

PurchasEdge_Integration



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Contents

Understanding PurchasEdge	3
Setting Up PurchasEdge	4
Obtaining a RID Number from PurchasEdge	5
Adding the HP Vendor in the Vendor Window	7
Entering the RID Number in the Vendor Window	7
Adding the HP Vendor in the (C) Screen	9
Entering the RID Number in the (CS) Screen	9
Installing the PurchasEdge Proc File	10
Updating Users in Mass to Use PurchasEdge	12
Using the Default User Settings Page to Enable PurchasEdge	15
Disabling PurchasEdge For Specific Users	15
Obtaining a User PID Number from PurchasEdge	17
Entering or Changing the PID Information on the User's Site	20
Manually Entering the User's PID Number in the Customer Window	21
Manually Entering the User's PID Number in the (A) Screen	22
Manually Transmitting the Data to PurchasEdge	23

Understanding PurchasEdge

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

PurchasEdge has been designed specifically with you and your users in mind, helping you build stronger relationships and drive supply sales by rewarding your 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 (user's) identification number. This is the 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 user's PID number and your RID number enables DDMS to transmit consolidated Electronic Invoice Submissions (described below). *Before users can participate in the program, they 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 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 users in mass on your administrative site to use PurchasEdge.
- Disable PurchasEdge on your administrative site for only those users who do not use the feature.
- Obtain a unique PID number for each user.
- Enter the unique PID number for each user in the DDMS Customer database.

*Email PSN
installation
questions to
support@eci2.com*

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>

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.ecisolutions.com/customers/hp/purchasedge.htm>

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 merges the old account information with the new RID account you receive during this process.

- 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.

Figure 1: The Register as an HP PurchasEdge Reseller Page




The screenshot shows the ECI website's 'Register as an HP PurchasEdge Reseller' page. At the top, there is the ECI logo and the tagline 'The Leader in Industry-Specific Business Software'. Navigation tabs include 'Industries', 'Products', 'Services', 'Why ECI?', 'Company', 'Events', and 'Customers'. A search bar is located on the right. The main content area has a breadcrumb trail: 'Home > Customers > HP PurchasEdge Registration'. The title is 'Register as an HP PurchasEdge Reseller'. Below the title, there is text explaining that PurchasEdge rewards loyal HP supplies customers with points. A section titled 'To learn more about PurchasEdge, use these tools:' lists 'Reseller eBrochure' and 'Rewards Calculator'. A paragraph explains that users can obtain a Reseller ID (RID) from HP PurchasEdge by completing and submitting this form. Below this is the 'PurchasEdge Reseller Application' form, which includes a 'Company Information' section with input fields for 'Company Name', 'Address 1', and 'Address 2'. A sidebar on the left contains links for 'Customer Support', 'Customer Advisory Groups', and 'Training'.

PurchasEdge_Integration

- **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 the RID number is 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 should be contacted for PurchasEdge information.
 - **Currency:** Click the down arrow in this box to select the currency type to use.
 - **Support Tech:** Click the down arrow in this box to select the support technician's name.
 - **Wholesalers:** Click the check box corresponding to each wholesaler with whom you do business. Click the down arrow in the Primary Wholesaler box to select your primary wholesaler. If your primary wholesaler is not shown, click the Other box to enter the wholesaler's name.
 - **Primary/Marketing/Technical/Sales Contact:** Click the First Name through Phone Number boxes to enter the appropriate contact information.
- 3 When finished, click Register.
 - 4 The system displays the Thank You Confirmation page. 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 of your locations. Each location can have a unique RID.
 - 6 Once you have your RID number, you must enter the number in the Vendor database.

Adding the HP Vendor in the Vendor Window

If you are using graphical software, you must add the HP vendor before you can use PurchasEdge. 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**.

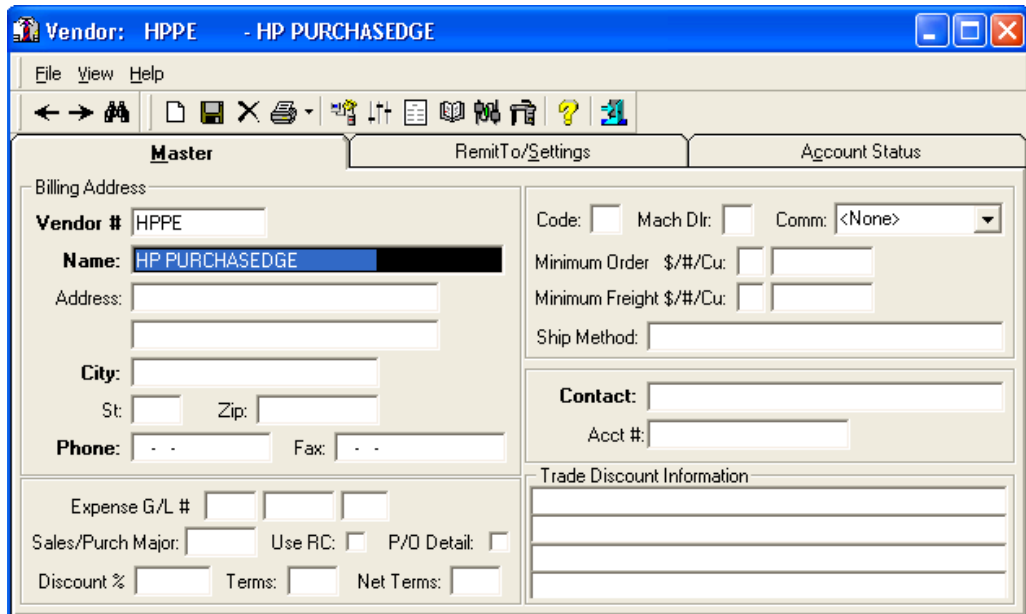
- 1 From the DDMS Master Menu, double-click  .
- 2 Click  . The cursor moves to the Vendor # box.
- 3 In the Vendor # box, type **HPPE**.
- 4 In the Name box, type **HP PURCHASEEDGE**. These are the only boxes you need to complete to add the HP vendor record.
- 5 Click  . See Figure 2.

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 DDMS Master Menu, double-click  .

**Figure 2:
Adding the HP
Vendor Record**



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

- Billing Address:**
 - Vendor #: HPPE
 - Name: HP PURCHASEEDGE
 - Address: [Empty]
 - City: [Empty]
 - St: [Empty] Zip: [Empty]
 - Phone: [Empty] Fax: [Empty]
- Code:** [Empty] **Mach Dir:** [Empty] **Comm:** <None>
- Minimum Order \$/#/Cu:** [Empty]
- Minimum Freight \$/#/Cu:** [Empty]
- Ship Method:** [Empty]
- Contact:** [Empty]
- Acct #:** [Empty]
- Trade Discount Information:** [Empty table]
- Expense G/L #:** [Empty]
- Sales/Purch Major:** [Empty] **Use RC:** [Empty] **P/O Detail:** [Empty]
- Discount %:** [Empty] **Terms:** [Empty] **Net Terms:** [Empty]

PurchasEdge_Integration

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



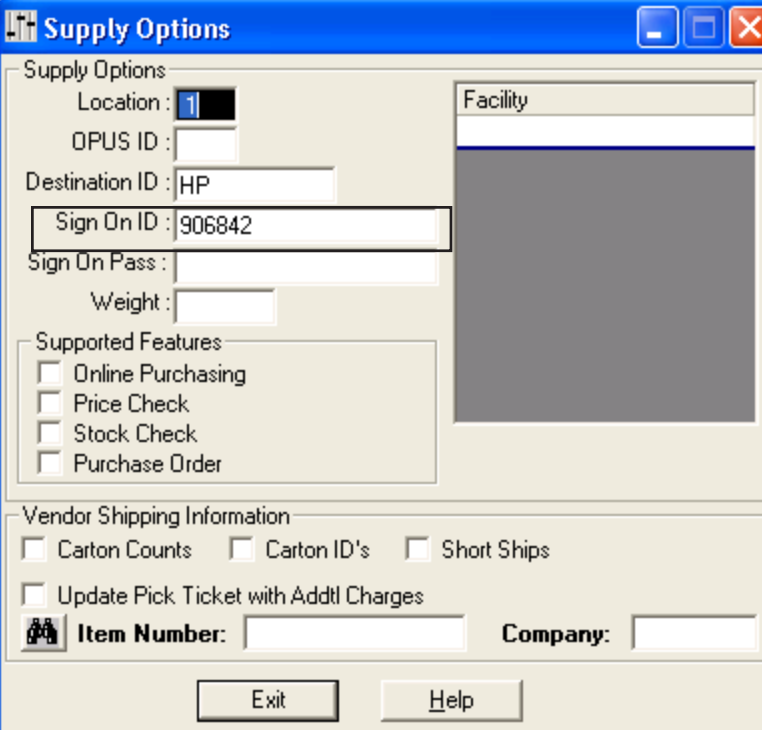
- 2 Click  or type **Ctrl + P**. The Vendor Supply Options dialog box opens.
- 3 The Location box defaults to location 1. Enter the general ledger location for PurchasEdge information.
- 4 Click the Destination ID box and type **HP**.
- 5 Click the Sign On ID box and enter the RID number you received 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 3.
- 6 Click OK.
- 7 In the Vendor Master tab, click  to save your changes. Go to the heading **Installing the PurchasEdge Proc File**.

Figure 3:
Entering the
RID Number



The screenshot shows a dialog box titled "Supply Options". It contains several input fields and checkboxes. The "Sign On ID" field is highlighted with a black border and contains the number "906842". Other fields include "Location" (1), "Destination ID" (HP), "Sign On Pass", "Weight", "Supported Features" (Online Purchasing, Price Check, Stock Check, Purchase Order), "Vendor Shipping Information" (Carton Counts, Carton ID's, Short Ships, Update Pick Ticket with Addtl Charges), "Item Number", and "Company". There are "Exit" and "Help" buttons at the bottom.

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.
- 3 The cursor moves to the Name field, type **HP PURCHASEEDGE**. See Figure 4. 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.

Figure 4:
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
    
```

- 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.
- 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 5.
- 7 Press Tab. The cursor moves to the Vendor Password field. No password is required for the HP PurchaseEdge 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 the information is 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

**Figure 5:
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
    
```

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.

- 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 6.
- 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 to send the HP PurchasEdge information. For example, 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 In the Hour field, press Tab to select the hour of the day to send this information to HP PurchasEdge. After you select the hour, press Enter. For example, to send the information at 5:00 am, you would tab to 5 and press Enter.

Figure 6: The Program Launcher Screen

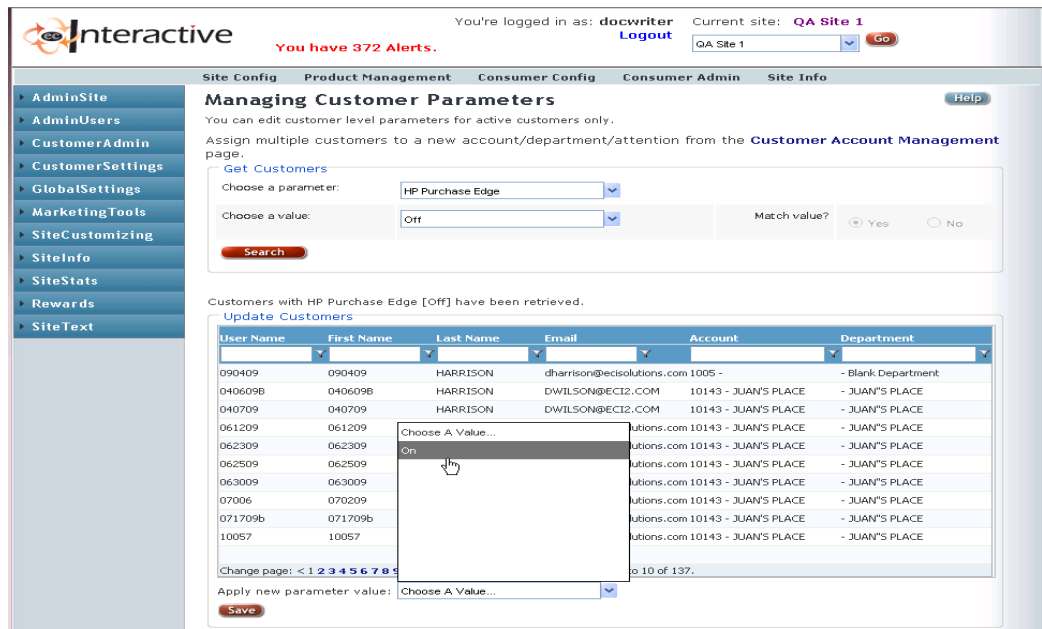
```

+-----+-----+-----+-----+-----+-----+-----+-----+
|                                     | 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] |
+-----+-----+-----+-----+-----+-----+-----+-----+

```


- 1 Go to your Administrative Home Page.
 If you are using eInteractive or is.D-Force2, go to **Step 2**.
 If you are using Dealer Station or is.D-Force, go to **Step 3**.
- 2 If you are using eInteractive or is.D-Force2, use the following instructions to update your users in mass:
 - 2.1 Click the Customer Admin training toolbar and click Parameter Maintenance. You can also click Customer Admin on the side panel and select Parameter Maintenance.
 - 2.2 Click the down arrow in the Choose a Parameter box and select HP PurchasEdge.
 - 2.3 Click the down arrow in the Choose a Value box and click Off.
 - 2.4 Click the Search button. The Loading Customers message appears. Users who are currently not set up to use HP PurchasEdge are shown in the Update Customers box.
 - 2.5 To limit, set filters to include only those customers who can use the HP PurchasEdge feature. You can narrow your list by user name, first name, last name, email address, account number or department. Click the down arrow in the box by which to limit and enter the limiting information.
 - 2.6 Click the down arrow in the Apply New Parameter Value box and click On to enable HP PurchasEdge for the customers shown. See Figure 8.

Figure 8:
Updating
Customers in
Parameter
Maintenance



- 2.7 Click Save.
- 2.8 At the Are You Sure prompt, click Yes. A message appears displaying the number of customers that were updated.
- 3 In Dealer Station and is.D-Force2, use the following instructions to update your users in mass:
 - 3.1 Click User Accounts.
 - 3.2 Click the Update Users in Mass link.
 - 3.3 In the Select Appropriate Search Criteria dialog box, enter the limits that apply. Click Select Users. The Mass User dialog box opens.
 - 3.4 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.
 - 3.5 Scroll to the bottom of the page and click Submit Changes.
 - 3.6 The Confirm Your Changes dialog box opens so you can view the change information. Click Submit Changes.

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

Using the Default User Settings Page to Enable PurchasEdge

If you are using Dealer Station and is.D-Force, in addition to mass updating your users, you can use the Default User Settings page to enable PurchasEdge for all your users. If you are using ecInteractive or is.D-Force2, this option is not available. Go to the heading **Disabling PurchasEdge for Specific Users**.

- 1 Go to your Dealer Station or is.D-Force 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.
- 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 Users

After you update your customers in mass to use PurchasEdge, you can return later and disable it for only those customers who do not use the feature.

- 1 Go to your Administrative Home Page.

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

If you are using eInteractive or is.D-Force2, go to **Step 2**.

If you are using Dealer Station or is.D-Force, go to **Step 3**.


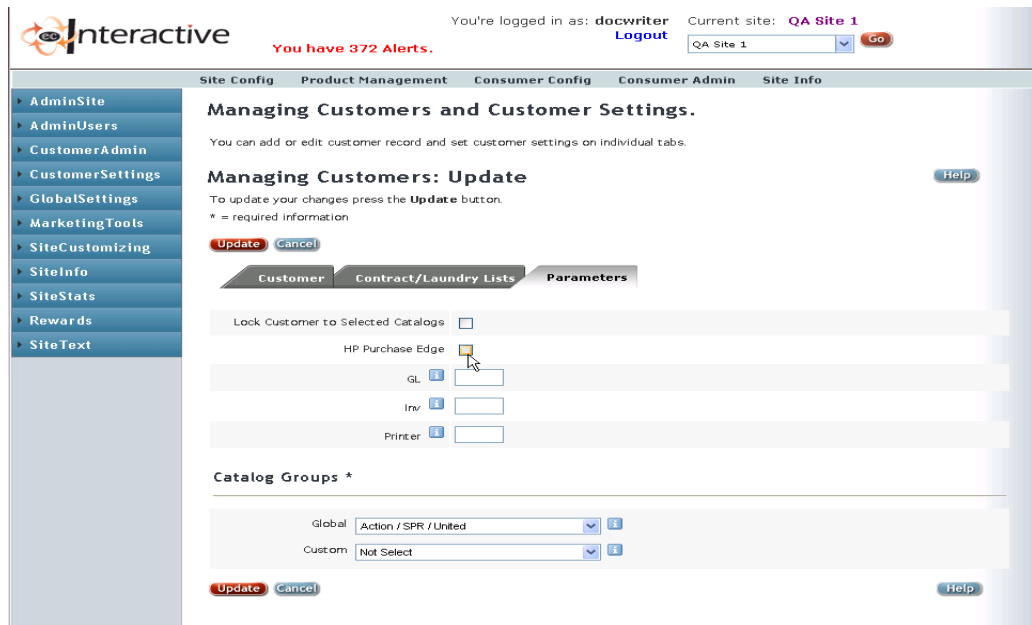
- 2 If you are using eInteractive or is.D-Force2, use the following instructions to disable HP PurchasEdge for Specific Users:
 - 2.1 Click the Consumer Admin training toolbar and select Customer Maintenance, or click Customer Admin on the side panel and click Customer Management.
 - 2.2 Retrieve the customer to change using the First Name through Phone boxes. Click the Search button.
 - 2.3 The Customer Search Page opens, displaying the user that most closely matches the one you specified. Click  corresponding to the customer to change.
 - 2.4 When the Managing Customers Edit page opens, click Edit.
 - 2.5 Click the Parameters tab.
 - 2.6 If the HP PurchasEdge box is checked, clear the check mark to disable the feature. See Figure 11.
 - 2.7 Click Update.
- 3 In Dealer Station and is.D-Force2, use the following instructions to disable HP PurchasEdge for specific end users.
 - 3.1 Click User Accounts.

Figure 11:
Using Customer Admin to Disable PurchasEdge for a Specific User



- 3.2 In the Search for Users dialog box, retrieve the customer who does not use the PurchasEdge feature.
- 3.3 After you select the user, the User Accounts dialog box opens. Scroll down to the User Settings section of the dialog box.
- 3.4 In the Display HP PurchasEdge box, click No, as shown in Figure 12. Clicking No disables this feature for this specific user only.
- 3.5 Scroll to the bottom of the page and click Save.
- 3.6 You must repeat these steps for each customer who does not use PurchasEdge.

Obtaining a User PID Number from PurchasEdge

The next step requires your users to obtain a PID number from PurchasEdge. Each user must have a unique PID number.

- 1 Go to the End User Home Page.
If you are using eInteractive or is.D-Force2, go to **Step 2**.
If you are using Dealer Station or is.D-Force, go to **Step 3**.

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 12:
Disabling the
HP
PurchasEdge
Feature for a
Specific User

PurchasEdge_Integration

- 2 If you are using eInteractive or is.D-Force2, use the following instructions to obtain a User PID number from PurchasEdge:
 - 2.1 Click My Account and click Update My Information.
 - 2.2 The Edit Your Profile page opens. Click the Need an HP PurchasEdge ID link, as shown in Figure 13. Go to **Step 4**.
- 3 If you are using Dealer Station or is.D-Force, use the following instructions to obtain a User PID number from PurchasEdge:
 - 3.1 Click the Update My Info link.
 - 3.2 The HP Account dialog box opens. To obtain a PID, click the Need an HP PurchasEdge ID link, as shown in Figure 14. Go to **Step 4**.

Figure 13:
Selecting the
Need an HP
PurchasEdge ID
Option in
eInteractive

Home About Us Contact Us Help
Currently logged in as doc writer.
(If you are not doc, [click here](#).)
Acct: 10171-this is the company name

Home My Account My Orders Shopping Featured Items Help

QuickSearch
Go
Try Advanced Search

QuickOrder
Shop

MyAccount
Saved Orders: 0
Order History
Available Budget: \$0.0000
Log Out
Edit Profile Help

Edit Your Profile Help

Email Address: robini@ddms.com
Email Format: HTML Capable
Phone Number: 815-273-4321 x
HP PurchasEdge ID: (Need an HP PurchasEdge ID?)
Change Password
Change Security Question
Update

Specials
1 Sarasa Gel Retr Roller Ball Pen, TRS ...
Price: \$1.0000
AVERY

Figure 14:
Selecting the
Need an HP
PurchasEdge ID
Option in
Dealer Station

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 HP Purchasedge
Last Name HP Purchasedge
Email qa@eci2.com
Phone Number 800-959-3367 Ext.
Username hp_user#1
Password
(Used for accessing the system. NO SPACES)
Confirm Password
HP PurchasEdge ID 999999
Need an HP PurchasEdge ID?
Finished

- 4 The PurchasEdge Member Enrollment Form opens, as shown in Figure 15. Click each box and enter the information. When finished, click Submit.
- 5 The PID is emailed to the email account the user specified. Once the PID is received, the user can return to the Edit Your Profile or Update My Info pages to specify personal information, including the new PID number in the HP PurchasEdge ID box. After this is done, the system automatically updates DDMS with the information the 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 User's Site**.

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



PurchasEdge member enrollment form

Figure 15: The PurchasEdge Member Enrollment Form

To enroll in HP PurchasEdge, please provide your information below. Resellers, office-products suppliers and HP reps are not eligible to enroll in PurchasEdge, but can register and access program resources at www.purchasedge.com/reseller.

Please review the [program terms and conditions](#) for specific membership requirements.

Member enrollment form

* = required field

First name*

Last name*

Title*

Business name*

Business phone*

Address 1 (no P.O. boxes)*

Address 2

Country* United States ▾

City*

State* Select ▾

Phone*

Phone ext.


» PurchasEdge

HP PurchasEdge

- » How it works
- » FAQ
- » Free Product Menu
- » Qualifying Supplies List
- » Member promotions
- » Terms and conditions

» Enroll in PurchasEdge

- » Contact PurchasEdge
- » Member login



» Watch the demo

Member requirements

To be eligible for PurchasEdge, your company must meet the following requirements:

- Spend \$500 USD (\$570 CAD[†]) or more each year on [qualifying HP supplies](#) like LaserJet or inkjet print

Entering or Changing the PID Information on the User's Site

After users receive the PID number, they can access their site and specify the information. They do this using the Edit Your Profile or Update My Info pages. When they enter or change the PID number, the DDMS Customer Order Entry tab is automatically updated with the information specified.

- 1 Go to the End User Home Page.
- 2 If you are using eCInteractive or is.D-Force2, go to **Step 2**.
If you are using Dealer Station or is.D-Force, go to **Step 3**.
- 3 Click My Account and click Update My Information.
 - 3.1 The Edit Your Profile page opens. The information for the user who logged in appears in the Email Address, Email Format, and Phone Number boxes. This data is used to contact this individual regarding PurchasEdge information.
 - 3.2 Click the HP PurchasEdge ID box and 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. Do not enter alpha characters, A, B, C and so on.*
 - 3.3 Click Update. The Your Information Has Been Successfully Saved message appears.
- 4 If you are using Dealer Station or is.D-Force, use the following instructions:
 - 4.1 Click the Update My Info link.
 - 4.2 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 PurchasEdge feature. If John Smith is responsible, you would enter John Smith's email address, johnsmith@ddms.com, for example.
 - **Phone Number/Ext:** Enter the phone number and phone number extension of the individual who is 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.*


4.3 Click Finished.

Manually Entering the User's PID Number in the Customer Window

In many cases, your users update their PID information using the Edit Your Profile or Update My Info pages on their front end 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 User's PID Number in the (A) Screen.**)

Whenever users update their profile information with a different PID number, the system automatically updates the PID box in the Customer Order Entry tab.

- 1 From the DDMS Master Menu, double-click . The Customer window opens, displaying the Customer 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 16.
- 5 Click  to save your changes.

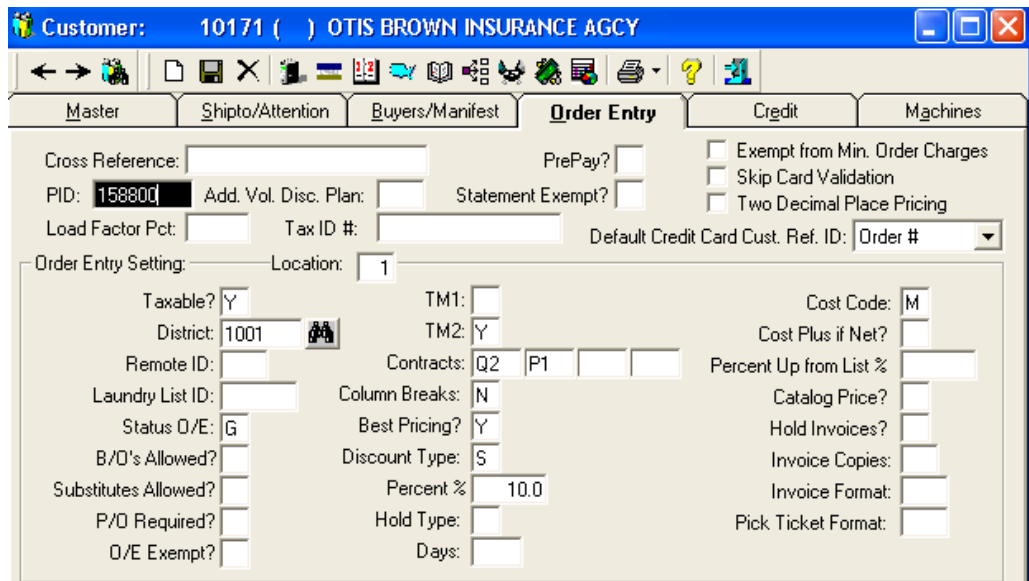
- Repeat this process for every customer for which you have to assign a PurchasEdge ID number. When finished, click  to close the Customer window. Go to the heading **Manually Transmitting the Data to PurchasEdge.**

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

- From the text-based DDMS Master Menu, go to the [A] Customer Master screen, and select the [U] Settings action code.
- The (AU) screen opens. Select the [C] Change action code.
- The cursor moves to the Name field. Retrieve the customer for which you are setting up a PurchasEdge identification number.
- At the Correct Record prompt, press Enter or type Y.
- The cursor moves to the Sub List field. Press Tab to move the cursor to the PID field.
- In the PID field, enter the PurchasEdge identification number for this customer, as shown in Figure 17.
- 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.

Whenever users update their profile information with a different PID number, the system automatically updates the PID field in the (AU) screen.

Figure 16:
Entering the PID Number in the Customer Window




Customer: 10171 () OTIS BROWN INSURANCE AGCY

Master | Shipto/Attention | Buyers/Manifest | **Order Entry** | Credit | Machines

Cross Reference: _____ PrePay? Exempt from Min. Order Charges
 PID: 159800 Add. Vol. Disc. Plan: _____ Statement Exempt? Skip Card Validation
 Load Factor Pct: _____ Tax ID #: _____ Default Credit Card Cust. Ref. ID: Order #

Order Entry Setting: _____ Location: 1

Taxable? <input checked="" type="checkbox"/> Y	TM1: <input type="checkbox"/>	Cost Code: M
District: 1001 	TM2: <input checked="" type="checkbox"/> Y	Cost Plus if Net? <input type="checkbox"/>
Remote ID: _____	Contracts: Q2 P1	Percent Up from List % _____
Laundry List ID: _____	Column Breaks: N	Catalog Price? <input type="checkbox"/>
Status O/E: G	Best Pricing? <input checked="" type="checkbox"/> Y	Hold Invoices? <input type="checkbox"/>
B/O's Allowed? <input type="checkbox"/>	Discount Type: S	Invoice Copies: _____
Substitutes Allowed? <input type="checkbox"/>	Percent % 10.0	Invoice Format: _____
P/O Required? <input type="checkbox"/>	Hold Type: _____	Pick Ticket Format: _____
O/E Exempt? <input type="checkbox"/>	Days: _____	

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 need 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 may decide 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 18.
- 5 In the Master Location field, press Tab to accept the default location, or enter the general ledger location for which to send the data.
- 6 In the Vendor ID field, press Tab to accept the default vendor account number HPPE.
- 7 In the Dealer HP RID field, enter the RID number for which to send invoice data.
- 8 In the Invoice Date From/To fields, press Tab to accept the default

Figure 17:
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 !!

```

PurchasEdge_Integration

dates for the previous month, or enter the beginning and ending dates for which to transmit the data to PurchasEdge. You might need 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 the system should 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 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 18:
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 ,      ]
              [      ,      ,      ,      ,      ]
```