



# *Setting Up eGate*

## Contents

<b>Package Checklist .....</b>	<b>3</b>
<b>What You Need To Set Up .....</b>	<b>4</b>
<b>Understanding the eGate Program .....</b>	<b>6</b>
<b>System Requirements .....</b>	<b>8</b>
<b>Receiving Authorization .....</b>	<b>9</b>
<b>Setting Up Hardware .....</b>	<b>9</b>
<b>Setting Up Your PGD/OS System .....</b>	<b>11</b>
<b>Setting Up Your UNIX System .....</b>	<b>13</b>
<b>Setting Up Your UNIX System on a Network .....</b>	<b>16</b>
<b>Setting Up Your NT System .....</b>	<b>18</b>
<b>Setting Up Your NT System on a Network .....</b>	<b>19</b>
<b>Installing Software .....</b>	<b>21</b>
<b>Configuring Your Port Setup .....</b>	<b>23</b>
<b>Setting Up Custom Pricing .....</b>	<b>27</b>
<b>Setting Up DataPipe II .....</b>	<b>34</b>
<b>eGate Flow .....</b>	<b>34</b>
<b>Using eGate .....</b>	<b>35</b>

## Package Checklist

When you receive the eGate package, make sure the following items are included:

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*Because eGate is a Windows program, not part of the DDMS system, there is also a small monthly support charge. This fee is for software maintenance.*

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- eGate CD-ROM
- Diskette containing Text Based Language (TBL) software or Comm diskette
- 7 foot data cable\* (1)
- CPU module
- Terminal module(s): SPX or OPD
- Modem SPX Flow Control module(s): If you use a standard I/O pad, we include an OPD modem module.
- Gender changer
- 9–25 pin converter for a PC's serial port
- eGate License agreement. (If you received DataPipe II, you should also have a DataPipe II License agreement.)

\*You can request a longer cable at an additional charge.

If any of these items have been inadvertently omitted from your shipment, please contact DDMS.

If you are using eGate with a UNIX system with RAN ports, your package should include:

- eGate CD-ROM
- Diskette containing Text Based Language (TBL) software or Comm diskette
- 7 foot data cable\* (1)
- Digi to Terminal module
- Gender changer
- 9–25 pin converter for a PC's serial port
- eGate License agreement.

\*You can request a longer cable at an additional charge.

If any of these items have been inadvertently omitted from your shipment, please contact DDMS.

## What You Need To Set Up

1 If you are setting up a PGD/OS system, you will need to go to the following headings in the following order:

- Receiving Authorization
- Setting Up Hardware
- Setting Up Your PGD/OS System
- Installing Software
- Configuring Your Port Setup
- Setting Up Custom Pricing
- Setting Up DataPipe II
- eGate Flow
- Using eGate

2 If you are setting up a UNIX system (that is *not* on a network), you will need to go to the following headings in the following order:

- Receiving Authorization
- Setting Up Hardware
- Setting Up Your UNIX System
- Installing Software
- Configuring Your Port Setup
- Setting Up Custom Pricing
- Setting Up DataPipe II
- eGate Flow
- Using eGate

3 If you are setting up a UNIX system that is on a network, you will need to go to the following headings in the following order:

- Receiving Authorization
- Setting Up Your UNIX System on a Network
- Installing Software
- Configuring Your Port Setup
- Setting Up Custom Pricing
- Setting Up DataPipe II (If DataPipe II is the program that you use to move your files to a Windows PC. If not, go to the next heading.)

- eGate Flow**
- Using eGate**
- 4 If you are setting up a NT system (that is not on a network), you will need to go to the following headings in the following order:
  - Receiving Authorization**
  - Setting Up Hardware**
  - Setting Up Your NT System**
  - Installing Software**
  - Configuring Your Port Setup**
  - Setting Up Custom Pricing**
  - Setting Up DataPipe II**
  - eGate Flow**
  - Using eGate**
- 5 If you are setting up a NT system that is on a network, you will need to go to the following headings in the following order:
  - Receiving Authorization**
  - Setting Up Your NT System on a Network**
  - Installing Software**
  - Configuring Your Port Setup**
  - Setting Up Custom Pricing**
  - eGate Flow**
  - Using eGate**

## Understanding the eGate Program

eGate allows you to interact with Internet-based, e-commerce packages that process customer orders remotely and batch transmit to your site.

First, you build your custom pricing and item files. Next, you upload them to your e-commerce connection. Your e-commerce connection can make your pricing and your items available to their customers. When their customers place orders, your e-commerce connection will send those orders back to you. You can use the new eGate program to send these orders to your DDMS system. The orders can then be verified in the (G) Order Entry screen.

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*For more information on using DataPipe II, see the handout Setting Up DataPipe II.*

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**Note:** If you use alternates on your DDMS system, these will not work with eGate. For example, if you have reference items set up, the original item will be placed on the order.

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When building your custom pricing and item files on your Priority Governed Database Operating System (PGD/OS) and UNIX systems, you will use DataPipe II to transmit the files to your PC so that you can send them to your e-commerce connection. If you are on a Windows NT or UNIX system and are set up on a network, the file will automatically be saved as an ASCII text file. You can send this text file directly to your e-commerce connection.

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**Note:** If you are on a UNIX system, you can use DataPipe II or FTP to move the file from your DDMS system to your PC. Either of these methods will automatically create an ASCII text file.

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The eGate program is a generic program that works with the following e-commerce plug-in packages:

- eGate Generic File Build
- eGate OnTheWeb
- eGate deluxesuite
- eGate supersuite
- eGate SuperSolution
- eGate UltraSolution.

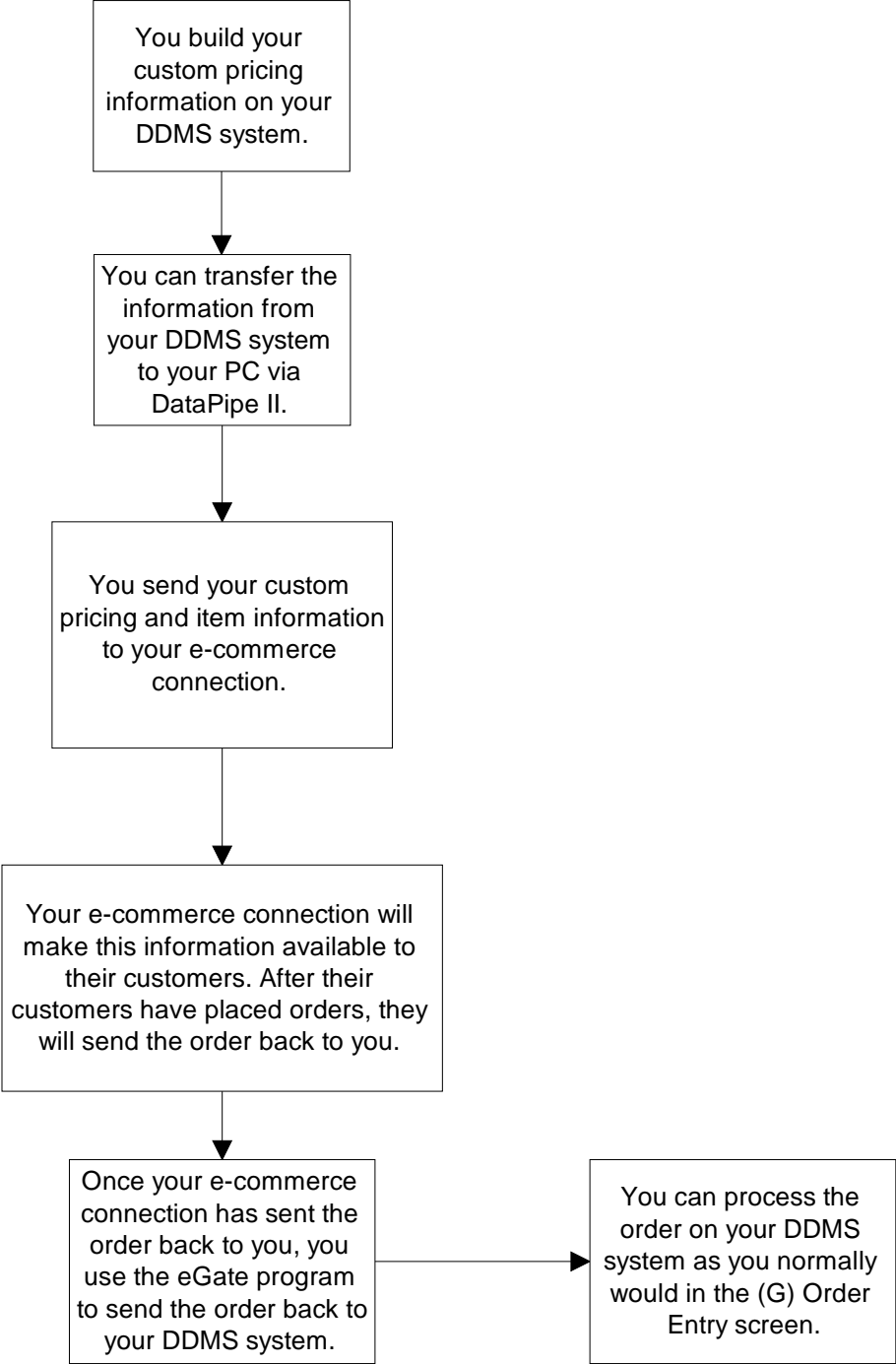
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**Note:** You must authorize eGate before using it. Each of the above products requires separate authorization.

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In this handout, we will cover how to install, set up, and use the eGate program.

**Chart 1: The Flow of Orders Using eGate  
(on a PGD System)**



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**Note:** DDMS also offers a program called eGate Interactive. eGate Interactive links online e-commerce solutions to your DDMS system. With eGate Interactive, your Internet purchasing application receives customer, item, and pricing data from DDMS on demand and customer purchases automatically move into the DDMS order flow. For more information on eGate Interactive, please see the handout entitled *Using eGate Interactive*.

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Chart 1 demonstrates the flow of sending your orders to your e-commerce connection and sending the orders back to your DDMS PGD/OS system. As stated earlier, if you are on a network system such as NT or UNIX, you will not need DataPipe II. Your custom pricing and item files will already be on your PC.

## System Requirements

To use the eGate program, you must have an IBM-compatible PC running Microsoft Windows 95, 98, or Windows NT with 200k of hard disk space and a serial port, and an open I/O port on your DDMS system. In addition, you must currently be using Version 4.E (or later) software on your DDMS system.

On NT systems, you must be on Version 4.E and Text Based Language (TBL) Version 2.70 (or later).

To verify the version of software that is currently on your DDMS system, go to the Master Menu and look at the revision number in the top right-hand portion of the screen. If you are not running Version 4.E or later, please contact the DDMS Support Department to request a software update.

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*For more information on using DataPipe II, see the handout Setting Up DataPipe II.*

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eGate setup will be familiar to anyone who has used any DDMS Windows program such as DataPipe II or TranSpec II. Just like those other Windows programs, eGate works through a direct connection between the serial port of your Windows PC and a port on your DDMS system's I/O pad. eGate can also be set up to work with a modem connection or network connection.

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**Note:** You can use eGate with a network connection on NT or UNIX systems.

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If you are on a PGD/OS or UNIX system, you must have DataPipe II installed. On a UNIX system, you can also use FTP to transfer files.

If you are on an NT system that is *not* on a network, you must have DataPipe II installed.

You will need a serial cable, and an open serial port.

If your serial port has a 9-pin configuration, you must purchase a 25- to 9-pin converter.

## Receiving Authorization

You must authorize eGate as a licensed DDMS product before you can use it. The eGate program must be authorized for all systems including: PGD/OS, UNIX, and Windows 2000.

When you are ready to begin using eGate, you must send an email to [autho@eci2.com](mailto:autho@eci2.com) or fax an authorization request to 571-262-2237. A Customer Support Representative will call you and walk you through the following steps.

- 1 Go to the (Z) System Utilities screen on your DDMS system and select the [B4] Execute Program function.
- 2 At the Enter File Name prompt, type ;SPC:GATE and press Tab.
- 3 In the Enter Unit # field, type Ø4.
- 4 The Licensed DDMS Products screen appears, along with the Mark Product To Enable prompt. Type N to go to the next page of products.
- 5 Type D to move the cursor down until the cursor moves to the eGate program that you want to authorize. For example, if you want to authorize eGate Generic, type D until the cursor is next to eG Interactive.
- 6 Mark the eGate product you want to authorize by typing X.
- 7 The Enter Authorization Code For the Product message appears. Give the eight-digit code displayed in the Dealer Code field to the First Response representative. The First Response representative will provide you with an authorization code to enter in the Authorization Code field.
- 8 When you enter the authorization code, the system displays the Authorization Is Complete -Thank You message. Press Esc. The cursor returns to the Master Menu.

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**Note:** If you press Esc before authorization is complete, you will abort the procedure. If you re-enter this screen, a different dealer code will appear, and the system will not accept the previous authorization code.

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## Setting Up Hardware

Next, set up your system using either a direct connection or a modem connection.

If you are using a network connection, you can skip this step. If you are using the UNIX system, go to the heading **Setting Up Your UNIX System on a Network** or if you are using an NT System, go to the heading **Setting Up Your NT System on a Network**.

## Setting Up eGate

If you want to set up a direct connection, go to the heading **Using a Direct Connection**.

If you want to set up a modem connection, go to the heading **Using a Modem Connection**.

If you are setting up a UNIX system with RAN ports, go the heading **Setting Up Your UNIX System**.

### Using a Direct Connection

A direct connection is a cable connecting two computers. To use a direct connection, use the following instructions:

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**Note:** Make sure the power to both computers is turned off before setting up the hardware.

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- 1 The data cable has a phone jack connector at both ends. Connect one end of the cable to the module marked CPU.
- 2 The module that you connect to the other end of the data cable depends on whether you have a Specialix I/O pad or a Standard I/O pad.

If you have a Specialix I/O pad, attach the cable to the module marked Terminal SPX.

If you have a Standard I/O pad, attach the cable to the module marked Terminal OPD.

- 3 Attach the module marked CPU to the appropriate port on the I/O pad of your DDMS system.

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**Note:** If you are on a PGD/OS system, you must use a port with a large buffer. These are ports 1 through 7 on the first four Specialix I/O pads. If you have a Standard I/O pad, these are ports 5, 6, or 7.

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- 4 Find an available serial port (COM 1, COM 2, COM 3, or COM 4) on the back of your PC.

If it is a 25-pin serial port, connect the gender changer to it.

If it is a 9-pin serial port, connect the 9-25 pin converter to it. (Attach the gender changer to the 9-25 pin converter.)

- 5 Attach the Terminal SPX module to the serial port.

If you have a PGD/OS system, go to the heading **Setting Up Your PGD/OS System**.

If you have a UNIX system, go to the heading **Setting Up Your UNIX System**.

If you have a Windows NT system, go to the heading **Setting Up Your NT System**.

## Using a Modem Connection

Your eGate package also includes cable hardware for setting up a modem connection.

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**Note:** Make sure the power to both computers is turned off before setting up the hardware.

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- 1 The data cable has a phone jack connector at both ends. Attach one end of the cable to the module marked CPU.
- 2 The module that you connect to the other end of the data cable depends on whether you have a Specialix I/O pad or a Standard I/O pad.

If you have a Specialix I/O pad, attach the cable to the module marked Modem SPX Flow Control.

If you have a Standard I/O pad, attach the cable to the module marked Modem OPD. (For more information on flow control, see the heading **Checking for Flow Control on PGD/OS Systems.**)

- 3 Connect the CPU module's end of the cable into the appropriate port on the I/O pad of your DDMS system.

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**Note:** If you are on a PGD/OS system, you must use a port with a large buffer. These are ports 1 through 7 on the first four Specialix I/O pads. If you have a Standard I/O pad, these are ports 5, 6, or 7.

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- 4 Connect the Modem OPD or Modem SPX Flow Control module's end of the cable into the modem.
- 5 Connect the phone line to the correct jack on the modem.
- 6 Connect the modem's power cord to a power source.

If you have a PGD/OS system, go to the heading **Setting Up Your PGD/OS System.**

If you have a UNIX system, go to the heading **Setting Up Your UNIX System.**

If you have a Windows NT system, go to the heading **Setting Up Your NT System.**

## Setting Up Your PGD/OS System

Before you can use eGate, you will need to set up your DDMS PGD/OS system to work with the program. You must set up flow control and modify your (Y) screen.

## Checking for Flow Control on PGD/OS Systems

When setting up eGate, you must set up flow control unless you are using Standard I/O pads. If you are using Specialix I/O pads with your DDMS system and are setting up a modem connection, you must set up flow control. (If you are using Standard I/O pads, this step is unnecessary. Go to the heading **Setting Up the (Y) Screen.**)

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**Note:** Before you change the Use Modem Control field to **Y**, be sure all the modem modules you're using have Specialix modem flow control modules. If you change this field to **Y**, and are using standard Specialix modem modules, this will have an affect on other modems connected to your system, including your communications modems. Before changing this field, contact the DDMS Support Department and request Specialix modem flow control modules for all your modems.

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Use the following instructions to set up for flow control:

- 1 Go to the (Z) screen, and select the [A3] Change System Unit option. The system displays the System Default Settings Window.
- 2 Press Tab to move the cursor to the Use New Modem Control field. Set this field to **Y**.
- 3 At the Make This Permanent prompt, type **Y**.

## Setting Up the (Y) Screen

Any time you add or remove devices from your DDMS system, you must modify the (Y) screen to reflect the changes. The information in each row of the (Y) screen describes the device attached to the corresponding channel of the I/O pad. Each device in your setup is listed in the Device column.

To set up the (Y) screen, use the following instructions:

- 1 Go to the (Y) screen on your DDMS system. Your utilities and batches are listed on the first page of the (Y) screen. You should never *modify these without consulting DDMS*. You configure modems and other peripherals on the second page of the (Y) screen. (If you have more than two I/O pads, the (Y) screen includes additional pages for them.)

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**Note:** Physical numbers 1 through 8 indicate channels 1 through 8 on pad Ø; physical numbers 11 through 18 indicate channels 1 through 8 on pad 1, and so on.

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- 2 Go to the page that displays the port you connected to. Do this by selecting the [N] Next Page action code.
- 3 When the correct page is displayed, select the [M] Modify Dev action code.

- 4 The cursor moves to the first line in the Dev Types field. Press Enter until the cursor moves to the Dev Types field on the correct line. The line should display the correct physical number and I/O channel for the device that you are setting up.
- 5 If there is an existing Device Type in this field, press the Spacebar twice to delete the information. This field should be blank.
- 6 Press Tab until the cursor moves to the Log Name field. In this field, enter **MW**.
- 7 Press Tab until the cursor moves to the Baud Rate field and specify the correct baud rate. The baud rate that you enter must match the baud rate you set in the eGate program.
  - If you use standard I/O pads, DDMS recommends that you enter **9600**.
  - If you use Specialix I/O pads, enter **19200**.
- 8 Press Enter until the cursor moves to the bottom of the screen and the prompt Enter: D=Dyn, S=Stop, Dev, ...(1-3=Page) appears.
- 9 Select the [R] Record Configuration action code, and type **Y** at the You Are About To Make These Changes Permanent prompt.
- 10 Go to the (Z) System Utilities screen and perform a system shut down using the [E6] System Shutdown function.
- 11 When the system reboots, go to the (Y) screen and select the P print a copy of your screen configuration. To print a copy of the (Y) screen, select the [P] Print action code.
- 12 The Printer prompt appears. Press Enter to accept the default printer, or enter the logical name of another printer. After you print the (Y) screen settings, go to the heading **Installing Software**.

## Setting Up Your UNIX System

There are several steps that you must take to set up your DDMS UNIX system. You must determine the TTY port, modify the flow control and baud rates, create the DataPipe script, and edit the TBL.ini file. Once you have configured your UNIX system, you must reboot it in order for the changes to take place.

When setting up your UNIX hardware, there are two ways to setup. If you are using a Specialix I/O pad, refer back to the heading **Setting Up Hardware**. If you are using RAN ports, go to the heading **Setting Up Your UNIX System with RAN Ports**.

## Setting Up eGate

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*When setting up a UNIX system, remember that the commands are case sensitive.*

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**Note:** These instructions assume that you are familiar with the vi editor. If you are not, please contact DDMS Support.

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### Setting Up Your UNIX System with RAN Ports

If you are setting up a UNIX system with Digi RAN ports, use the following instructions to set up your hardware:

- 1 Connect the phone jack to an available DIGI RAN port.
- 2 Attach the Digi to Terminal module that you received with this package to the other end of the cable.
- 3 Attach the gender changer to the Digi to Terminal module. (You may need to attach the 9-25 pin connector to the gender changer.)
- 4 Attach the cable to your PC. You can now begin setting up your UNIX system for eGate.

### Determining the TTY Port

You must determine the TTY port when configuring your UNIX system. eGate will not work properly if the TTY is not set up correctly. To determine which port you want to use, simply determine which port is available. For example, Power PCs have two serial ports: TTYØ and TTY1. Power Stack multi-processor units have three serial ports: TTYØ, TTY1, and TTY2. If the second port on your machine is empty, you would choose **TTY1**. Your UNIX system might also have external ports such as RAN 16 port concentrators, 8 port Async adapters, or Specialix I/O pads. With Specialix ports, you should start at TTY2 or higher.

### Modifying the Flow Control and Baud Rate

In order for eGate to work properly with your UNIX computer, you use the SMIT utility to modify the flow control and baud rate settings.

Use the following instructions:

- 1 When the Login prompt appears, type **keyop** and press Enter.
- 2 When the Keyop Menu appears, select the **[S] SMIT** option.
- 3 When the SMIT menu appears, select **Devices** and then select **TTY**.
- 4 From the TTY menu, select **Change/Show Characteristics Of A TTY**.
- 5 Select the correct TTY port from the menu.
- 6 Change the Enable LOGIN value to **disable**.
- 7 Change the BAUD Rate field to **9600**. This is the DDMS recommended speed for UNIX systems. Remember whatever baud rate you set in this field must match the baud rate set on your PC.

- 8 Set the Flow Control field to **rts** and press Enter.
- 9 If all settings are set properly, the OK message will appear.

## Creating the DataPipe Script

You must create the DataPipe script in the `/u/ddms/bin` directory. This script contains the startup commands for the MW ;New:Com program. Once you've created the DataPipe script, you can launch it manually (each time it is needed), or add it to the Utility startup script. This will keep the DataPipe script active.

Use the following instructions to create the DataPipe script:

- 1 At the Login prompt, type **keyop** and press Enter.
- 2 Enter the Keyop password and press Enter.
- 3 When the Keyop Menu appears, select the **[!] UNIX Shell** option.
- 4 At the UNIX prompt, type **cd /u/ddms/bin** and press Enter.
- 5 At the UNIX prompt, type **pwd** and press Enter. (This step verifies that you are in the `/u/ddms/bin` directory.)
- 6 At the UNIX prompt, type **vi DATAPIPE** and press Enter.
- 7 Type **i** (You will not see the command on the screen).
- 8 Type **nohup TBL \;NEW:COM ! MW &**
- 9 Press Esc and type **:wq**
- 10 Press Enter twice. At the UNIX prompt, type **chmod 777 DATAPIPE** and press Enter.
- 11 Type **DATAPIPE** and press Enter. This will launch the DataPipe script.
- 12 From the UNIX prompt, type **WHO** (in all capital characters). Press Enter. The system should display **;NEW:COM ! MW** in the list.

Use the following instructions to add the DataPipe file to the Utility startup script:

- 1 At the UNIX prompt, type **vi TBL\_UTILS**
- 2 Use your arrow key to move the cursor to the last line.
- 3 Press **Esc** and type **o** (This inserts a blank line below the cursor.)
- 4 Use your arrow key to move to the blank line.
- 5 Press **Esc** and type **i**
- 6 Then type **DATAPIPE** and press Enter.

- 7 Press **Esc** and type **:wq** to end and save the commands.
- 8 Type **exit** to return to the Keyop Menu.

### Editing the TBL.ini File

You must add a line to the TBL.ini file. This file contains the necessary comline definitions. Use the following instructions to edit the TBL.ini file:

- 1 At the Login prompt, type **keyop** and press Enter.
- 2 At the Keyop menu, select the **[5] Edit TBL.ini** option.
- 3 Go to the Modems section and add a line. Type **MW=/dev/tty??,9600** and press Enter.

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**Note:** The above information assumes that MW is the com line ID that is referenced in the UNIX DataPipe script. The questions marks will be replaced with the TTY number. For example, if the correct TTY is 5, you would type **MW=/dev/tty5,9600**.

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- 4 Reboot your computer so that the new configuration can take place. When you finish setting up your UNIX system, go to the heading **Installing Software**.

## Setting Up Your UNIX System on a Network

These instructions are only for UNIX network systems. If you are setting up a PGD/OS system, go to the heading **Installing Software**. If you are setting up an NT system, go to the heading **Setting Up Your NT System**. If you are setting up an NT network system, go to the heading **Setting Up Your NT Network System**.

### Installing the TBL Netcom Program

Use the following instructions to load the TBLNetCom software on your UNIX system:

- 1 Insert the software update tape into the appropriate drive.

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**Note:** All commands are case sensitive. Enter them exactly as shown. For example, if you are instructed to type **D**, you must enter **D** in capital letters.

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- 2 At the Keyop Menu, select the Software Update option and press Enter.
- 3 At the Select Media Drive prompt, select **T** for tape and press Enter.

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**Note:** The system will prompt for the tape drive only if you have more than one drive.

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*When setting up a UNIX system, remember that the commands are case sensitive.*

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- 4 The system begins installing the program. You will see files scrolling across the screen. Once the installation is complete, the system will return to the # prompt.

## Configuring the TBL Netcom Program

You must configure the TBL Netcom program with I/P and port number. Use the following instructions to configure the TBL NetCom program:

- 1 At the # prompt, type **cd /u/ddms/TblNetCom** and press **Enter**.
- 2 At the # prompt, type **./install.script** and press **Enter**.
- 3 The TblNetCom Installation Script prompt appears along with the message You Must Be Superuser. Press **Enter**.
- 4 At the # prompt, type **exit** and press **Enter**.
- 5 At the Press Enter to Continue prompt, press **Enter**.
- 6 At this point, you should reboot your system. To do this, type **\$** from the Keyop Menu.

## Editing the TBLNetCom.ini File

You must edit the TBLNetCom.ini file. This file contains the necessary comline definitions. Use the following instructions to edit the TBLNetCom.ini file:

- 1 From the Keyop Menu, type **!** and press **Enter**.
- 2 At the # prompt, type **cd /u/ddms/TblNetCom** and press **Enter**.
- 3 At the # prompt, type **vi TblNetCom.ini** and press **Enter**.
- 4 Use the arrow keys to move the cursor to the Server = line of the file. Move the cursor to the space behind the = sign.
- 5 To edit the line, press **Escape** twice then type **i**
- 6 Enter the IP address of your UNIX server. Do not use the number keypad to type the address. Enter a space after the number. For example, the line might read Server =127.0.0.1
- 7 Press **Escape** twice then type **D**
- 8 Press **Escape** twice then type **:wq**
- 9 At the # prompt, type **exit** and press **Enter**.
- 10 At the Press Enter to Continue prompt, press **Enter**.
- 11 From the Keyop menu, type **2** to bring your system down. Then type **1** from the Keyop menu to bring your system back up.
- 12 At the Press Enter to Continue prompt, press **Enter**.
- 13 Type **X** to logoff and press **Enter**. Go to the heading **Installing Software**.

## Setting Up Your NT System

There are several steps that you must take to set up your DDMS NT system. You must determine the TBL port, check the flow control baud rates, and set up the device type.

### Determining the TBL Port

You must determine the TBL port when configuring your NT system. eGate will not work properly if the TBL port is not set up correctly. To determine which port you want to use, simply determine which port is available. For example, your TBL server has two com ports available on the back of the machine: COM1 and COM2. If the second port is available, you would assign **COM2** as the TBL port. You can also use any available port on your Specialix I/O pad.

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**Note:** Make note of which COM port you are using. You will need this information when you configure your port setup.

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### Defining the Communications Port

In order for eGate to work properly with your NT computer, you must define the communications port in Gateway.

Use the following instructions:

- 1 Double click the **TBL Configuration** icon on your desktop.
- 2 Click the [+] (plus sign) in front of Advanced.
- 3 When the Advanced folder appears, click **Gateway Definition**.
- 4 Right-click **DataPipe** and then click **Modify**.
- 5 Type **MW** in the TBL Port field.
- 6 Click the **Enable Gateway** option at the bottom of the window.
- 7 Once all your settings are correct, click **OK**.
- 8 If the information to the right of the DataPipe line contains the information **MW** and **TRUE**, close the Advanced folder. If not, repeat the above steps.

### Setting Up the Device Type

Use the following instructions to set up the port:

- 1 Right-click **Modem Definitions** and then click **Add New**.
- 2 You must complete the TBL Name through the Description fields. In the TBL Name field, type **MW**.

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**Note:** You must type this information in all caps.

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- 3 In the Port Name field, enter the port number that you connected your cable to. For example, if you connected the cable to port number 6, type **COM6**.
- 4 In the Port Speed field, DDMS recommends that you enter **19200**.
- 5 Use the list box next to the Flow Control field to select **Hardware**.
- 6 In the Description field, type **EGATE**.
- 7 If all the settings are correct, click **OK**.
- 8 Close the TBL Server then reboot the TBL Server. Now, you are ready to install your software.

## Setting Up Your NT System on a Network

These instructions are only for NT network systems. If you are setting up a PGD/OS or UNIX system, go to the heading **Installing Software**.

### Configuring Your NT Server

Use the following instructions to configure the TCP/IP properties on your NT server:

- 1 Locate the Network Neighborhood icon on your desktop and right-click the icon.
- 2 Select **Properties**.
- 3 Click the **Protocols** tab.
- 4 If TCP/IP Protocol does not appear in the Network Protocols window, click **Add**. Highlight **TCP/IP Protocol**. Click **OK**. Go to **Step 5**.  
If TCP/IP Protocol appears in the Network Protocols window, highlight it and select **Properties**.
- 5 Select the **IP Address** tab.
- 6 Select the **Specify an IP Address** option then enter the IP Address and Subnet Mask for this machine or server.

---

**Note:** Since this machine is your DDMS server, it should have the TCP/IP Protocol listed with the IP Address and Subnet Mask already set up. However, if this machine was not previously connected to the Internet, the Gateway may not be set up.

---

- 7 In the Gateway field, enter the IP Address of the Gateway or Router.
- 8 Click **Apply** then **OK**.

## Installing the TBL NetCom Program

If you had previously installed WinNewCom on your NT system, you must remove it before installing the TBL NetCom program.

Use the following instructions to install the TBL NetCom Program:

- 1 Close all applications on your system.
- 2 Insert the CD-ROM into the proper drive.
- 3 Click **Start**, then select **Run**.
- 4 In the Run window, type the letter of your CD-ROM drive then click **Browse**. For example, you might type D: or E:.
- 5 In the Browse window, double-click the **TBLNetCom** folder.
- 6 Double-click **Setup.exe**.
- 7 The system returns to the Run window. Click **OK**. This will load the TBL NetCom program to your D: drive.
- 8 The installation will continue until the Software License Agreement for the Java Software appears. Click **Yes** to accept the agreement.
- 9 The next prompt allows you to choose where to load the Java software. The default path is C:. You can enter a new path or click **Next** to continue.
- 10 When the installation is complete, the TBL NetCom Readme.txt file displays. Close this window and any other windows that may be open.
- 11 Reboot your machine as you normally would.

## Configuring the TBL NetCom Program

You must configure the TBL NetCom program with I/P and port number. Use the following instructions to configure the TBL NetCom Program:

- 1 Right-click **Start** then select **Explore**.
- 2 Double-click the letter of the drive that you installed this program on. (If you accepted the default during the install, this would be drive D:.)
- 3 Double-click the **DDMS** folder.
- 4 Double-click the **TBLNetCom** folder.
- 5 Double-click **StartTNC.bat**.
- 6 Double-click **StopTNC.bat**.
- 7 Double-click **TBLNetCom.ini**.

---

**Note:** If you cannot locate the TBLNetCom.ini file, please call DDMS Support.

---

- 8** In the Port field, enter **8766**.
- 9** In the Server = field, remove the words after the = (equal sign) and enter your IP address. For example, the line might read Server =127.0.0.1
- 10** From the Menu, click **File**.
- 11** Click **Save**.
- 12** Close any windows that may be open and reboot your machine as you normally would.

## Installing Software

You must install eGate from the CD that you received with this package and you must install the Communications diskette. You must also install the plug-in software. If you are on a Windows NT or UNIX system and using a network connection, you must install the TBL NetCom from the CDROM. With the exception of the TBL NetCom program, you install all the software on your PC, not the DDMS Server.

---

**Note:** The eGate CD that you received with this package contains the eGate program, the e-commerce plug-in program, and the TBL NetCom program.

---

## Installing eGate

The eGate package includes an eGate program CD-ROM to install on your PC. Installing this program on your PC is as simple as loading any other Windows program.

---

**Note:** Do not install this program on your DDMS server.

---

Use the following instructions to install eGate on your PC:

- 1** Insert the eGate CD-ROM into the proper drive.
- 2** Click **Start**, then select **Run**.
- 3** In the Run window, type **D:\Setup** and press Enter. The Welcome to eGate II Installation window appears. (If your CD-ROM drive is drive E:, type E:\SETUP.)
- 4** Follow the prompts on your screen to install eGate.
- 5** When the installation is complete, you have the option of rebooting your system. You do not have to reboot at this time.

## Installing the E-Commerce Plug-In

When you purchased eGate, you also purchased an e-commerce plug-in. You must install that plug-in on your PC before you can use eGate.

---

**Note:** Do not install this program on your DDMS server.

---

Use the following instructions to install the eGate plug-in on your PC:

- 1 Insert the eGate CD-ROM into the proper drive.
- 2 Click **Start**, then select **Run**.
- 3 In the Run window, type the letter of your CD-ROM drive then click **Browse**. For example, you might type D: or E:.
- 4 In the Browse window, a folder appears with the same name as the eGate plug-in you purchased. For example, the folder name might be OnTheWeb or SuperSolution. Double-click the folder to open it.
- 5 Double-click the executable (\*.exe) file. The system returns to the Run window with the path that you specified in the Open field. For example, the Open field might read D:\ONTHEWEB\EGATEONTHEWEB.EXE. Click OK.
- 6 Follow the prompts on your screen. When the installation is complete, reboot your system as you normally would. If you are using a network connection, go to the heading **Configuring Your Port Setup**. If you are not using a network connection, go to the heading **Installing the Comm Program**.

## Installing the Comm Program

Follow these steps to install the Comm diskette:

- 1 Insert the Comm Program diskette into the appropriate drive on your DDMS system.
- 2 To install this program, go to the (Z) screen and select the **[B6] Execute Proc File** function.
- 3 At the prompt Enter File Name, type **INSTALL**. Press Tab.
- 4 In the Enter Unit # field, type **Ø2**.
- 5 The Are You Ready To Update prompt appears. To continue with the update, type **Y**.
- 6 The system copies the program to your DDMS system. When the copy process is finished, the All Finished prompt appears. Press Enter.
- 7 Next, reboot your system. To do this, use the **[E6] System Shutdown function** in the (Z) screen as you normally would.

## Configuring Your Port Setup

Before you can use the eGate program, you must set up the type of connection that you will use. There are three types of port setup available: modem, direct, and network.

You can set up these connections manually or allow the system to automatically detect and configure your ports. On PGD/OS systems, you can only set up for a modem or direct connection. On Windows NT or UNIX systems, you can set up for a modem, direct, or network connection. However, if you're using a network connection on an NT or UNIX system, you must manually set up the port. See the heading **Manually Setting Up Ports**.

No matter which port setup you choose, you must run a test program to ensure that your setup is working correctly. Instructions for running this test are included in your port setup instructions. To allow the system to set up the ports automatically, see the heading **Automatically Setting Up Ports**. To manually set up your modem, direct, or network connection, go to the heading **Manually Setting Up Ports**.

---

**Note:** DDMS recommends that you allow the system to automatically set up your ports. However, if you're using a network connection on an NT or UNIX system, you must manually set up the port. Go to the heading **Manually Setting Up Ports**.

---

### Automatically Setting Up Ports

You can have the system automatically determine your connection settings for you, or you can manually set the connections yourself. The following steps detail how to let the system automatically make the connection for you.

---

**Note:** If you're using a network connection on an NT or UNIX system, you must manually set up the port. See the heading **Manually Setting Up Ports**.

---

To let the system determine your connection settings, follow these steps:

- 1 To open the program, click **Start** then point to **Programs**.
- 2 Click **eGate**.
- 3 When the program opens, click the **Port Setup** button.
- 4 The Communication Port Setup window appears, as shown in Figure 1. Click the **Check Ports** button. The system will automatically determine the connection you made earlier and will prompt you with the correct port and baud rate. Click **OK**.

## Setting Up eGate

- 5 The system returns to the Communication Port Setup window. Next, test your new connection by clicking the **Test** button. When the test is complete, the message Communications Test Succeeded appears. Click **OK**.

---

**Note:** If the test fails, go back through the instructions in this document to make sure the hardware and software have been set up correctly. For example, specifying the wrong baud rate or com port during setup would cause the test to fail. If your setup checks out and the test still fails, call DDMS Support.

---

- 6 Your port setup is now complete. Click **OK**. You are now ready to begin using the eGate program. Go to the heading **Setting Up Custom Pricing**.

## Manually Setting Up Ports

You can have the system automatically determine your connection settings for you, or you can manually set the connections yourself. The following steps details how to set the connections manually. If you are using a network connection, you must set up your connection manually. To do this, go to the heading **Setting Up a Your Network Connection**.

**Figure 1: The Communication Port Setup Window**

The screenshot shows the 'Communication Port Setup' dialog box. It features three main sections for connection configuration: 'Direct Connection', 'Modem Connection', and 'Network Connection'. The 'Direct Connection' section includes dropdown menus for 'Direct Port' (set to COM1) and 'Baud Rate' (set to 9600). The 'Connect' section has radio buttons for 'Modem', 'Direct' (selected), and 'Network'. The 'Modem Connection' section includes dropdowns for 'Modem Port' (COM1) and 'Baud Rate' (19200), along with text input fields for '(Optional) Dialing Prefix' and 'Main Dial String'. The 'Network Connection' section has text input fields for 'Server Port', 'DDMS Port ID', and 'Server Address'. On the right side, there are buttons for 'OK', 'Cancel', 'Test', 'Check Ports', and 'Help'.

## Setting Up Your Modem Connection

Use the following instructions to setup a modem connection for eGate:

---

**Note:** You can set up a modem connection for PGD/OS, UNIX, and NT systems.

---

- 1** To open the program, click **Start** then point to **Programs**.
- 2** Click **eGate**.
- 3** When the program opens, click the **Port Setup** button.
- 4** The Communication Port Setup window appears. Under the heading **Connect**, click the **Modem** check box.
- 5** Under the heading **Modem Connection**, you can set up your modem port, baud rate, dialing prefix, and main dial string.

**Step 1:** To set up your modem port, click the arrow to the right of the **Modem Port** box. Click the name of the com port that your modem is connected to from the list box.

**Step 2:** To set up your baud rate, click the arrow to the right of the **Baud Rate** box. Select the baud rate of your modem from the list box.

---

**Note:** Whatever baud rate you set in this box must match the baud rate set on your DDMS system.

---

**Step 3:** To set up your dialing prefix, click the **(Optional) Dialing Prefix** box. If you have to dial a number to access an outside line, enter that number here. For example, if you must dial a 9 to reach an outside line, type **9**.

**Step 4:** To set up your main dial string, click the **Main Dial String** box. Enter the phone number that your modem has to dial.

- 6** To test your settings, click **Test**. When the test is complete, the message **Communications Test Succeeded** appears. Click **OK**.

---

**Note:** If the test fails, go back through the instructions in this document to make sure the hardware and software have been set up correctly. For example, specifying the wrong baud rate or com port during setup would cause the test to fail. If your setup checks out and the test still fails, call DDMS Support.

---

- 7** Your modem setup is now complete. Click **OK**. You are now ready to begin using the eGate program. Go to the heading **Setting Up Custom Pricing**.

### Setting Up Your Direct Connection

Use the following instructions to setup a direct connection for eGate:

---

**Note:** You can set up a direct connection for PGD/OS, UNIX, and NT systems.

---

- 1 To open the program, click **Start** then point to **Programs**.
- 2 Click **eGate**.
- 3 When the program opens, click the **Port Setup** button.
- 4 The Communication Port Setup window appears. Under the heading **Connect**, click the **Direct** check box.
- 5 Under the heading **Direct Connection**, you can set up the direct port and baud rate.

**Step 1:** To set up your port, click the arrow to the right of the **Direct Port** box. Select the name of the com port that you are using from the list box.

**Step 2:** To set up your baud rate, click the arrow to the right of the **Baud Rate** box. Click the correct baud rate from the list box.

---

**Note:** Whatever baud rate you set in this box must match the baud rate set on your DDMS system.

---

- 6 To test your settings, click **Test**. When the test is complete, the message **Communications Test Succeeded** appears. Click **OK**.

---

**Note:** If the test fails, go back through the instructions in this document to make sure the hardware and software have been set up correctly. For example, specifying the wrong baud rate or com port during setup would cause the test to fail. If your setup checks out and the test still fails, call DDMS Support.

---

- 7 Your direct connection setup is now complete. Click **OK**. You are now ready to begin using the eGate program. Go to the heading **Setting Up Custom Pricing**.

### Setting Up Your Network Connection

Use the following instructions to setup a network connection for eGate:

---

**Note:** You can set up a network connection for Windows NT or UNIX systems only.

---

- 1 To open the program, click **Start** then point to **Programs**.
- 2 Click **eGate**.

- 3 When the program opens, click the **Port Setup** button.
- 4 The Communication Port Setup window appears. Under the heading **Connect**, click the **Network** check box.
- 5 Under the heading **Network Connection**, you can set up the server port, server address, and DDMS port ID.
  - Step 1:** To set up your server port, click the **Server Port** box. Enter the number of the port you are using on your network server. This is a unique number between 1 and 32676 and is designated by your server. The default is 8766.
  - Step 2:** To set up your server address, click the **Server Address** box. Enter the name of the network's address. For example, enter the TCP/IP address or host name of your server you are using such as 192.9.121.75 or your server name.
  - Step 3:** To set up your DDMS port ID, click the **DDMS Port ID** box. Type **MW**.
- 6 To test your settings, click **Test**. When the test is complete, the message **Communications Test Succeeded** appears. Click **OK**.

---

**Note:** If the test fails, go back through the instructions in this document to make sure the hardware and software have been set up correctly. For example, specifying the wrong baud rate or com port during setup would cause the test to fail. If your setup checks out and the test still fails, call DDMS Support.

---

- 7 Your network setup is now complete. Click **OK** to accept. You are now ready to begin using the eGate program.

## Setting Up Custom Pricing

You set up custom pricing in the (+L) Create eGate Upload Files Screen on the DDMS system. Once you have built the custom pricing files, you can transfer this information to your PC via DataPipe. With this information on your PC, you can transfer the information to your wholesaler.

When you build the custom pricing, four files are created. Refer to the heading **Custom Pricing Files** for more information. Use the following instructions to set up custom pricing information for specific customers:

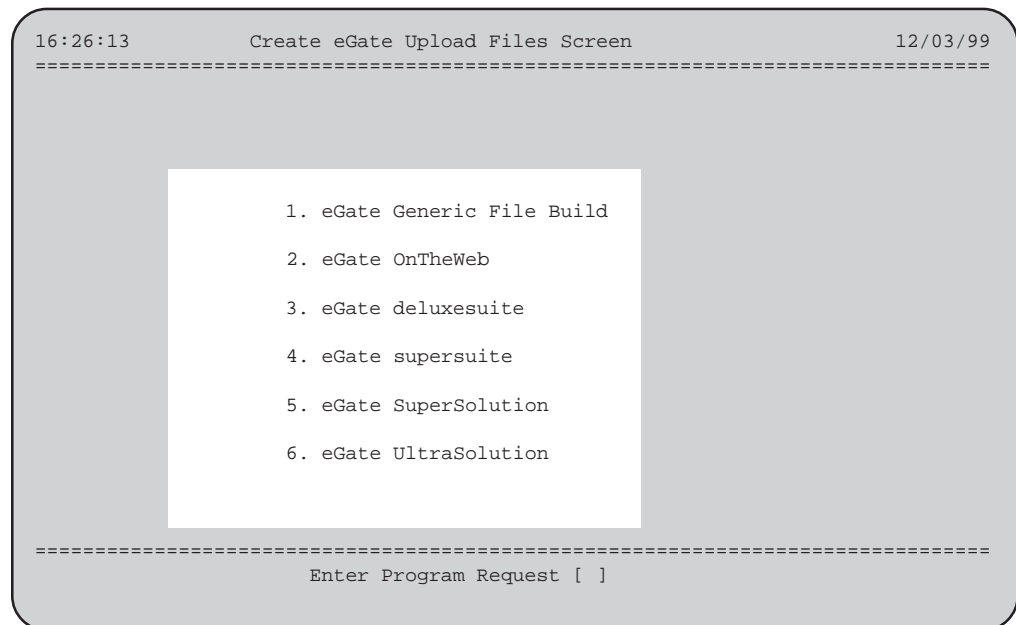
- 1 From the DDMS Master Menu, type **+L**.
- 2 The system displays the Create eGate Upload Files Screen, as shown in Figure 2. In this screen, you select which eGate package you are using.

## Setting Up eGate

Enter one of the following responses:

- 1 eGate Generic File Build
  - 2 eGate OnTheWeb
  - 3 eGate deluxesuite
  - 4 eGate supersuite
  - 5 eGate SuperSolution
  - 6 eGate UltraSolution
- 3 The Create eGate Upload Files screen appears with the cursor in the Name field. Retrieve the record of the customer for whom you want to set up the custom pricing information. Customer records can be retrieved by customer name, customer account number, or customer account number and department number.
- To retrieve a record using the customer name, enter part or all of the customer's name in the Name field, and press Enter. Go to **Step 5**.
  - To retrieve the record by customer account number, press Tab until the cursor moves to the Account # field. Enter part or all of the customer's account number, and press Tab. Go to **Step 4**.
- 4 The cursor moves to the Dept field. If you want to retrieve a record for a specific department, enter the department number. If you want to retrieve the master record, press Enter.

**Figure 2: The Create eGate Upload Files Screen**



*If the customer you retrieve has any contracts assigned to their record in the (A) screen, the system displays the contracts in the Customer Contracts fields. These fields are for display only.*

- 5 After you enter a department number or press Enter to go past the Dept field, the system retrieves the record you specified, or the record that most closely matches it. The system also displays the Correct Customer prompt.

At the Correct Customer prompt, enter your response according to the following:

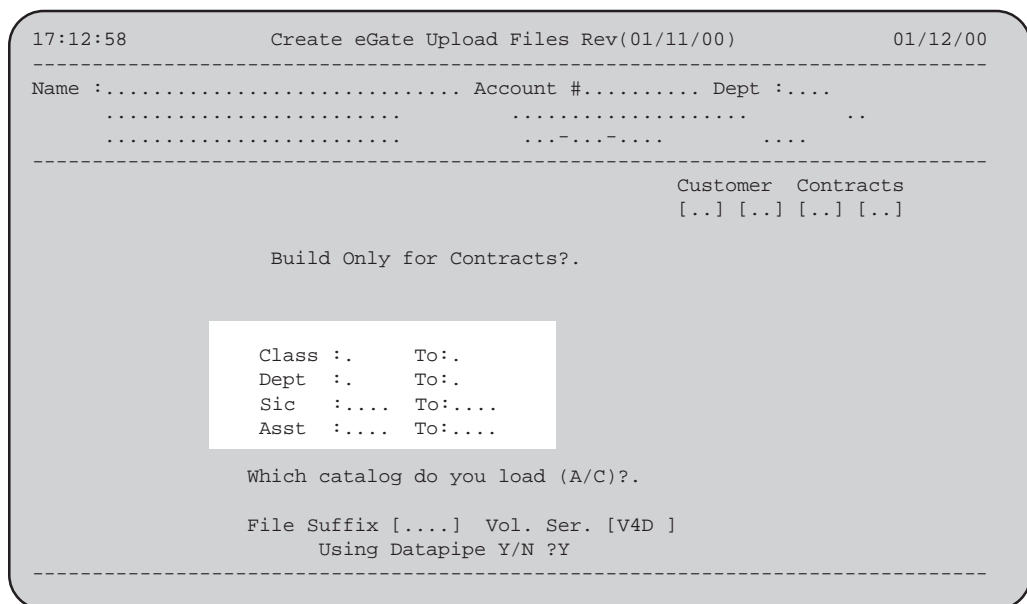
- N This is not the correct customer. The system displays the next record in the database.
- Esc The cursor returns to the Name field, so that you can specify a different customer.
- Y This is the correct customer.

- 6 The cursor moves to the Build Only For Contracts field. Enter one of the following responses:

- Y The system will include only items that are entered on a contract for the displayed customer. Go to **Step 8**.
- N **(default)** The system will include all items entered in the (E) screen. Go to **Step 7**.

- 7 The cursor moves to the first limit field. You use the Class/To through Asst/To fields to limit which items are included in the custom pricing information for this customer. See Figure 3. You can use any combination of limits, but an item must fall within all the limits to be included.

**Figure 3: The Limit Fields in the (+L) Screen**



---

**Note:** There are no default limits. If you do not specify limits, the custom pricing information will include all items from the (E) screen for this customer.

---

- If you do not want to set limits, press Enter until the cursor moves to the Which Catalog Do You Load field. Go to **Step 8**.
- To set limits, press Tab to move the cursor to each field you want to use to set limits. Enter the beginning of the range of items you want to include in the From field. If you do not completely fill the field with characters, press Tab. In the corresponding To field, enter the end of the range of items you want to include. When limiting to a single value, you can enter the same value in both the From and To field. Use the following instructions to set limits:

**Step 1:** In the Class/To fields, you can limit the items you want to include by specifying a range of stock classes. Stock classes are used to group items for numerous purposes, such as indicating whether an item is stocked or whether it is bought directly from the manufacturer. (The system uses the stock class specified in the CLASS field in the Pricing Record of the (E) Inventory Master screen. If a stock class is not specified in this field, the system will use the stock classes specified in the CLASS field in the Master Record in the (E) screen.)

**Step 2:** Use the Dept/To fields to limit the items you want to include by specifying a range of departments. Item departments are used to group similar items, to indicate the general ledger minor account the item is in for sales purposes, and to indicate whether the item is taxable. (The system uses the department specified in the Dept field in the Pricing Record of the (E) Inventory Master screen. If a department is not specified in this field, the system will use the department specified in the Dept field in the Master Record in the (E) screen.)

**Step 3:** In the Sic/To fields, you can limit the items you want to include by specifying a range of sic codes. Sic codes can be any user-defined sorting code or a standard industry code. (Sic codes are set in the Sic field in the Master Record in the (E) screen.)

**Step 4:** Use the Asst/To fields to limit the items you want to include by specifying a range of assortment codes. Assortment codes are used for assortment pricing, which lets you groups similar items together for quantity price breaks. (Assortment codes are set in the Assort field in the (E) screen.)

**8** The cursor moves to the Which Catalog Do You Load field. In this field, specify which e-commerce catalog type you want to load.

---

**Note:** You must enter a response in this field. If you try to leave this field blank, the You Must Specify a Catalog Type message appears. Also, If you specify any letter other than A or C, the Invalid Catalog Type message appears.

---

Enter your response according to the following:

- A** The system will load the e-commerce connection's Alpha catalog.
  - C** The system will load the e-commerce connection's Category catalog.
- 9** The cursor moves to the File Suffix field. In this field, specify the four character suffix of your output file. You should name the file in a way that will help you identify it later. For example, if your customer is A&A Office Products, you could name the file AAOP.
- If you specify four characters, the cursor moves to the Vol Ser field. If you specify fewer than four characters, press Tab.
  - If you try to leave this field blank, the You Must Specify An Output File Suffix message appears.
  - If you specify an existing file, the cursor remains in the File Suffix field, and the system displays the File Exists - Existing Records Would Be Replaced - Continue message. It is not recommended to reuse a file name. Type N and specify a new file name.
- 10** The Vol Ser field defaults to the volume serial specified in the Work field in the Volume Serials Record in the (LØ) Global Master screen. Enter the volume serial that you want this custom pricing file built on and press Enter.
- 11** When you specify the volume serial or press Tab to accept the default, the cursor moves to the Using DataPipe field.

Enter your response according to the following:

- Y** The system uses DataPipe II to move your pricing files to your PC.
  - N** The system uses a different method of file transfer, FTP, for example.
- 12** The system displays the Are You Sure prompt. Enter your response according to the following:
- Y** The system saves the custom pricing information in the file you specified. The system also clears the fields and returns to the Name field so you can specify custom pricing information for another customer.

**N (default)** This is not the correct custom pricing information you want to set up for this customer. The cursor returns to the Name field so you can begin again.

**13** When you finish setting up custom pricing information for your customers, press Esc to return the cursor to the Master Menu.

### Custom Pricing Files

When this custom pricing program is used, four files are created:

- Price file (PRCE)
- Item file (ITEM)
- Vendor file (VEND)
- Category file (CATG).

Since these files will be converted to an ASCII text file, the file name is limited to eight characters. Four of these characters will be used as a file prefix. The file prefixes are listed above. The program will attach the appropriate prefixes to each file.

The first file created is the Price file. The Price file contains a record for every item that is either a contract item for this customer or an item that falls within the limits that you set. The Item file, Vendor file, and Category file contain information only for items setup in your inventory that meet the limits that you set in the (+L) screen.

Each of these four files are described below. After you've read the descriptions of these files, you can decide which files to transfer to your e-commerce connection based on the information they requested.

#### Price File

The Price file contains a record for each item that is either included on the customer's contract or included within the set limits. This file also contains the following information:

- Item list price
- Selling price of the item
- Company name (from the company field in the (E) screen)
- Alias number (if applicable).

The contents of this file are sorted by prefix and stock number order. All items with the same prefix are grouped together, and arranged by stock number within each prefix.

When using this custom pricing program, you use the File Suffix field to specify which customer these files are for. For example, if your customer is A&A Office Products, in the File Suffix field, type AAOP. The name of the Price file for A&A Office Products would be PRCEAAOP.

## Item File

The Item file contains only items that are setup in your inventory that meet the limits that you set in the (+L) screen. This file also contains the following information:

- Item description
- Company field
- Product code
- UPC number
- Customer alias number
- Substitute item number
- List price
- Selling price
- Retail unit of measure.

The contents of this file are sorted by prefix and stock number order.

When using this custom pricing program, you use the File Suffix field to specify which customer these files are for. For example, if your customer is A&A Office Products, in the File Suffix field, type AAOP. The name of the Item file for A&A Office Products would be ITEMMAOP.

## Vendor File

The Vendor file contains a listing of vendors who have items in the item file. This file is sorted in company name order (from the company field in the (E) screen).

This file also contains the Vendor number from the Direct Buy record as well as the full vendor name from the Vendor Master File (V-MASTER), if the following conditions are met.

---

**Note:** The contents of the V-MASTER file can be viewed in the (C) Vendor Master screen.

---

In order for the Vendor number from the Direct Buy record to be included in this file, the item must have a Direct Buy record with the vendor name entered. For the full vendor name to be added to the file, the vendor in the Direct Buy record must match a vendor number in the V-MASTER file. When the program finds a match between the vendor in the item's Direct Buy record and a vendor number in the V-MASTER file, then the full vendor name is moved to the vendor file.

When using this custom pricing program, you use the File Suffix field to specify which customer these files are for. For example, if your customer is A&A Office Products, in the File Suffix field, type AAOP. The name of the Vendor file for A&A Office Products would be VENDAAOP.

## Category File

The Category file contains the product codes from the SIC field. The extended description corresponding to that SIC code will be added to the Category file.

## Setting Up eGate

Therefore, the SIC codes and their extended descriptions must be entered for all items that are in the inventory database. After SIC codes have been entered in the SIC field of the (E) screen, you can enter extended descriptions for these items in the (EX) Extended Descriptions screen. The Category file will only contain one entry for each SIC code and extended description.

---

**Note:** You can load the SIC codes using the O/PUS update if your wholesaler makes them available.

---

When using this custom pricing program, you use the File Suffix field to specify which customer these files are for. For example, if your customer is A&A Office Products, in the File Suffix field, type AAOP. The name of the Category file for A&A Office Products would be CATGAAOP.

## Setting Up DataPipe II

Once you've built your files on the DDMS system, you can transfer files to your PC. If you are using DataPipe II to transfer files from your DDMS system to your PC to use with eGate, you must set up the Options window in DataPipe II.

Use the following instructions:

- 1 From your desktop, click **Start** then select **Programs**.
- 2 From the Programs menu, select **DataPipe2**.
- 3 Click **Options**.
- 4 Select the **Fixed** option.
- 5 Type **36** in the Length field.
- 6 Click **OK**.

## eGate Flow

Once you've built your files on the DDMS system, you can transfer files to your PC. If you are on a PGD/OS DDMS system, you can use DataPipe II to transfer the files that you need to send your e-commerce connection. If you are on a UNIX system, transfer the files using FTP or DataPipe II. If you are on a network NT or UNIX system, your files should already be on your system. If your NT or UNIX system is not on a network, you must use DataPipe II to transfer files.

The next step is sending these pricing files to your e-commerce connection who then makes this information available to their customers.

Once the e-commerce connection has received orders from their customers, they can send the files back to you. Now, you are ready to use the eGate program.

## Using eGate

You use eGate to transfer the orders that you received from your e-commerce connection to your DDMS system.

---

**Note:** If you are using DataPipe II to transfer files from your DDMS system to your PC, you must set up the Options window in DataPipe II. Refer back to the heading **Setting Up DataPipe II**.

---

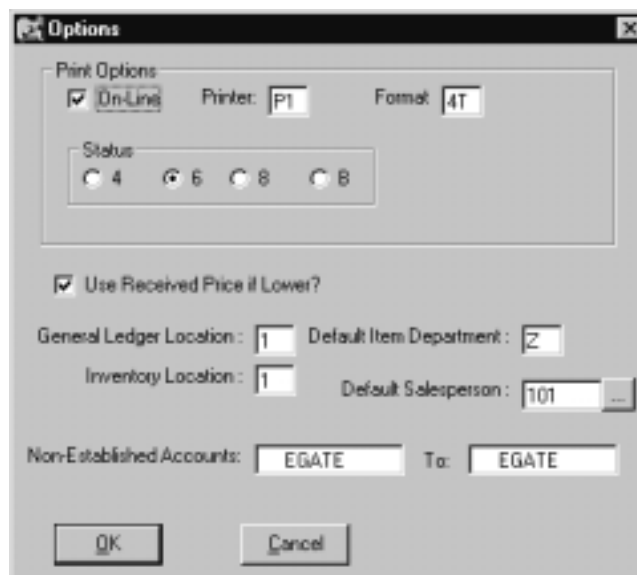
Use the following instructions to set up and use the eGate program:

- 1 From your desktop, click **Start** then select **Programs**.
- 2 From the Programs menu, select **eGate**.
- 3 Enter your order-writer number and press Enter.
- 4 The first time you use eGate, you need to set up the program. To do this, click **Options**.

If this is not the first time you've used eGate, go to **Step 14**.

- 5 The Options window appears, as shown in Figure 4. Select the On-Line check box to if you want to print on-line.
- 6 In the Status window, you can select the status to end the ticket.
- 7 Click the Use Received Price If Lower box if you want the system to use the price on the order, even if it's lower than the selling price on your DDMS system.

**Figure 4: The Options Window**



## Setting Up eGate

- 8 In the General Ledger Location field, enter the location for this order.
- 9 In the Inventory Location field, enter the inventory location for this order.
- 10 In the Default Item Department field, enter the item department that you want your order to default to if this is an uncataloged item.
- 11 The Default Salesperson field is reserved for future use.
- 12 In the Non-Established Accounts boxes, you specify the account or range of accounts that you will use for customers that don't have an account with you. For example, you may have created the customer record EGATE to use with customers that don't have an account. If this is the case, you would enter EGATE in both these boxes, as shown in Figure 4. For more details on creating a generic record for customers that don't have an account, see the heading **What You Need to Set Up**.

The system will print a Bill To Special for any non-established account that you enter in the Non-Established Accounts box. If you leave the Non-Established Accounts boxes blank, the Bill To Special will not print on the ticket. For details on the Bill To Special, see the heading **Viewing the Printed Ticket**.

---

**Note:** You can enter a range of account numbers in the Non-Established Accounts boxes. However, you should be careful when entering a range. If you enter a range, the system will print a Bill To Special for any account (including existing accounts) that falls within the range.

---

- 13 When you have finished setting options, click **OK**.

**Figure 5: The Order File**

P/O Number	Customer Name	Customer #	Dept.	Payment	Total	Lines	Reference #
	United			ccVise	635.58	6	

Prefix	Item Number	Description	Unit	List Price	Sell Price	Quantity
UNV	21200	PAPER,XERO/DUP,WE,LTR,20#	CT	82.00	39.99	3
MMM	654YW	NOTE,POST-IT,3X3,1C/PD,YW	PD	1.27	1.02	2
ENM	IS22	CARTRIDGE,SCANNER,F/4300	EA	69.00	55.20	2
ESS	R152138GR	FOLDER,REINFORCED,LTR,BGN	BX	27.29	21.83	3
ESS	R152130RA	FOLDER,REINFORCED,LTR,OE	BX	27.29	21.83	4
ESS	R15213AST	FOLDER,REINFORCED,LTR,ASST	BX	28.45	22.76	11

Buttons: Send, Exit, F5, G/L Loc:  Inv. Loc:

**14** Click the **Open File** button to select an order file.

---

**Note:** If the customer selected Dealer to Call as the payment option, the system will place the order on hold. This sets the order aside and prevents processing, so that you can call the customer to make arrangements for payment. To determine which orders are on hold, you can run an Open Pick Report in the (T) Order Entry Selectors screen.

---

**15** In the Open window, select an order file to open and click **OK**. (The order file should end with the \*.CMX extension.)

**16** The order file opens and displays all the items on the order. See Figure 5. The file also displays the purchase order number, customer name, customer number, department number, payment type, order total, item prefix, item number, item description, item unit, list price, sell price, item quantity, general ledger and inventory location. To send the order, click **Send**.

If the Select a Valid Account window appears, go to the heading **Retrieving a Customer in eGate**.

**17** When the file has been sent, the Order Successfully Sent message appears.

## Retrieving a Customer in eGate

If the order you choose to send contains an invalid account number, the Select a Valid Account window appears.

Use the following steps to retrieve a customer in eGate:

- 1** At the Select a Valid Account window, click **OK**.
- 2** The Customer window appears.
  - You can scroll through the customer database by clicking **Next**. Go to **Step 4**.
  - To search for a customer, click **Find**. Go to **Step 3**.
- 3** The system displays the Customer Query Window. You can search by customer ID, department number, or customer name. Type the search term you want to use in the appropriate box and press Enter.
- 4** When the correct customer record is highlighted, press Enter to accept the record.
- 5** The system returns to the Customer Window and the customer record that you selected is displayed. Click **Exit** and the system will send your order.

- 6 When the file has been sent, the Order Successfully Sent message appears.

### Viewing the Printed Ticket

A sample ticket is shown on the following page. The following information will print in the body of the ticket:

- 1 The purchase order number from the e-commerce connection will print. The system will automatically add this purchase order number as a long P/O special.
- 2 The Route number will print, only if the route entered at the web site is different from the route number in the header. If the route number in the body of the ticket is different from the route number in the header, you may need to have changes made to your Report Writer format. If you need help with Report Writer, please contact DDMS Support.
- 3 The system prints the Bill To Special for any customer whose account falls within the account(s) you entered in the Non-Established Accounts box. The customer enters a billing address on the order when placing the order on the web site. This billing address will print in the body of the completed ticket.

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**Note:** If you entered a range of account numbers in the Non-Established Accounts box (see **Step 12** under the heading **Using eGate**), the billing address will print for any customer (non-established or existing) whose account number falls within the range.

If you left the Non-Established Accounts box blank and did not enter any account numbers, the system will not print the Bill To Special.

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GLENN'S NT TEST SYSTEM      817-431-0668      12/09/99      151206-0  
 11111      SALESMAN 0113      TIME 16:52:56  
 P.O.BOX 507      WRITER 101 PAGE 1  
 KELLER TX 76248      PHONE 617-366-7001  
 CUSTOMER # 75618 DEPT 1      PREPAID **1** PO #  
 BILLING ADDRESS      PICK TICKET      SHIPPING ADDRESS  
 TEST CUSTOMER      **2** ROUTE # NDS Glenn  
 THIS IS THE SUITE FIELD      22 golf  
 THIS IS THE ADDRESS FIELD  
 CHARLESTOWN 76262      Chicago IL 60631

BIN	LOC	ITEM NUMBER	CO	DESCRIPTION	UNIT	ORDER QTY	B/O QTY	SHIP QTY	UNIT PRICE
			<b>3</b>	Glenn's Company 22 golf	<b>2</b> Route :				
				Chicago IL60631 423424 Buyer Name: Glenn					
		21200		UNV PAPER,XERO/DUP,WELTR,20 RM		3	3		.000
		IS-22		CAN CARTRIDGE,SCANNER,F/4300 EA		2	2		.000
		R15213AST		ESS FOLDER,REINFORCD,LTR,ASS BX		11	11		.000
		R15213BGR		ESS FOLDER,REINFORCED,LTR,BG BX		3	3		.000
		R15213ORA		ESS FOLDER,REINFORCED,LTR,OE BX		4	4		.000
		BRIA 654-YW		MMM NOTE,POST-IT,3X3,1C/PD,Y CT		2	2		.000

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