



*Setting Up and Using
Steelcase® Hedberg
System™ Communications*



eCommerce Industries, Inc.



April 2006 Item # H-HEDBERG

Contents

Understanding Hedberg Communications	3
Getting Started	3
Set Up Performed by Hedberg	3
Setting Up Ensight Pro	4
Setting Up the Customer Database	4
Setting Up the Vendor Database	6
Setting Up the Salesperson Database	6
Creating Furniture Hedberg Orders in Ensight Pro	7
Reprocessing a Hedberg Order	9
Receiving Hedberg Acknowledgments in Ensight Pro	10

Understanding Hedberg Communications

You can create furniture orders by importing and releasing Hedberg files into Ensite Pro. This process allows you to send your furniture sales through the same order and accounting flow as other transactions. When you finish creating the order, the P/O is automatically built using the same P/O number as in Hedberg. By having the P/O in Ensite Pro, you can view project management information for this order. In addition, because the P/O exists in Ensite Pro, you can also receive it in Furniture Order Entry so that you can ship it.

Before you can use Hedberg, there are certain steps you must complete, including:

- Contact ECI² Sales to purchase the DDMS Hedberg Interface
- Wait for Hedberg Data Systems to provide a license key
- Set up the Customer, Vendor, and Salesperson databases in Ensite Pro

These instructions below detail how to set up Hedberg communications for use with Ensite Pro.

Getting Started

The ECI² Sales team will assist you in purchasing the DDMS Hedberg Interface. After your information has been processed and confirmed, the ECI² Accounting Department notifies Hedberg of your purchase.

Note: You should **not** contact Hedberg for authorization or a license key.

Set Up Performed by Hedberg

First, Hedberg begins by creating a folder where the Hedberg purchase orders and acknowledgments will be loaded from the Hedberg system. The path for this folder is stored on the Ensite Pro server and is called:
C:\DDMS_EXPORT.

Note: If you use a web version of Hedberg software, you are responsible for creating the folder where the Hedberg purchase orders and acknowledgments will be stored.

Next, Hedberg places a test purchase order and a test acknowledgment in the C:\DDMS_EXPORT folder to be sure that the set up has been correctly performed.

Setting Up and Using Steelcase® Hedberg System™ Communications

Afterwards, Hedberg sends you the following e-mail message:

We have been informed by ECI² that you purchased the DDMS Hedberg Interface.

In order to use Hedberg, you will need a license key. The license key for your dealership is #####. You will be prompted for the key the first time you access Create DDMS Orders. For Hedberg Enterprise dealers, you will find the program on the Standard Import/Export Menu in System Utilities. For Express dealers, the program is located in Order Options from the Express menu.

The required folder is set up automatically for dealers who are operating stand-alone Hedberg applications. For dealers on the web, you need to set up a directory C:\DDMS_EXPORT on your local PC.

Please refer to the online help for assistance or contact our Customer Support Team at 860.758.9010 or support.hedberg@steelcase.com.

Setting Up Ensite Pro

To get started on Ensite Pro, ECI² authorizes you for Hedberg using the (Z) System Utilities screen. Once your authorization is complete, you must set up your Customer, Vendor, and Salesperson databases for use with Hedberg.

Setting Up the Customer Database

You must set the Cross Reference box in the Customer Order Entry tab for each customer with whom you plan to use Hedberg.




**Figure 1:
The Cross
Reference Box
in the Customer
Order Entry Tab**

The screenshot shows a software window titled "Customer: 936 () ACME RUBBER". The window has a menu bar with "File", "View", and "Help". Below the menu bar is a toolbar with various icons. The main area is divided into several tabs: "Master", "Ship to/Attention", "Buyers/Manifest", "Order Entry" (which is selected), "Credit", and "Machines".

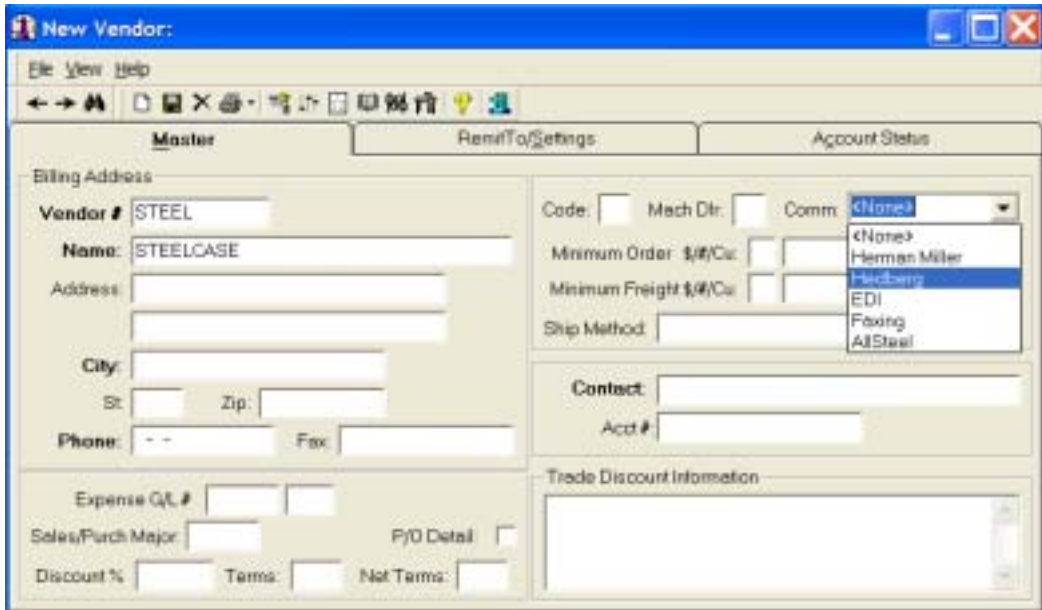
In the "Order Entry" tab, there are several sections of controls:

- Cross Reference:** A checkbox labeled "Cross Reference:" is checked. To its right are checkboxes for "PrePay?" and "Exempt from Min. Order Charges".
- Additional Volume Discount Plan:** A checkbox is unchecked. To its right are checkboxes for "Statement Exempt?" and "Skip Card Validation".
- Default Credit Card Cust. Ref. ID:** A dropdown menu is set to "Order #". To its right is a checkbox for "Two Decimal Place Pricing".
- Order Entry Setting:** A section with a "Location:" dropdown set to "1". It contains various checkboxes and text boxes:
 - "Taxable?" is checked (Y).
 - "District:" is "4444".
 - "Remote ID:" is empty.
 - "Laundry List ID:" is empty.
 - "Status O/E:" is "G".
 - "B/D's Allowed?" is unchecked.
 - "Substitutes Allowed?" is unchecked.
 - "P/O Required?" is unchecked.
 - "O/E Exempt?" is checked (B).
 - "TM1:" is empty.
 - "TM2:" is checked (Y).
 - "Contracts:" has buttons for "Q2", "P2", and "1T".
 - "Column Breaks:" is "N".
 - "Best Pricing?" is checked (Y).
 - "Discount Type:" is "5".
 - "Percent %:" is "10.0".
 - "Hold Type:" is empty.
 - "Days:" is empty.
 - "Cost Code:" is "M".
 - "Cost Plus if Net?" is unchecked.
 - "Percent Up from List %:" is empty.
 - "Catalog Price?" is unchecked.
 - "Hold Invoices?" is unchecked.
 - "Invoice Copies:" is empty.
 - "Invoice Format:" is empty.
 - "Pick Ticket Format:" is empty.

Setting Up and Using Steelcase® Hedberg System™ Communications

- 1 From the Ensite Pro Master Menu, double-click . The Customer window opens, displaying the information for the last customer selected.
- 2 Retrieve the customer for which you want to set up Hedberg information. You can retrieve customers by account number, name, and phone number. You can also search for customers by clicking .
- 3 Once the customer is retrieved, click the Order Entry tab.
- 4 Enter the cross reference number in the Cross Reference box. See Figure 1. This box contains the interface number to be used with Hedberg accounts. When importing a Hedberg order, the system checks this box. To import Hedberg orders successfully, this box must contain the account number. If this box is blank, you will receive an exception message in Order Entry. You can obtain this number from Steelcase/Hedberg.
- 5 Click  to save your changes.

**Figure 2:
Setting Up the
Comm Box in
the Vendor
Master Tab**



The screenshot shows the 'New Vendor' window with the 'Master' tab selected. The 'Billing Address' section contains the following fields:

- Vendor #: STEEL
- Name: STEELCASE
- Address: [Empty]
- City: [Empty]
- St: [Empty] Zip: [Empty]
- Phone: -- [Empty] Fax: [Empty]

The 'Comm' dropdown menu is open, showing the following options:




- <None>
- Herman Miller
- Hedberg (Selected)
- EDI
- Faxing
- AllSteel

Other visible fields include:

- Code: [Empty] Mech Dir: [Empty]
- Minimum Order: \$/#/Cu: [Empty]
- Minimum Freight \$/#/Cu: [Empty]
- Ship Method: [Empty]
- Contact: [Empty]
- Acct #: [Empty]
- Expense GL #: [Empty]
- Sales/Purch Major: [Empty] P/O Detail: [Empty]
- Discount %: [Empty] Terms: [Empty] Net Terms: [Empty]


Setting Up the Vendor Database

You must set the Comm box in the Vendor Master tab and the Cross Reference box in the Vendor Remit To/Settings tab for the Steelcase vendor.


- 1 From the Ensite Pro Master Menu, double-click . The Vendor window opens, displaying the information for the last vendor selected.
- 2 Retrieve the Steelcase vendor. You can retrieve vendors using the vendor's account number, name, city and phone number. You can also search for vendors by clicking .
- 3 Once the Steelcase vendor is retrieved, click the down arrow in the Comm box and select Hedberg. See Figure 2. (This box is also called the Comm Type box.) This box specifies the communication link between the vendor and the wholesaler or manufacturer. By selecting Hedberg, the parameters for this vendor are automatically set to communicate with Hedberg, according to their file transmission preference.
- 4 Click the Remit To/Settings tab.
- 5 Click the Cross Reference box and enter your Hedberg vendor number. This number lets your Ensite Pro system interface with Hedberg software. When you import a Hedberg order in Furniture Order Entry, the system checks the vendor's cross reference number that you set in this box. If you leave this box blank, the system logs an error to the Exceptions file and you cannot import or release Hedberg orders.
- 6 Click  to save your information.

Setting Up the Salesperson Database

You must set up the Cross Ref# box in the Salesperson Master tab for use with Hedberg. If the salesperson you plan to use with Hedberg has not yet been added to the database, you must add the salesperson first. Then assign it the Hedberg cross reference number. Use the following instructions.

- 1 From the Ensite Pro Master Menu, double-click . The Salesperson window opens, displaying the information for the last salesperson selected.
 - If the salesperson has already been added to the database in Ensite Pro, retrieve the salesperson number plan to use with Hedberg. For instructions on retrieving salespersons, see your online documentation. Go to **Step 2**.

The SalesPerson #, Name and Cross Ref# boxes are the only boxes you must complete to add the Hedberg salesperson. You can use the remaining boxes to specify additional information.

- If the salesperson number you plan to use with Hedberg does not exist in the database, you must add the Hedberg salesperson. To do so, click . The boxes are cleared. Click the SalesPerson # box and enter the salesperson number. In the Name box, add the salesperson's name.
- 2 Click the Cross Ref# box and enter your Hedberg salesperson number. You can enter up to six characters in this box. This number lets your system interface with Hedberg software. The Cross Ref# box was added to comply with changes made to the Hedberg system that require salesperson numbers of at least five characters.

When you import a Hedberg order in Furniture Order Entry, the system checks the salesperson's cross reference number that you set in this box. If you leave this box blank, the system logs an error to the Exceptions file and you cannot import or release Hedberg orders.


- 3 When you finish, click  to save your changes.

When you create Furniture Hedberg orders and build the P/O, the system creates the REFPAT order entry record and the REFPAA purchase order entry record for Hedberg in the V-ORDER file.

Creating Furniture Hedberg Orders in Ensite Pro

Use these instructions to create furniture orders by importing and releasing Hedberg files into Ensite Pro. For each Hedberg order that you want to create in Ensite Pro, there will be a text file in the folder that Hedberg created. The first line of this text file will read as follows: TRTYPE=PO.

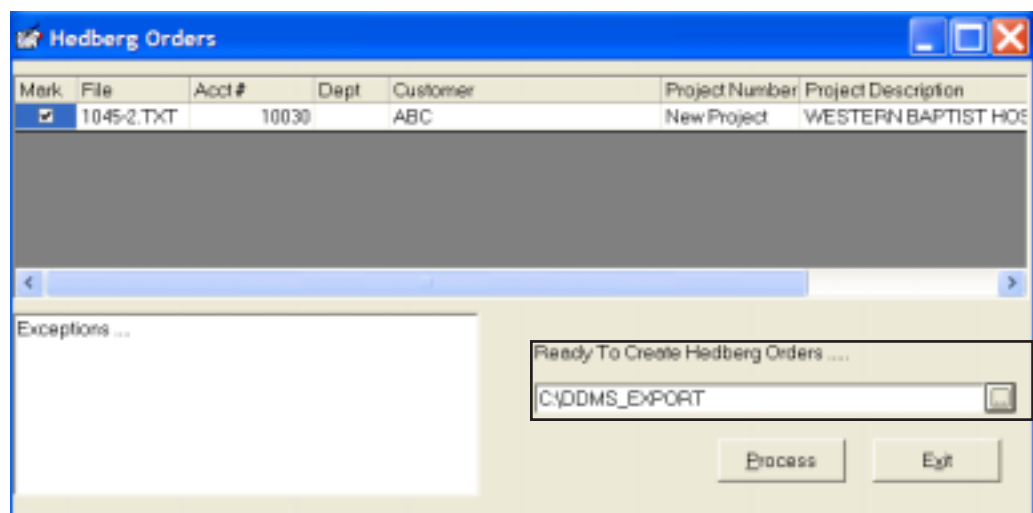
When you create Hedberg orders, the system defaults to release the order to a new project. However, you also have the option of importing and releasing the Hedberg order to an existing project, if desired.

- 1 Double-click  .
- 2 If the Order Style list box does not default to Furniture, click the down arrow and click Furniture.
- 3 If the Action Code list box does not default to order, click the down arrow in the Action Code list box and click Order.
- 4 Click the Order Entry menu and select Hedberg Orders. The Furniture Hedberg Orders dialog box opens, listing available Hedberg orders.

Setting Up and Using Steelcase® Hedberg System™ Communications


- 5 Click in the Path box. See Figure 3. The Browse for Folder dialog box opens. Browse for the folder location provided by Hedberg. This sets the path for the Hedberg orders to be processed by Ensite Pro.
- 6 The system displays the orders in the upper section of the dialog box. If the order you want to import is not checked, click the Mark box for each order you want to import.
- 7 The Project Number box defaults to New Project. To release the Hedberg file you're importing to an existing project, click the Project Number box corresponding to the order you want to release to an existing project.
- 8 Click the button to open the Project Query dialog box. Select the project to which you want to release the Hedberg order.
- 9 When you're ready to import the files you have selected, click Process. The Processing Hedberg File message appears while the items are imported.
- 10 The system moves the items from the file to a Furniture order, displaying them in the Item Detail tab. At this point, you can change item information just as you would regular items.
- 11 When you finish, click the Order Totals tab.
- 12 If you have add-on items set up in the (LGC1) Furniture Add On Item Parameters screen, the items are automatically added to the order (if the items are required) or the Furniture Add On Items dialog box opens so you can select the items you want to add to this order. To add items to

**Figure 3:
The Path Box in
the Hedberg
Orders Dialog
Box**



Setting Up and Using Steelcase® Hedberg System™ Communications

the order enter the quantity of each item you want to add in the Qty box. For example, to add one freight charge, type 1 in the Qty box corresponding to the freight item. When you finish adding items, click OK. If you do not want to add items to the order, click Cancel.

- 13 The Order Totals tab opens. Click  or press F6.
- 14 At the Changes to Global Order Settings message, click Yes to apply the changes to the entire order.
- 15 The Order Settings dialog box opens. Click the Primary Salesperson box and select the salesperson for the entire order. Be sure to select the salesperson's original number. This ensures that all history and commission information remains under the proper number.

Note: Any changes you make in the Order Settings dialog box apply to this order only.

- 16 Click Accept Order. The order is ended at the status you selected. Unless you indicated not to print any pick tickets, the number of pick tickets you entered print. In addition, the pick tickets are faxed or e-mailed if you so specified. The cursor returns to the Global tab.

Note: The text file used to import the Hedberg order into Ensite Pro is moved from its original location, such as C:\DDMS_EXPORT, into a dated folder within the original location. For example, if 1045-1.txt is processed on November 30, 2005, it is moved to C:\DDMS_EXPORT\113005.

Reprocessing a Hedberg Order

If necessary, you can reprocess Hedberg orders.

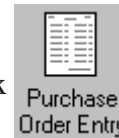
- 1 Delete the existing purchase order in Purchase Order Entry. If you need instructions for deleting purchase orders, refer to your online documentation.
- 2 Move the text file from the dated folder back to its original location. Using the same example, move the file from C:\DDMS_EXPORT\113005 to C:\DDMS_EXPORT.
- 3 Follow the instructions in the previous heading **Creating Furniture Hedberg Orders in Ensite Pro** to reprocess the Hedberg order.

Receiving Hedberg Acknowledgments in Ensite Pro

Once you have created a Hedberg order and the corresponding purchase order in Furniture Order Entry, you can also view and receive the Hedberg acknowledgment in Purchase Order Entry. Receiving the Hedberg acknowledgment allows you to update the P/O with the appropriate acknowledgment number(s).

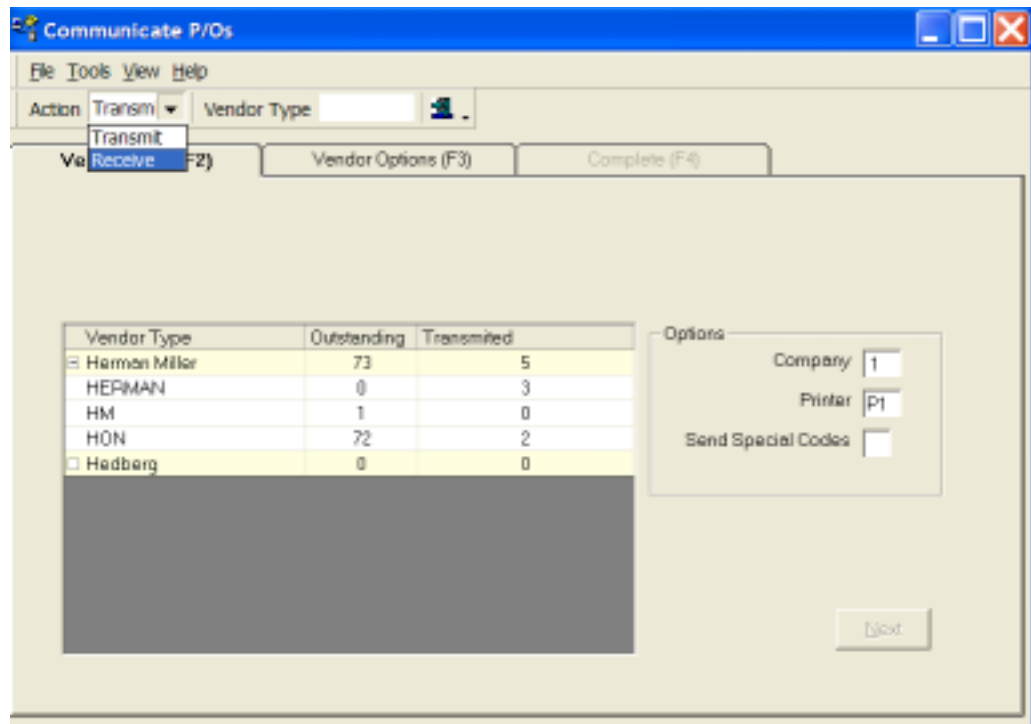
For each Hedberg acknowledgment that you want to receive in Ensite Pro, there will be a text file in the folder that Hedberg created. The first line of this text file will read as follows: TRTYPE=AK.

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




- 2 Click the down arrow in the Action Code box and click Communicate.
- 3 The Communicate P/Os dialog box opens. Click the down arrow in the Action box and click Receive, as shown in Figure 4.
- 4 In the Vendor Info (F2) tab, click Hedberg from the Vendor Type list.
- 5 Click the Receive (F5) tab.

Figure 4:
Selecting to
Receive
Purchase Orders



Setting Up and Using Steelcase® Hedberg System™ Communications

- 6 Once the Receive (F5) tab opens, click the  button to the right of the Ack Path box, as shown in Figure 5. This allows you to browse for the same folder Hedberg used to create the purchase orders.
- 7 If you want to automatically print the acknowledgment after you receive it, click the Print Acknowledgments After Receiving check box.
- 8 At this point, you can first view the acknowledgment before receiving it, or you can receive the acknowledgment.
 - To view an acknowledgment before receiving it, click the View button. (You also have the option of viewing the acknowledgment without receiving it.)
 - To receive the acknowledgment without viewing it first, click the Receive button.
- 9 When the Acknowledgment (F6) tab opens, you can receive the acknowledgment.
 - If you selected to view the acknowledgment first, click the Receive button. This updates the P/O with the acknowledgment number. However, this does not final receive the P/O.
 - Click the Print Ack button to print the acknowledgment. (If you selected the Print Acknowledgments After Receiving check box in the Receive (F5) tab, this step is unnecessary.)

**Figure 5:
The Ack Path
Box**

