phase I: Setting Up PSN* handout at our web site: <http://www.ddms.com/Resources/Doc/PSN/psn.pdf>

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## Obtaining a RID Number from PurchasEdge

Getting started is easy. The first step is to obtain your unique RID (reseller ID) number. You can have multiple RID numbers for each location.

- 1 Go to the following web site: <http://www.eci2.com/customers/hp/purchasedge.asp>

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**Note:** You must request and use the RID number you obtain from the HP PurchasEdge Reseller page. If you previously had a RID number, [www.purchasedge.com](http://www.purchasedge.com) merges the old account information with the new RID account you receive during this process.

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- 2 The Register as an HP PurchasEdge Reseller page opens. See Figure 1. You use this page to obtain your RID number. Enter information according to the following:
  - **Company Name:** Enter your company name, ABC Company, for example.
  - **Address 1/Address 2:** Enter your company's address, including suite number.
  - **City:** Enter the city where your company is located.

The screenshot shows the 'Register as an HP PurchasEdge Reseller' page. At the top, there is a navigation bar with 'Contact Us' and 'Advanced Search' links. Below this is a banner with the eci2 logo and the tagline 'Power to Compete'. The main content area is titled 'Register as an HP PurchasEdge Reseller' and includes a 'Verification Required' badge. The page contains a form titled 'PurchasEdge Reseller Application' with fields for 'Company Name', 'Address 1', 'Address 2', 'City', and 'State /Province'. A sidebar on the left lists various support and training options.

**Figure 1: The Register as an HP PurchasEdge Reseller Page**

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- **State/Province:** Enter the state or province where your company is located.
  - **Zip/Postal Code:** Enter your five-digit zip code where your company is located or the seven-digit postal code your company uses.
  - **Country:** Click the down arrow in this box to select the country where your company is located.
  - **Email Address:** Enter the email address where you want your RID number sent. If John Smith should receive the RID number within your company, you would enter John Smith's email address, Johnsmith@ddms.com, for example.
  - **Phone Number:** Enter the phone number of the individual who will be contacted for PurchasEdge information.
  - **Currency:** Click the down arrow in this box to select the currency type you want to use.
- 3 When finished, click Register.
  - 4 The system displays the Thank You Confirmation page, as shown in Figure 2. This page lists your RID number. The RID number is also immediately emailed to the individual's email address you specified in the Email Address box.
  - 5 You must repeat this process for each location you have. Each location can have a unique RID.
  - 6 Once you have your RID number, you must enter the number in the Vendor database.

**Figure 2: The Confirmation Thank You Page**



## Adding the HP Vendor in the Vendor Window

If you are using graphical software, before you can use PurchasEdge, you must add the HP vendor. The system uses the HPPE vendor account number to match on PurchasEdge information. If you are using text-based software, see the heading **Adding the HP Vendor in the (C) Screen**.

- 1 From the Ensite Pro Master Menu, double-click  .
- 2 Click  . The cursor moves to the Vendor # box.
- 3 In the Vendor # box, type **HPPE**.
- 4 In the Name box, type **HP PURCHASEEDGE**. These are the only boxes you need to complete to add the HP vendor record.
- 5 Click  . See Figure 3.

## Entering the RID Number in the Vendor Window



After you have saved your HP vendor, you must enter your RID number. If you are using text-based software, see the heading **Entering the RID Number in the (CS) Screen**.

- 1 From the Ensite Pro Master Menu, double-click  .

**Figure 3:  
Adding the HP  
Vendor Record**

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*You use the Sign On ID box to enter the RID number you received from PurchasEdge.*

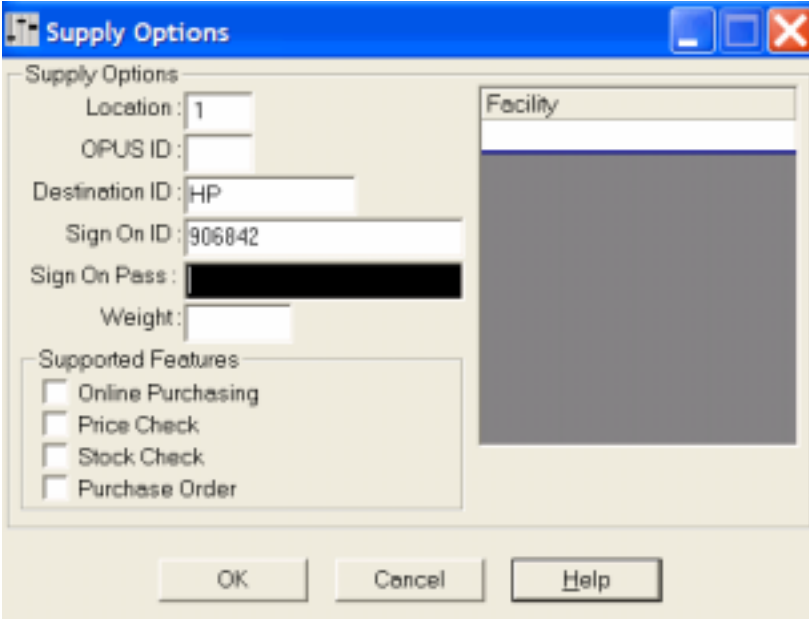
- 2 Click  or type **Ctrl + P**. The Vendor Supply Options dialog box opens.
- 3 The Location box defaults to location 1. Enter the general ledger location for PurchasEdge information.
- 4 Click the Destination ID box and type **HP**.
- 5 Click the Sign On ID box and enter the RID number you received from PurchasEdge. Be sure to enter the number exactly as you received it. You can enter up to six numeric characters. PurchasEdge uses only numeric characters. *Do not enter more than six characters, and do not enter alpha characters, A, B, C and so on.* See Figure 4.
- 6 Click OK.
- 7 In the Vendor Master tab, click  to save your changes. Go to the heading **Installing the PurchasEdge Proc File**.

### Adding the HP Vendor in the (C) Screen

If you are using text-based software, you must add the HP vendor in the (C) Vendor Master screen.

- 1 Go to the (C) screen and select the [A] Add action code.
- 2 The cursor moves to the Vendor # field. Type **HPPE**. Press Tab.

**Figure 4:**  
Entering the  
RID Number



The screenshot shows a 'Supply Options' dialog box with the following fields and values:

- Location: 1
- OPUS ID: (empty)
- Destination ID: HP
- Sign On ID: 906842
- Sign On Pass: (masked with black)
- Weight: (empty)
- Facility: (empty)

The 'Supported Features' section contains the following unchecked checkboxes:

- Online Purchasing
- Price Check
- Stock Check
- Purchase Order

Buttons at the bottom: OK, Cancel, Help.

- 3 The cursor moves to the Name field, type **HP PURCHASEEDGE**. See Figure 5. Press Tab.
- 4 The Unique Record OK to Add message appears and the cursor returns to the Vendor # box. Press Enter.
- 5 After entering the vendor name, the cursor moves to the Suite field. The vendor account number and name are the only information you must enter to create a vendor record.
- 6 Press Enter until the cursor moves through the screen and returns to the Vendor # field. If you press Esc before doing so, the vendor record is not saved.

### Entering the RID Number in the (CS) Screen

If you are using text-based software, you must enter your RID number in the (CS) Vendor Private Supply Network screen.

- 1 Go to the (C) screen and select the [S] PSN action code. The (CS) screen opens.
- 2 Select the [C] action code.
- 3 The cursor moves to the Vendor # field. Type **HPPE**. Press Tab.
- 4 The system displays the HP PURCHASEEDGE vendor record, along with the Correct Record prompt. Press Enter or type Y.
- 5 The cursor moves to the Destination ID field. Type **HP**. Press Tab.

**Figure 5:  
Adding the  
Vendor Record  
in the (C) Screen**

```

14:45:38                (C) Vendor Master Rev. (09/20/03)                04/11/06
ACTION [A] =====
      A=Add, C=Chg, I=Inq, D=Del, R=Reindex, P=InvParm, V=VenAlias, E=ElecPur, S=PSN
=====
Vendor#HPPE           Code :   G/L #   -                REMITTANCE ADDRESS
Name :HP PURCHASEEDGE                Name :.....
Suite :                               Suite :.....
Addr :                               Addr :.....
City :                               City :.....
State :   Zip #   [   ]   Comm ?   State :.. Zip #..... [....]
Phone #   -   -   Suppress Ck Detail ?   Phone #.....
Contact [   ]                               Contact [.....]
Acct#                               Fax#   -   -   ===== TRADE DISCOUNT INFORMATION =====
Recv Days #   Max Lines #   Auto 850 ?   [.....]
Discount %   Eco.Cont.[   ]   MAC [   ]   [.....]
Net Terms ?   Terms ?   Cont.[   ] To [   ]   [.....]
===== CURRENT ACCOUNT STATUS =====   [.....]
Lead Days #... Average #... Hits #...   G/L Amt $..... #..-...-.. Day :..
Last: Order :../... Payment :../...   G/L Amt $..... #..-...-.. Day :..
Balance $..... Mtd $.....   G/L Amt $..... #..-...-.. Day :..
Ytd $..... Last $.....   From Date :../... To :../...
Last P/O #..... Debit #.....   P/O #.....
=====
UNIQUE RECORD - OK TO ADD
    
```

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*You use the Vendor ID box to enter the RID number you received from PurchasEdge.*

- 6 The cursor moves to the Vendor ID box. In this box, enter the RID number you received from PurchasEdge. Be sure to enter the number exactly as you received it from PurchasEdge. You can enter up to six numeric characters in this box. PurchasEdge uses only numeric characters. Do not enter alpha characters, A, B, C and so on. See Figure 6.
- 7 Press Tab. The cursor moves to the Vendor Password field. No password is required for the HP PurchasEdge program.
- 8 Press Enter. The system displays the next vendor record, along with the Correct Record prompt. Press Esc to exit the (CS) window.

## Installing the PurchasEdge Proc File

By setting up a proc file for use with PurchasEdge, you can specify when you want the information sent to PurchasEdge, once a month at 5:00 am, for example. This file contains the following data, the RID (reseller identification) number, the PID (PurchasEdge identification) number, the invoice number and date, HP part number and quantity, and unit price.

**Note:** The proc file loads into DDMS as DDMS-HPPE\_XMIT. Before installing the proc file, you must rename it. Rename the files from DDMS-HPPE\_XMIT to -HPPE\_XMIT. To do so, scroll to the location on your hard drive where the DDMS SR files are stored, C:\DDMS\SR, for example. Open the SR folder. Rename all three DDMS-HPPE\_XMIT files to -HPPE\_XMIT. When you finish, you should have the following three files in your SR folder: -HPPE\_XMIT.CDX, -HPPE\_XMIT.DBF, and -HPPE\_XMIT.KEY.

**Figure 6:**  
Entering the  
RID Number

```
14:55:43          (CS) Vendor Private Supply Network Rev. (09/20/03)          04/11/06
=====
ACTION [C]  C=Change, I=Inquire
=====
Vendor#HPPE          HP PURCHASEEDGE          Code :A          G/L #  -
Destination Id      #HP
Vendor Id           [906842          ]
Vendor Password [          ]

                                     Facility Codes

      PSN Options          [          ] [          ] [          ] [          ] [          ]
      Price Checks ?N      [          ] [          ] [          ] [          ] [          ]
      Stock Checks ?N      [          ] [          ] [          ] [          ] [          ]
      P/O's ?N            [          ] [          ] [          ] [          ] [          ]
      P/O's thru O/E ?N    [          ] [          ] [          ] [          ] [          ]
      Maximum P/O Weight # [          ] [          ] [          ] [          ] [          ]

=====
CORRECT RECORD Y/N ?Y
```

- 1 From the DDMS Master Menu, go to the (Z) screen.
- 2 Select the [E7] Activities Scheduler action code. The Program Launcher screen opens, as shown in Figure 7.
- 3 The cursor moves to the Enter Action field. Type A to add a new event.
- 4 In the Active field, press Enter to select Active.
- 5 In the Day of Week field, press Enter to select None.
- 6 In the Month field, press Tab to move the cursor to the Wild option. When Wild is selected, press Enter.
- 7 When the cursor moves to the Day field, specify the day of the month you want to send the HP PurchasEdge information. For example, if you want to send the information on the first day of each month, you would type 01. To send the information on the 10th day of each month, you would type 10.
- 8 The cursor moves to the Hour field. Press Tab to select the hour of the day you want to send this information to HP PurchasEdge. After you select the hour, press Enter. For example, if you want to send the information at 5:00 am, you would tab to 5 and press Enter.
- 9 The cursor moves to the Minute field. Press Tab to select the minute you want to send this information to HP PurchasEdge. After you select the minute, press Enter.
- 10 In the AM or PM field, specify whether you want to send the information for the hour and minute you specified in the A.M. or P.M. Press Tab to move the cursor to the PM field.

*If you select PM, the system displays the hour and minutes using military time — 1:00 pm is shown as 13:00 hours.*

**Figure 7: The Program Launcher Screen**

```

+-----+-----+-----+-----+-----+-----+-----+-----+-----+
|                                     | Program Launcher |-----+
|                                     | PGD Program and Procedure File Launch Utility - Version 1.04
|                                     | Tuesday April 11, 2006 04:39:14 pm
+-----+-----+-----+-----+-----+-----+-----+-----+-----+
| # | A | DAY | DATE | TIME | DV | PROGRAM | DESCRIPTION | LAUNCHED |
+-----+-----+-----+-----+-----+-----+-----+-----+-----+
| 1 |  |  |  |  |  |  |  |  |
| 2 |  |  |  |  |  |  |  |  |
| 3 |  |  |  |  |  |  |  |  |
| 4 |  |  |  |  |  |  |  |  |
| 5 |  |  |  |  |  |  |  |  |
| 6 |  |  |  |  |  |  |  |  |
| 7 |  |  |  |  |  |  |  |  |
| 8 |  |  |  |  |  |  |  |  |
| 9 |  |  |  |  |  |  |  |  |
|10 |  |  |  |  |  |  |  |  |
|11 |  |  |  |  |  |  |  |  |
|12 |  |  |  |  |  |  |  |  |
|13 |  |  |  |  |  |  |  |  |
|14 |  |  |  |  |  |  |  |  |
+-----+-----+-----+-----+-----+-----+-----+-----+-----+
|                                     | Action |-----+
| A> ADD Event
| C> CHANGE Event
| D> DELETE Event
| L> LAUNCH Now
| M> MONITOR Event
| S> SUSPEND a day/date
| X> Or <ESC> to exit
+-----+-----+-----+-----+-----+-----+-----+-----+-----+
| Enter Action : [M]
+-----+-----+-----+-----+-----+-----+-----+-----+-----+

```



- 5 Scroll down to view the User Settings section of the dialog box. In the Display HP PurchasEdge box, click Yes, as shown in Figure 9.
- 6 Scroll to the bottom of the page and click Submit Changes.
- 7 The Confirm Your Changes dialog box opens so you can view the change information. Click Submit Changes.

## Using the Default User Settings Page to Enable PurchasEdge

In addition to mass updating your users, you can use the Default User Settings web page to enable PurchasEdge for all your end-users.

- 1 Go to your Administrative Home Page.
- 2 Click Default User Settings. The Default User Settings web page opens.
- 3 Scroll down the page until you see the Display HP PurchasEdge option.

User Settings		
Display Machine Matching Tool:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Display Zip Order:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Display HP Printing Supplies Site:	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<input type="checkbox"/> No Change
View Multi-Department History:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Super User:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Edit Budgets:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Display Available Budget:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Override Budget Hold:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Override Credit Limit Hold:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Override Past Due Hold:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
View Held Orders:	<input type="checkbox"/> View orders only for this username <input type="checkbox"/> View all orders for this user's department <input type="checkbox"/> View all orders for this user's account number	<input checked="" type="radio"/> No Change
Order From Catalog:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Display Today's Specials:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Display HP PurchasEdge:	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> No Change
Order From Quick Order:	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Order From Contract (Laundry List):	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input checked="" type="radio"/> No Change
Laundry List:	<input type="text"/>	<input checked="" type="checkbox"/> No Change

**Figure 9: Setting the Display HP PurchasEdge Feature to Yes in the Update Users in Mass Web Page**

- 4 Set this option to Yes, as shown in Figure 10.
- 5 Scroll to the bottom of the page and click Update.

## Disabling PurchasEdge For Specific End-Users

After you update your end-users in mass to use PurchasEdge, you can return later and disable it for only those end-users who will not be using the feature.

- 1 Click User Accounts.
- 2 In the Search for Users dialog box, retrieve the end-user who will not be using the PurchasEdge feature.
- 3 After you select the user, the User Accounts dialog box opens. Scroll down to the User Settings section of the dialog box.
- 4 In the Display HP PurchasEdge box, click No, as shown in Figure 11. Clicking No in this box disables this feature for this specific user only.
- 5 Scroll to the bottom of the page and click Save.
- 6 You must repeat these steps for each end-user who will not be using PurchasEdge.

**Figure 10:**  
Setting the  
Display HP  
PurchasEdge  
Feature to Yes in  
the Default User  
Settings Web  
Page

Non-Contract Items Require Approval:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Super User:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow Super User to set Non Contract Items Require Approval:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow Super User to set Decimal Places in Pricing:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Order From Catalog:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display Today's Specials:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display HP Purchasedge:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Order From Quick Order:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Order History:	<input checked="" type="radio"/> Yes <input type="radio"/> No
View List Prices:	<input checked="" type="radio"/> Yes <input type="radio"/> No
View Customer Prices:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Identify Contract Items:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Modify Shipping Address:	<input checked="" type="radio"/> Yes <input type="radio"/> No

## Obtaining an End-User PID Number from PurchasEdge

The next step requires your end-users to obtain a PID number from PurchasEdge. Each end-user who wants to use PurchasEdge must have a unique PID number.

- 1 Go to the end-user web site.
- 2 Click the Update My Info link.
- 3 The HP Account dialog box opens. To Obtain a PID, click the Need an HP PurchasEdge ID link, as shown in Figure 12.
- 4 After you click the HP PurchasEdge ID option, the system opens a separate window: the PurchasEdge Member Enrollment Form, as shown in Figure 13. Click each box and enter the information. When finished, click Submit.

Max Authorized Monthly Dollars:	<input type="text" value="0"/>
Non-Contract Items Require Approval	<input type="radio"/> Yes <input checked="" type="radio"/> No
Super User:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow Super User to set Non Contract Items Require Approval	<input type="radio"/> Yes <input checked="" type="radio"/> No
Allow Super User to set Decimal Places in Pricing:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Order From Catalog:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display Today's Specials:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Display HP PurchasEdge:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Order From Quick Order:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Order History:	<input checked="" type="radio"/> Yes <input type="radio"/> No
View List Prices:	<input checked="" type="radio"/> Yes <input type="radio"/> No
View Customer Prices:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Identify Contract Items:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Modify Shipping Address:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Decimal Places in Pricing:	<input checked="" type="radio"/> 2 <input type="radio"/> 3 <input type="radio"/> 4
Quick Approve Orders:	<input checked="" type="radio"/> Yes <input type="radio"/> No

**Figure 11:**  
Disabling the  
HP PurchasEdge  
Feature for a  
Specific User

- 5 Your PID will be emailed to the email account you specified. Once the PID is received, the end-user can return to the Update My Info page to specify personal information, including the new PID number in the HP PurchasEdge ID box. If this is done, the system automatically updates DDMS with the information the end-user specified, including the PID number, stored in the Customer Order Entry tab's PID box. For details, see the heading **Entering or Changing PID Information on the End-User Site**.

You can also enter the end-user's PID number yourself in the Customer database. For details on manually entering the end-user's PID number in the graphical Customer window, see the heading **Manually Entering the End-User's PID Number in the Customer Window**. For details on entering the end-user's PID number in the text-based (A) screen, see the heading **Manually Entering the End-User's PID Number in the (A) Screen**.

**Figure 12:**  
Selecting the  
Need an HP  
PurchasEdge ID  
Option

My Account  
HP ACCOUNT

Feel free to modify your user account. Please note that required fields are in **bold**. All other fields are optional. Thank you.

**YOUR INFORMATION**

**First Name**   
**Last Name**   
**Email**   
Phone Number  Ext.   
**Username**   
**Password**   
(Used for accessing the system. NO SPACES)  
**Confirm Password**   
**HP PurchasEdge ID**   
 Need an HP PurchasEdge ID?

## Entering or Changing the PID Information on the End-User Site

After end-users receive the PID number, they can access their web site and specify their information. They do this using the Update My Info page. When they enter or change the PID number using this page, the Ensite Pro Customer Order Entry tab is automatically updated with the information they specified.

- 1 Go to the end-user web site.
- 2 Click the Update My Info link.
- 3 The HP Account dialog box opens. Enter information according to the following:
  - **First Name/Last Name:** In these boxes, enter the first and last name of the individual within your company who is responsible for the HP PurchasEdge feature.
  - **Email Address:** Enter the email address of the individual within your company who is responsible for the HP PurchasEdge feature. If John Smith is responsible, you would enter John Smith's email address, johnsmith@ddms.com, for example.



### PurchasEdge - member enrollment form

To enroll in PurchasEdge, please complete the information below. All fields are required unless otherwise noted. Resellers are not eligible to enroll in PurchasEdge.  
Please review the program terms and conditions for specific membership requirements.



#### Member enrollment form

All fields are required unless otherwise noted.

First name	<input type="text"/>
Last name	<input type="text"/>
Title	<input type="text"/>
Company	<input type="text"/>
Company Phone	<input type="text"/>
Address	<input type="text"/>
Address2 (optional)	<input type="text"/>
Country	United States <input type="text"/>
City	<input type="text"/>
State/Province	Select <input type="text"/>

- » PurchasEdge
- » **Enroll**
- » FAQs
- » Free product menu
- » Qualifying supplies
- » Articles and resources
- » Points Calculator
- » Terms and conditions
- » Contact us
- » **Members sign-in**

#### Customer requirements

To participate in PurchasEdge, your company must meet the following requirements:

- Spend \$1,000 USD (\$1,150, 1P CDn) or more each year on select HP LaserJet or inkjet print cartridges, HP paper, and HP

**Figure 13: The PurchasEdge Member Enrollment Form**

## PurchasEdge\_Integration

Whenever the end-user updates the Update My Info page with a different PID number, the system automatically updates the PID box in the Customer Order Entry tab.

- **Phone Number/Ext:** Enter the phone number and phone number extension of the individual who will be contacted regarding PurchasEdge information.
- **User Name:** This box displays your user name and cannot be changed. It is for display only.
- **Password:** Use this box to specify a password restricting access to the PurchasEdge feature. You must specify a password in this box. If you leave this box blank, the system prompts you that a password must be entered.
- **Confirm Password:** Use this box to confirm the password you entered in the Password box. To confirm the password, enter the password exactly as you entered it in the Password box.
- **HP PurchasEdge ID:** You can use this box to enter your PID number. Enter the number exactly as you received it from PurchasEdge. You can enter up to six numeric characters in this box. PurchasEdge uses only numeric characters. *Do not enter more than six characters, and do not enter alpha characters, A, B, C and so on.*

4 Click Finished.





Figure 14:  
Entering the  
PID Number in  
the Customer  
Window

The screenshot shows a software window titled "Customer: HP ACCT ( ) HP ACCOUNT". The window has a menu bar with "File", "View", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into several tabs: "Master", "Ship to/Attention", "Buyers/Manifest", "Order Entry", "Credit", and "Machines". The "Order Entry" tab is currently selected. In the "Order Entry" section, there are several input fields and checkboxes. The "PID:" field is highlighted in blue and contains the value "158800". Other fields include "Cross Reference:", "Additional Volume Discount Plan:", "Statement Exempt?", "PrePay?", "Exempt from Min. Order Charges", "Skip Card Validation", "Two Decimal Place Pricing", "Order Entry Setting:", "Location: 1", "Taxable?", "District:", "Remote ID:", "Laundry List ID:", "Status O/E:", "B/O's Allowed?", "Substitutes Allowed?", "P/O Required?", "O/E Exempt?", "TM1:", "TM2:", "Contracts:", "Column Breaks:", "Best Pricing?", "Discount Type:", "Percent %:", "Hold Type:", "Days:", "Cost Code:", "Cost Plus if Net?", "Percent Up from List %:", "Catalog Price?", "Hold Invoices?", "Invoice Copies:", "Invoice Format:", and "Pick Ticket Format:". The "B/O's Allowed?" checkbox is checked.

## Manually Entering the End-User's PID Number in the Customer Window

In many cases, your end-users will update their PID information using the Update My Info page on their web site. However, you can enter the PID number yourself in the Customer window. (If you are using text-based software, see the heading **Manually Entering the End-User's PID Number in the (A) Screen.**)

*Whenever the end-user updates the Update My Info page with a different PID number, the system automatically updates the PID field in the (AU) screen.*

- 1 From the Ensite Pro Master Menu, double-click . The Customer window opens, displaying the Master tab.
- 2 Retrieve the customer or the customer and department for which you are entering a PID number. If you cannot remember the customer's account number, name, or department you can click  to open the Customer Query dialog box.
- 3 Click the Order Entry tab.
- 4 Click the PID box, and enter the PurchasEdge ID number for this customer, as shown in Figure 14.
- 5 Click  to save your changes.
- 6 Repeat this process for every customer for which you have to assign a PurchasEdge ID number. When you finish, click  to close the Customer window. Go to the heading **Manually Transmitting the Data to PurchasEdge.**

## Manually Entering the End-User's PID Number in the (A) Screen

- 1 From the text-based DDMS Master Menu, go to the [A] Customer Master screen, and select the [U] Settings action code.
- 2 The (AU) screen opens. Select the [C] Change action code.
- 3 The cursor moves to the Name field. Retrieve the customer for which you are setting up a PurchasEdge identification number.
- 4 At the Correct Record prompt, press Enter or type Y.
- 5 The cursor moves to the Sub List field. Press Tab to move the cursor to the PID field.

- 6 In the PID field, enter the PurchasEdge identification number for this customer, as shown in Figure 15.
- 7 Press Enter. The system displays the next customer in the database, and repeats the Correct Record prompt. Repeat this process for every customer for which you have to assign a PurchasEdge ID number.

## Manually Transmitting the Data to PurchasEdge

In most cases, you'll use the proc file to transmit your data to PurchasEdge. However, there may be times when you want to transmit the data manually. Perhaps you normally send the data once a month using the proc file but had large sales for the first two weeks of the month, for example. In this case, you might want to send the data mid-month. When you use this procedure, the system sends the same information as when using the proc file.

- 1 From the text-based DDMS Master Menu, go to the [Z] screen, and select the [B4] Execute Program action code.
- 2 In the Enter File Name field, type ;SPC:HPPE. Press Tab.
- 3 In the Enter Unit # field, enter the unit where the files are stored.
- 4 The HP PurchasEdge Item Usage screen opens, and the cursor moves to the Master Location field. See Figure 16.
- 5 In the Master Location field, press Tab to accept the default location, or enter the general ledger location for which you want to send the data.
- 6 In the Vendor ID field, press Tab to accept the default vendor account number HPPE.

**Figure 15:**  
**Entering the**  
**PID Number in**  
**the (AU)**  
**Customer**  
**Settings Screen**

```
15:32:37          (AU) CUSTOMER SETTINGS REV. (11/08/04)          04/11/06
=====
          ACTION [C] ( C=Change, I=Inquire, H=History, S=Sales, B=Back TO A)
===== Company Location [ 1] =====
Acct #   100125  Dept :
Name  :A & A OFFICE PRODUCTS
Suite :475 J
Addr. :2600 SOUTH LOOP, WEST
City  :HOUSTON
State :TX  Zip #77054 [   ] Route :
Phone #713-664-4849 Sic :   Prepay ?
----- ADDITIONAL INFO -----
Sub List :.....

----- SUPPLEMENTAL SETTINGS -----
Exempt from Min. Order Charge :
PID :158800

** ENTER DATA OR <?> FOR HELP !!
```

- 7 In the Dealer HP RID field, enter the RID number for which you want to send invoice data.
- 8 In the Invoice Date From/To fields, press Tab to accept the default dates for the previous month, or enter the beginning and ending dates for which you want to transmit the data to PurchasEdge. You might want to change the dates to the previous month or for only the first two weeks of the month, for example.
- 9 In the Sales Journals to Use fields, press Tab to accept the default sales journals, or enter the sales journals you want the system to search when transmitting the data. The system defaults to use the sales journals set in the (LGA) Sales Journals Parameters screen.
- 10 In the Company Codes fields, press Tab to accept the default, or enter the manufacturer's codes you want to use.
- 11 At the Ready to Process prompt, type Y.
- 12 As the data is transmitted, the Building HP XML Item List to Send to PCN message appears. Once the transmission is completed, the system displays the Successful Transmission, PCN Communications Complete message. Press Enter.

**Figure 16:**  
**Manually**  
**Transmitting**  
**the Data to**  
**PurchasEdge**

```

19:05:01                HP PurchaseEdge Item Usage (04/04/06)                04/11/06

Master Location [ 1]  Vendor ID [HPPE ]
Dealer HP RID [      ]

G/L Location From [ ] to [ ]
Invoice Date From [03/01/06] to [03/31/06]

Sales Journals to use: 1) [JOUR-PO ] Volume [CU ]
                     2) [      ] Volume [  ]

Company Codes [HPG      ,HEW      ,HEW-IS ,HEWLETT ,      ]
               [      ,      ,      ,      ,      ]
    
```

