



# *Setting Up & Using Importer*



eCommerce Industries, Inc.



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## Understanding Importer

Importer is an easy-to-use program from DDMS. It automates the transfer of electronic invoicing files from your PC to your DDMS system. This program was developed to work with DDMS Electronic Invoicing but will work with any program that uses .edi files.

Importer imports EDI files from a PC with a Windows® operating system and translates them to a format DDMS can interpret. The interpreted files are then stored on the DDMS Work Unit specified in the (LØ) Global Parameters screen.

When you use the Importer software from a command line to place a 997 into your DDMS system, DDMS receives the acknowledgment and writes it to the (SGT) EDI Transaction Monitor screen.

When you use the Importer software from a command line to place 810 invoices into your DDMS system, DDMS automatically compares the invoice to the received P/O. The software automatically processes and posts every item whose invoice cost does not vary from the cost on the P/O by more than a percentage or dollar amount that you specify. Any exceptions are flagged for your review. DDMS also posts additional expenses, such as freight charges, to the right G/L accounts and corrects the costs on all customer invoices associated with the P/O.

Invoices can then be posted through the (QR) Accounts Payable Reports screen.

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**Note:** Because Importer relies on information it obtains from your DDMS system, you must maintain constant communication between Importer and your DDMS system when you are using Importer.

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## Package Checklist

- Importer program diskette
- Importer CD-ROM
- 7 foot data cable\* (1)
- CPU module
- Terminal SPX module
- Modem SPX Flow Control module
- Gender changer
- 9–25 pin converter for a PC's serial port
- Importer License agreement.

## Setting Up and Using Importer

\*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.

## System Requirements

To use Importer, you need:

- an IBM-compatible PC with a Microsoft® Windows 95, 98, or Windows NT/2000 operating system
- a serial port on the PC
- an open I/O port on your DDMS system
- the latest version of DDMS software.

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**Note:** To verify the version of software on your DDMS system, in the Master Menu, look at the revision number in the top right-hand portion of the screen. In eNsite Pro, click Help then About eNsite.

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Importer can be set up to work with a modem connection or a network connection.

## Preparing Your System

Before installing Importer, you must prepare your system. You can set up either a modem or a network connection.

### Setting Up a Modem Connection

If your DDMS server and your Importer PC are on a network, you do not need to set up a modem.

To set up a modem connection:

- Connect the hardware
- Determine the TBL port
- Configure the device type
- Define the communications port.

### Connecting the Hardware

You received a data cable with your Importer package. This cable connects your DDMS system to a PC using the appropriate modules. See Figure 1.

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**Note:** Turn off the power to both computers before setting up the hardware.

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To set up your hardware:

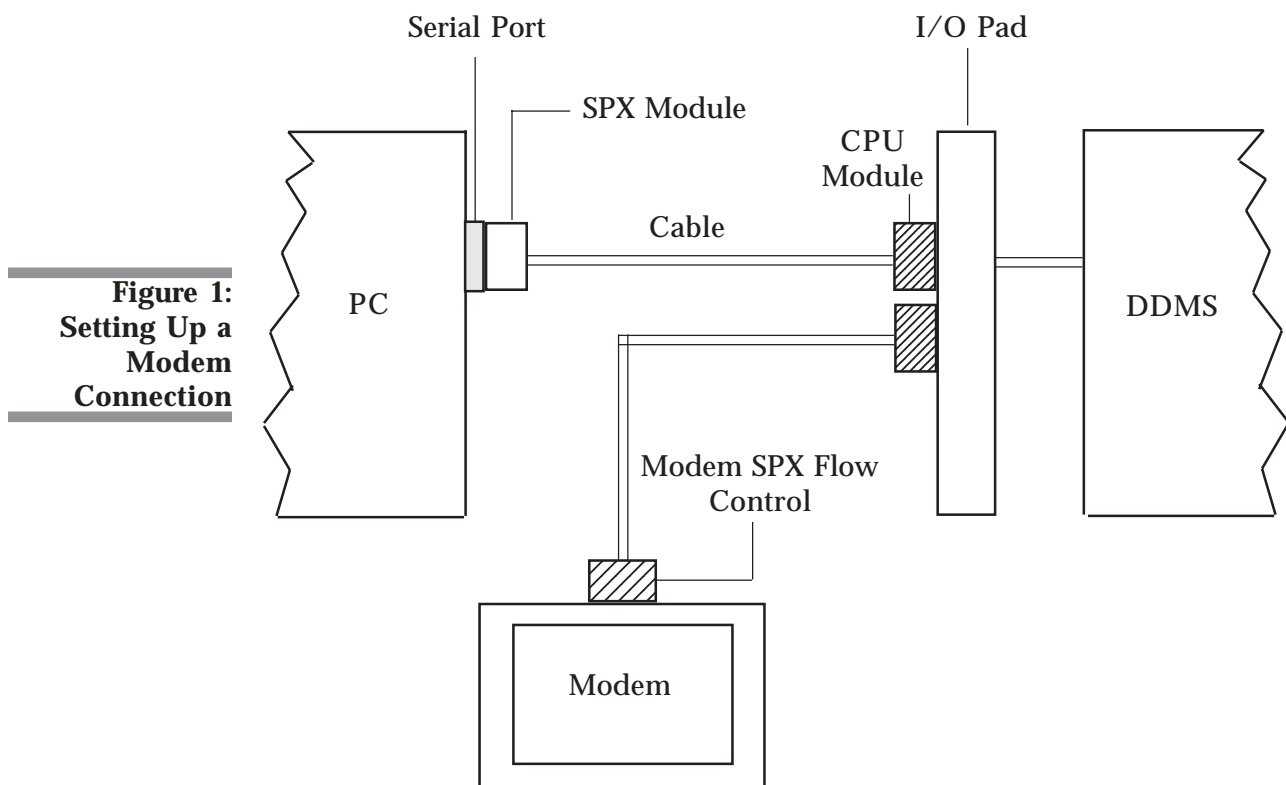
- 1 Attach one end of the data cable to the CPU module.
- 2 Attach the Modem SPX Flow Control module to the other end of the data cable.
- 3 Connect the CPU module to the appropriate port on the I/O pad of your DDMS system.

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**Note:** You must use a port with a large buffer. These are ports 1 through 7 on the first four Specialix I/O pads.

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- 4 Connect the Modem SPX Flow Control module to 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.



**Figure 1:  
Setting Up a  
Modem  
Connection**

### Determining the TBL Port

You must determine the TBL port when configuring your system for a modem connection. Importer will not work if the TBL port is not set up correctly. To determine which port to use for Importer, simply determine which port is available on the Specialix pad you are using.

### Configuring the Device Type

To set up the MW port:

- 1 Open TBLConfig. See Figure 2.
- 2 Right-click Modem Definitions and click Add New.
- 3 The Modem Definitions dialog box opens. In the TBL Name box, type **MW**.

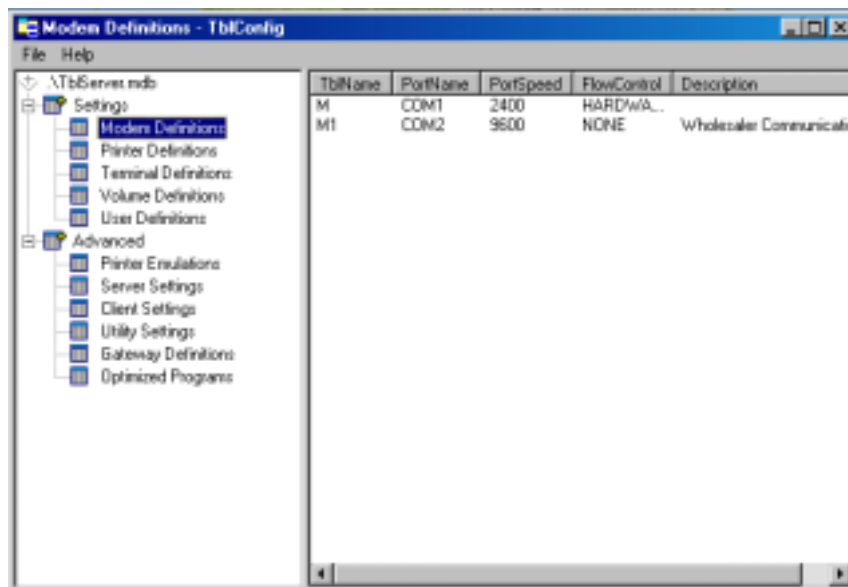
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**Note:** You must type this information in all caps.

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- 4 In the Port Name box, enter the port number to which you connected your cable. For example, if you connected the cable to port number 6, type **COM6**.
- 5 In the Port Speed box, DDMS recommends typing **19200**.
- 6 Use the drop down menu next to the Flow Control box to select Hardware.
- 7 In the Description box, type **IMPORTER**.
- 8 Click OK.

**Figure 2:**  
Configuring the  
Device Type



## Defining the Communications Port

For Importer to work with a modem connection, you must define the communications port in Gateway.

- 1 In TBL Config, double-click Advanced.
- 2 Right-click Gateway Definitions and click Add New.
- 3 The Add/Modify Gateway dialog box opens. In the Gateway Name box, type **IMPORTER**.
- 4 Leave the Gateway Program box set to the default ;NEW:COM.
- 5 In the TBL Port box, type **MW**.
- 6 In the Logical Name box, type **T1**.

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

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- 7 Click the Enable Gateway checkbox to select it.
- 8 Click OK.
- 9 If the information to the right of the name Importer (in the Gateway Definitions dialog box) contains the information MW and TRUE, close the Advanced folder. If not, repeat the above steps.
- 10 Close TBLServer, then restart TBLServer.

## Installing TBLNetCom for Networks

If you are not using Dealer Station, you must install the current version of TBLNetCom on your DDMS server.

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**Note:** You must reboot your DDMS server after this installation. You should do this when you can reboot your DDMS server immediately after the installation.

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Use the following instructions to install or update TBLNetCom on your DDMS server:

- 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. TBLNetCom installation begins.
- 7 At the Software License Agreement, click Yes to accept the agreement.



## Setting Up and Using Importer

- 8 The next prompt lets you choose where to load the Java software. The default path is C:. DDMS recommends that you use the default path.
- 9 Click Next.
- 10 At the Please Enter Your IP Address prompt, type the IP address of your DDMS Server. See Figure 3.
- 11 The Terminal ID prompt appears. Enter your terminal ID for Dealer Station or an ID from the (L1) Terminal and Ticket Parameters screen.

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**Note:** If you have more than one Terminal ID setup for Dealer Station, keep entering them until you are finished. Press Enter to continue. If you don't know if you have more than one Terminal ID, simply enter the one you set up in the (L1) screen.

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- 12 Close all open windows and reboot your computer as usual.

**Figure 3:  
Installing  
TBLNetCom**

```
C:\WINNT\system32>java UpdateIni C:\DDMS\TblNetCom

Cleaning up old logs...
Deleting : C:\DDMS\TblNetCom\logs\DDMS\DDMSErrors.log
Deleting : C:\DDMS\TblNetCom\logs\EGATE\EGATErrors.log
Deleting : C:\DDMS\TblNetCom\logs\TblNetCom\TblNetComErrors.log

Please enter your ip address (form xxx.xxx.xxx.xxx):192.26.36.12
Testing server socket on ip address: 192.26.36.12
ip address accepted

Please enter Terminal ids (form TE - case sensitive)
You must enter at lease 1.
hit ENTER on blank line to stop
Terminal id 0 =
```



## Installing and Configuring Importer

Before you can use Importer, you must:

- Install the software
- Configure your port setup.

### Installing Importer

If you are on a network, you must have the TBLNetCom program from the Importer CD-ROM installed on your server (see the heading **Installing TBLNetCom for Networks**).

- 1 Close all programs on the PC.
- 2 Place the Importer CD in the CD-ROM drive of the PC.
- 3 Click Start, then select Run.
- 4 In the Run window, browse the CD to find Setup.exe. Double-click Setup.exe to start the installation.
- 5 Click Next in each window until you can click Finish to complete the installation.
- 6 Restart the PC. A shortcut for Importer is placed in your Start Menu.

**Figure 5:**  
Setting Up  
Ports

**Communication Port Setup**

Direct Connection

Direct Port: COM1

Baud Rate: 115,200

Modem Connection

Modem Port: COM2

Baud Rate: 19,200

(Optional) Dialing Prefix:

Main Dial String:

Network Connection

Server Port: 8766 DDMS Port ID: MW

Server Address: kyeath2000

Connect

Modem

Direct

Network

OK

Cancel

Test

Check Ports

Help

## Configuring Your Port Setup for Importer


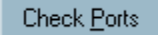
You use the Communication Port Setup dialog box to configure your port settings. You set up this dialog box based on the type of hardware connection you set up:

- Modem Connection
- Network Connection.

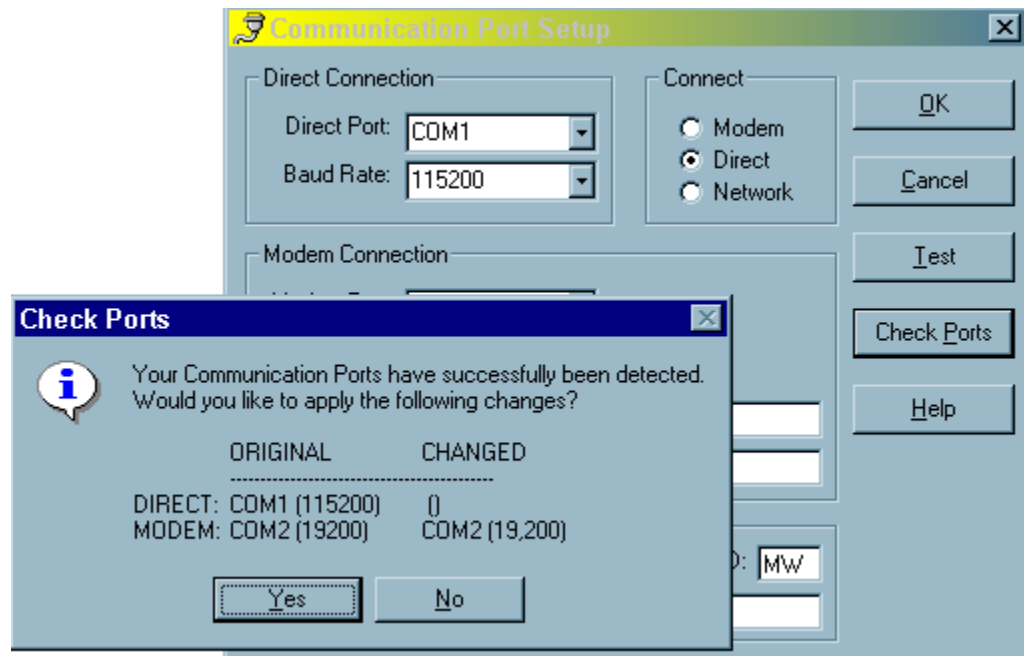
For a modem connection, you can configure the port settings manually or automatically. However, if you're using a network connection, you must manually set up the connection settings.

### Automatically Setting Up Ports for a Modem Connection

DDMS recommends automatically detecting and configuring your ports if you're using a modem connection.

- 1 Click Start then Programs.
- 2 Click Importer.
- 3 When Importer opens, click .
- 4 The Communication Port Setup dialog box opens. See Figure 5. Click . The Communication Test window opens while the communication test is running. When the test is complete, the Check Ports dialog box opens. See Figure 6.

**Figure 6:**  
Automatically  
Setting Up  
Communication  
Settings



- 5 In the Check Ports dialog box:
  - Click Yes to apply the changes to your communication port settings.
  - Click No to keep your old communication port settings.
- 6 The Communication Port Setup dialog box reopens. Test your new connection by clicking **Test**. When the test is complete, the message Communications Test Succeeded appears. See Figure 7. Click OK.

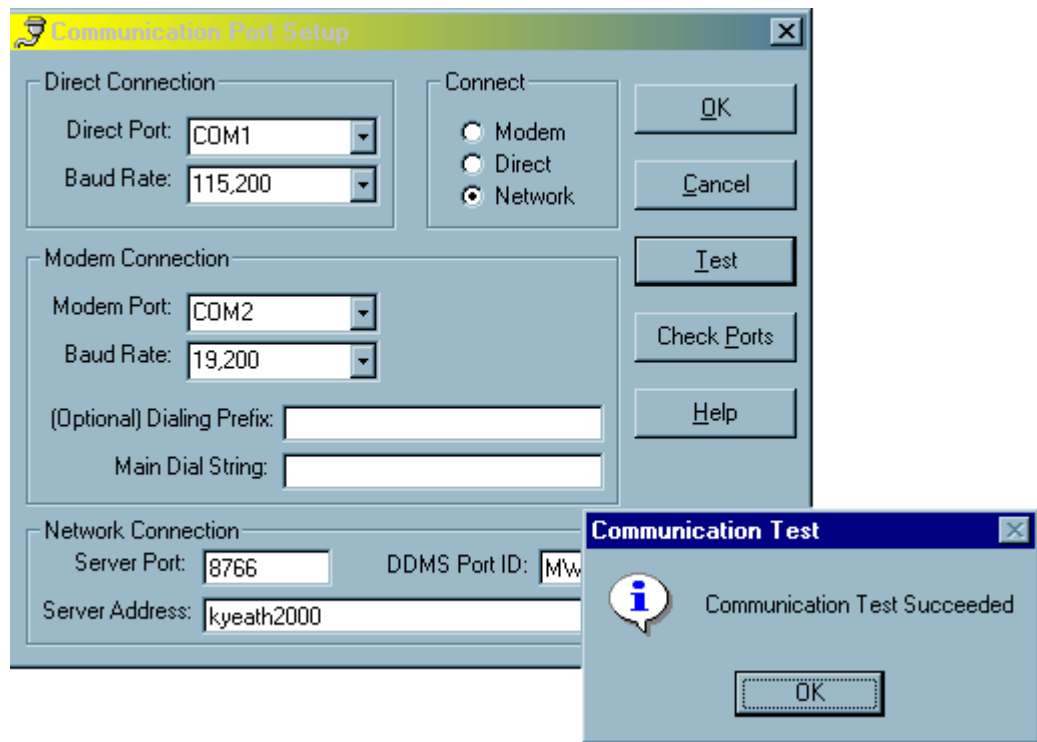
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**Note:** If the test fails, go back through the instructions in this document to make sure the hardware and software have been set up correctly. For example, specifying the wrong baud rate or com port during setup would cause the test to fail. If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


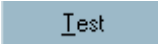
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- 7 Your port setup is now complete. Click OK. You are now ready to begin using the Importer program. Go to the heading **Using Importer**.

**Figure 7:**  
Testing Your  
Port Setup



### Manually Setting Up Ports for a Modem Connection

- 1 Click Start, then click Programs.
- 2 Click Importer.
- 3 When the program opens, click .
- 4 The Communication Port Setup dialog box opens. Under the heading Connect, click the Modem check box.
- 5 Under the heading Modem Connection, you can set up your com port, baud rate, dialing prefix, and main dial string.
  - To set up your com port, click the arrow to the right of the Modem Port check box. Click the name of the com port to which your modem is connected.
  - To set up your baud rate, click the arrow to the right of the Baud Rate box. Click the baud rate of your modem. Remember whatever baud rate you set in this box must match the baud rate set on your DDMS system.
  - 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**.
  - To set up your main dial string, click the Main Dial String box. Enter the phone number for your modem to dial.
- 6 To test your settings, click .
- 7 The Communications Status dialog box opens with the Initializing Port message. When the test is complete, the message Communications Test Succeeded appears. Click Close.

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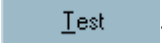
**Note:** If the test fails, go back through the instructions in this document to make sure the hardware and software have been set up correctly. For example, specifying the wrong baud rate or com port during setup would cause the test to fail. If your setup checks out and the test still fails, call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

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- 8 Your modem setup is now complete. Click OK.

## Manually Setting Up Ports for a Network Connection

A network connection requires installation of the TBLNetCom program on your DDMS Server. If you have not installed it yet, refer back to the heading **Installing TBLNetCom for Networks**.

- 1 Click Start, then click Programs.
- 2 Click Importer.
- 3 When the program opens, click .
- 4 The Communication Port Setup dialog box opens. 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.
  - To set up your server port, click the Server Port text box. Enter 8766 as the number of the port you are using on your network server.
  - To set up your server address, click the Server Address text box. Enter the name of the network's address. For example, enter the TCP/IP address or host name of the server you are using, such as 192.9.121.75 or your server name (e.g. DDMS-NT/2000).
  - To set up your DDMS port ID, click the DDMS Port ID box. Type **MW**.
- 6 To test your settings, click .
- 7 The Communications Status dialog box opens with the Initializing Port message. When the test is complete, the message Communications Test Succeeded appears. Click Close.

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**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.

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- 8 Your network setup is now complete. Click OK.

## Using Importer

Once you have set up Importer, you can transfer files. You can use either the:

- Windows operating system interface to transfer one file
- Command line to transfer all files.

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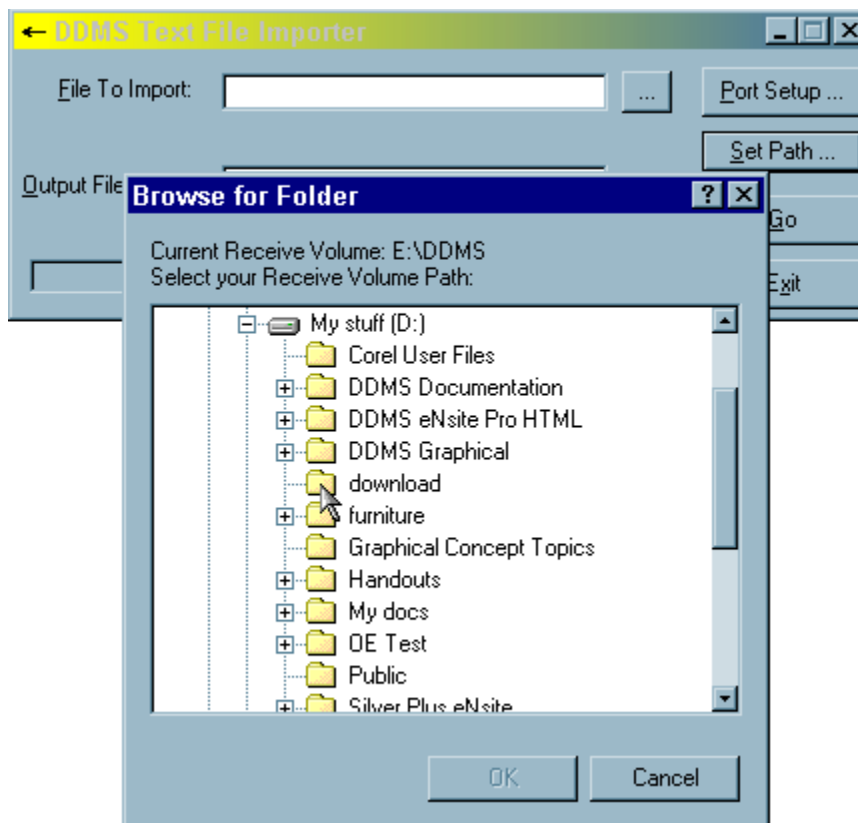
**Note:** DDMS recommends using the command line to run Importer so that all files are transferred and the pre-receive processes run automatically.

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### Using Importer with the Command Line

When you run Importer using a command line, when the job completes the following happens automatically:

- The imported files from the path you set using **Set Path ...** are permanently stored in a date- and time-stamped subfolder (directory) on your Inbound unit (folder). This insures that these files are always available to you.



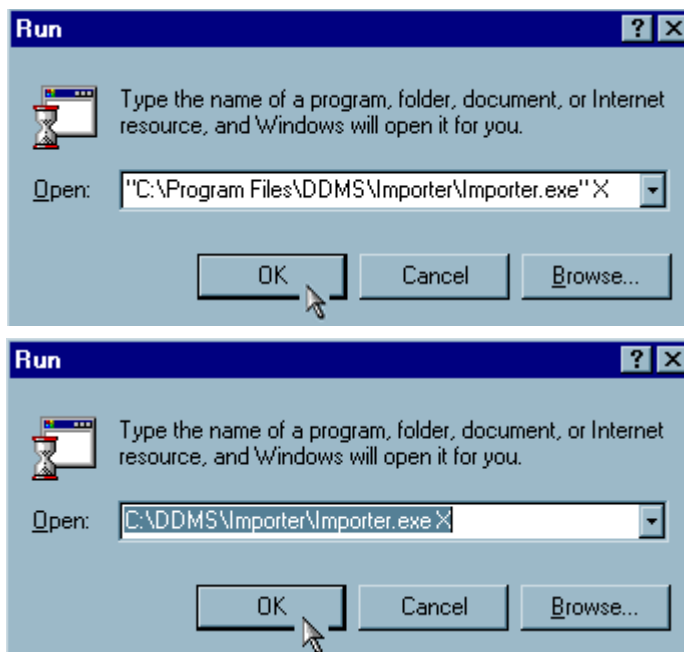
**Figure 8:**  
Setting the Path  
for the  
Permanent  
Receive  
Volume

- 855s are pre-received
- The (SGT) EDI Transaction Monitor screen is updated with the acknowledgment date from 997s
- 810s are translated into electronic invoicing file format so you can process the invoice with the (QRI) Post Electronic Invoices screen.
- Responses are created to 855s, 997s and 810s that were imported and placed in the Outbound unit/folder you specified in the (L6X) screen.


To use Importer to translate files to a format DDMS can process, the files must be on a PC or network drive you can access with Importer. After you retrieve your files and place them on your PC or network, you can use Importer from the command line as follows:

- 1 Open Importer using the icon on your desktop or click Start, then click Programs and click Importer.
- 2 Click **Set Path...** and select the DDMS directory to use as your permanent receive volume. See Figure 8.
- 3 Click OK to save the receive volume you specified.
- 4 Click Exit to close Importer.
- 5 Click Start, then click Run.

**Figure 9:  
Running  
Importer From a  
Command Line**



## Setting Up and Using Importer

- 6 Type the path to Importer.exe. (This is the path to the unit you created to receive EDI files and set using  in Importer. It should be the default install path unless you changed it during installation.)

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**Note:** If any name in the path contains a space, you must enclose the entire path name in quotation marks. For example, “C:\Program Files\DDMS\Importer\Importer.exe”.

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- 7 Type one space after the path then type X. See Figure 9.

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**Note:** The X causes Importer to retrieve all the files in the Inbound unit or folder.

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- 8 Click OK.


- 9 The Importer icon appears in the lower right corner of your screen (system tray). You can hover your mouse over the icon to get the status of the Importer job. The icon disappears when the job is complete.

## Using Importer with the Windows Interface

When you run Importer using the Windows interface:

- The file you specify in the Importer File To Import box is transferred to your DDMS work unit with the file name you specify in the Importer Output File Name box.
- You must manually:
  - Pre-receive 855s in the (SGC) Process Received File screen
  - Update the (SGT) screen with the acknowledgment date from 997s
  - Translate 810s into invoicing file format so you can process them with the (QRI) screen
  - Create responses to 855s, 997s and 810s and place them in the Outbound unit/folder you specified in the (L6X) screen.

To translate files to a format DDMS can process, the files must be on a PC or network drive you can access with Importer. After you retrieve your files and place them on your PC or network, you can use Importer with a Windows operating system as follows:

- 1 Open Importer using the icon on your desktop or click Start, then click Programs and click Importer in the program list.
- 2 Click  next to the File to Import box to search for the file to process.

- 3 Find the file and double-click the file name to select it. See Figure 10.
- 4 Click the Output File Name box and type a name for the file Importer saves on your DDMS Work Unit.

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**Note:** Importer saves files on the DDMS Work Unit you specify in the (LØ) screen.

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- 5 Click Go. The file is translated and stored on your DDMS Work Unit with the name you specified in the Output File Name box.
- 6 Repeat steps 1 through 5 to translate another file, or click Exit to close Importer.

**Figure 10:**  
Selecting the  
File to Import

