

*Global PSN and
TeamDesign*



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Understanding PSN

Private Supply Network (PSN) opens a new world of interactive possibilities. It connects dealers to trading partners via the Internet. You can use PSN to transmit purchase orders and receive acknowledgments from vendors. The always-on connection is both fast and reliable. What's more — PSN is free. There are no setup fees or transaction charges.

Not only is PSN free, it's easy, too. Just load the latest software, set up a few identifiers, passwords and go. Once you've set up your system for PSN, it's invisible. There is no learning curve, no instructions to follow — just process purchase orders using the Transmit Purchase Order via PSN window and let the software take care of the rest.

Note: *You must sign up for PSN before performing the steps in this handout. Once you sign up for PSN, do not perform these steps until you have executed the steps listed in the handout *Phase I: Setting Up PSN*. This handout is available at www.team-design.net/psn.php.*

Before You Begin

Install the following, using the appropriate software instructions:

- ADS Version 8.10.27 or greater.
- Software version 14 or greater TeamDesign.
- Install the latest PSN Communication Service, which can be found on your TeamDesign CD. You can also visit <http://www.team-design.net/newpsn.php> for installation documentation.
- Sign up for ECi PSN. If you are not currently using the ECi PSN, you can set up an account using the online form on the Starting a New PSN Account page at <http://www.team-design.net/newpsn.php>. If you are already using the ECi PSN, you can simply add *TeamDesign* to your existing PSN account by following the setup instructions in this handout.

Setting Up TeamDesign

Setting up to transmit purchase orders to Global using PSN involves:

- 1 Contacting Global.
- 2 Setting up the PSN Comm tab in the System Configuration window.
- 3 Setting up the input and output paths in the PSN Setup window.
- 4 Updating/Creating a Global vendor in the Vendor Profile Internal Usage tab.

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- 5 Setting up the Ship To Profile window.
- 6 Creating the proposal.
- 7 Creating the purchase order.
- 8 Transmitting the built P/O to Global using PSN.

The Dealer ID number is the account number assigned to you by Global.

To delete a dealer ID, click the ID to highlight it. Click Delete Selected Dealer ID.

Contacting Global

Contact Global to receive details for your Global and OfficesToGo accounts:

- Your Dealer Login ID and Password.
- Your account numbers. (You may have several different account numbers if you have separate physical locations or if you offer different contract levels.) You need these numbers to set up your PSN communication options.
- Global contract numbers. (In TeamDesign, the Global contract numbers are entered in the proposal profile in the Purchase Orders tab.)

Figure 1: The PSN Comm Tab

TEAM-DESIGNI® / V14 DOCS TRAINING DATA (Version: 14.02.23) - [SYSTEM CONFIGURATION]

File Edit View Tables Masters Window Help

Customers Projects Proposals Proposal Reports Vendors Purchase Orders Inventory Ledger

Company Profile Environment General Ledger Payables Proposals Purchase Orders Receivables

Other Modules Commissions Haworth PSN Comm Miscellaneous User-Defined

Select Manufacturer: Global Industries

PSN Dealer Description

Dealer Name
Address Line 1
Address Line 2
City
State/Province
Postal Code
Contact Name
Phone Number
E-Mail Address

Update Item Costs with Electronic Acknowledged Cost?
 Always Ship Complete?

Dealer IDs

Add New Dealer ID:
None Found
None Found

Set as Default Dealer ID
Delete Selected Dealer ID

Save Changes


TEAM-DESIGNI® 10:27:10

Setting Up the System Configuration Window

Setting up the System Configuration window is a required step. You must complete all the information in this window. The address you specify here is used by Global as the default billing address. This is the address Global uses to send invoices.

- 1 From the TeamDesign menu, click System > SetUp> System Configuration.
- 2 The System Configuration window opens, defaulting to the Company Profile tab. Click the PSN Comm tab, as shown in Figure 1.
- 3 Click the down arrow in the Select Manufacturer box and choose the appropriate manufacturer.
- 4 The PSN Dealer Description boxes include the Dealer Name through Update Item Costs With Electronic Acknowledged Cost box. Click each box and enter the information.

Note: The system uses the information in the Contact Name, Phone Number, and E-Mail Address boxes as the default when transmitting P/Os in the Transmit Purchase Orders via PSN window.

- 5 Click the Add New Dealer ID box. Enter the account number you received from Global. Press Enter. Continue to add as many account numbers as needed. You may need to add multiple account numbers if you have separate physical locations or if you offer different contract levels.
- 6 Click the dealer identification code most frequently used as the default when transmitting P/Os to Global. When the correct ID is highlighted, click Set as Default ID.
- 7 When you finish adding dealer IDs, click Save Changes.
- 8 At the Dealer Information Was Successfully Saved message, click OK.
- 9 Click . The window closes and your changes are saved.

Setting Up the Output and Input Paths

Once you have contacted Global, set up your output and input paths. The output and input paths you specify must be on a network drive. We suggest you use drive T.

- 1 From the TeamDesign menu, click System > Setup > PSN Configuration.

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- 2 The PSN Configuration window opens. See Figure 2.

Full Output Path: Use this box to enter the path where your outbound temporary files are stored. These files are small and are deleted when the P/O is transmitted. We recommend you use the path T:\PSNOUT.


Full Inbound Path: Use this box to enter the path where your inbound temporary files are stored. We recommend you use the path T:\PSNIN.

Note: If you have a Netware server, you have installed the PSN service locally. The Server IP Address and Company ID boxes appear. These boxes default to: <http://www.privatesupplynetwork.com/psn.asp>. Your company ID is a number assigned by TeamDesign. Once you have registered for PSN services, do not change the IP address or Company ID unless instructed to do so by TeamDesign.

- 3 When you finish, click Okay.

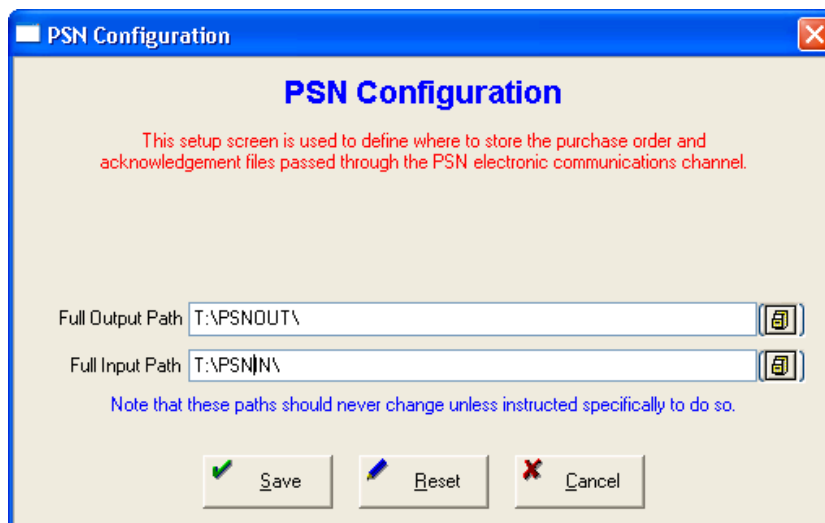
Updating/Creating a Global or OfficesToGo Vendor


- 1 From the TeamDesign menu, click Vendors > Maintenance.
- 2 In the Vendor List window, double-click the Global and/or OfficesToGo vendor.

Note: If the Global vendor does not exist in your system, click  to add a new vendor. For details on adding new vendors, see your TeamDesign online documentation.

- 3 In the Vendor List window, click Profile.

Figure 2: The PSN Configuration Window




- 4 In the Vendor window, click the Internal Usage tab.
- 5 In the PSN Communications section of the tab, click the down arrow in the PSN Mfg ID box. Select your dealership name. See Figure 3.
- 6 Click . The window closes and your changes are saved.

Setting Up the Ship To Profile Window

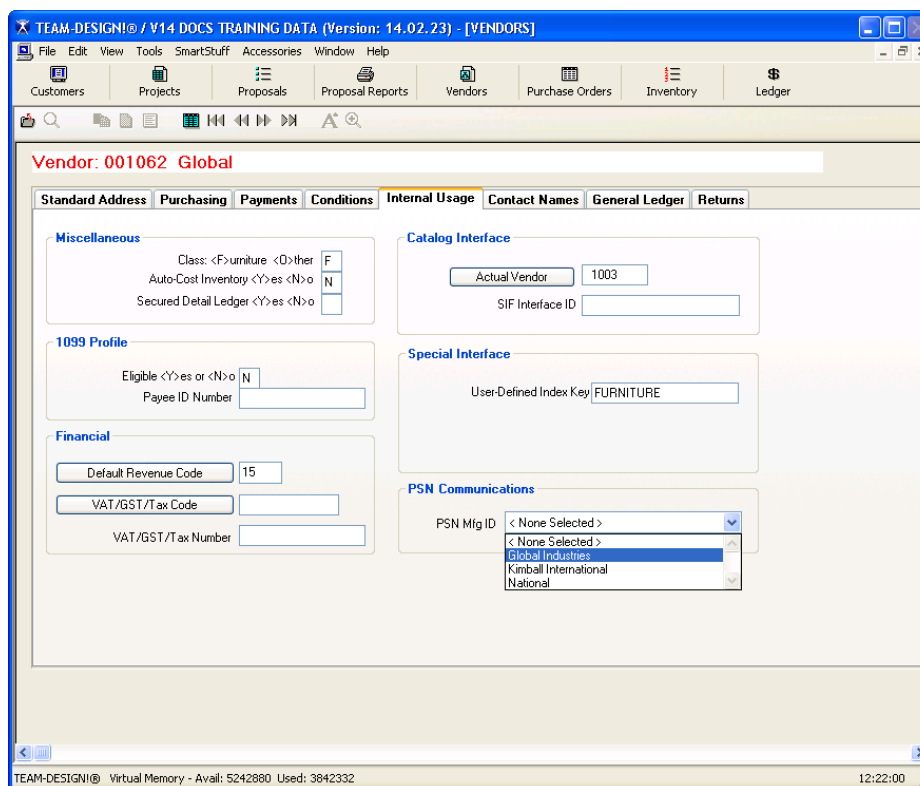
This process lets you enter a complete ship-to address. Global does not require a ship-to account number.

- 1 From the TeamDesign menu, click Tables > ShipTo Addresses.
- 2 In the ShipTo Address List window, double-click the address, confirming you have valid ship to address information.

Note: You can also add a new address by clicking . For details on adding shipping addresses, see your TeamDesign online documentation.

- 3 Click . The window closes and your changes are saved.

Figure 3: The Internal Usage Tab





The screenshot shows the 'Internal Usage' tab for Vendor 001062 Global. The interface is divided into several sections:

- Miscellaneous:** Contains fields for Class (F), Auto-Cost Inventory (N), and Secured Detail Ledger (N).
- 1099 Profile:** Contains fields for Eligible (N) and Payee ID Number.
- Financial:** Contains fields for Default Revenue Code (15), VAT/GST/Tax Code, and VAT/GST/Tax Number.
- Catalog Interface:** Contains fields for Actual Vendor (1003) and SIF Interface ID.
- Special Interface:** Contains a field for User-Defined Index Key (FURNITURE).
- PSN Communications:** Contains a dropdown menu for PSN Mfg ID, with 'Global Industries' selected.

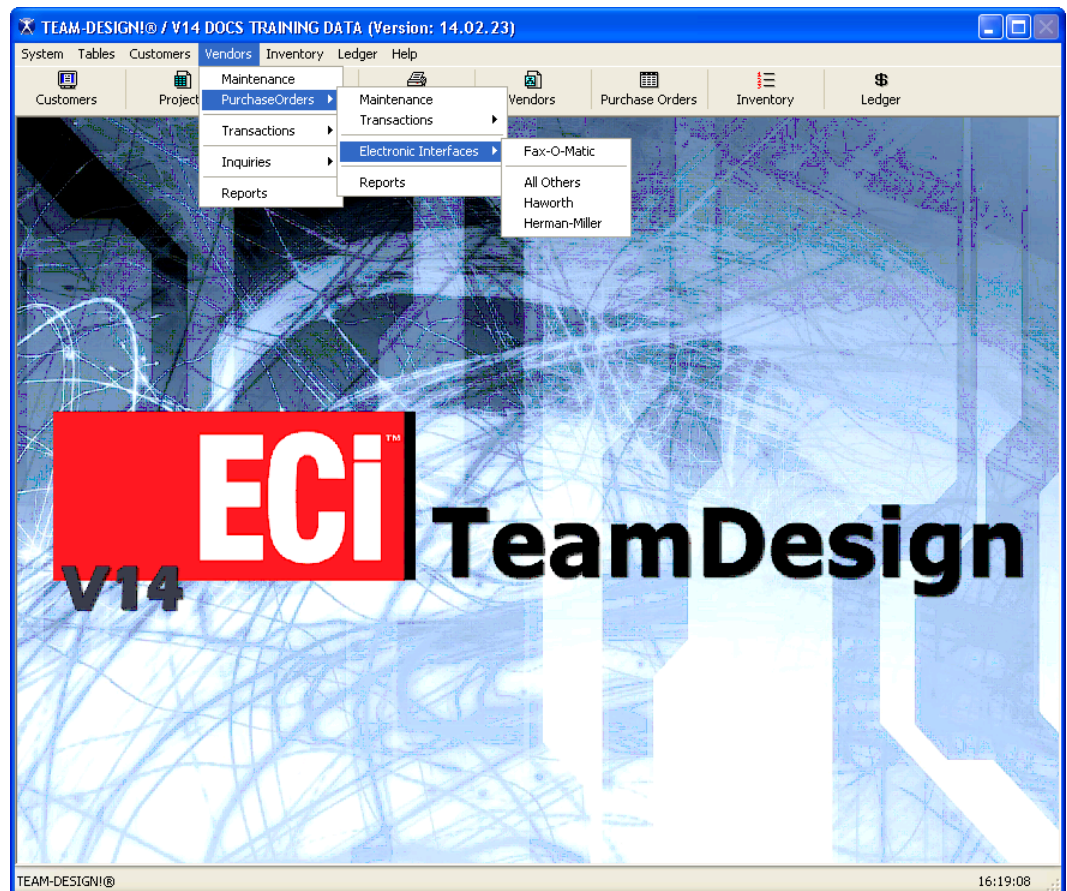
The status bar at the bottom indicates: TEAM-DESIGN!® Virtual Memory - Avail: 5242880 Used: 3842332 12:22:00

Creating the Proposal

- 1 From the TeamDesign menu, click Customers > Proposals > Maintenance.
- 2 To add a new proposal click .
- 3 In the Create Proposal window, enter the information for this proposal.
- 4 When you finish, click Okay.
- 5 Complete the proposal as you normally would. When you finish, click  to save your changes. (For more information on creating proposals, see your TeamDesign online documentation.)

Note: To ensure items are specified properly, it is best practice to use a specifier (CAP, ProjectSpec, and so on) before importing into a TeamDesign proposal. This is especially true for specials, as information is contained in the description that allows Global/OfficesToGo to properly process the order.

Figure 4:
Selecting the All
Others Option



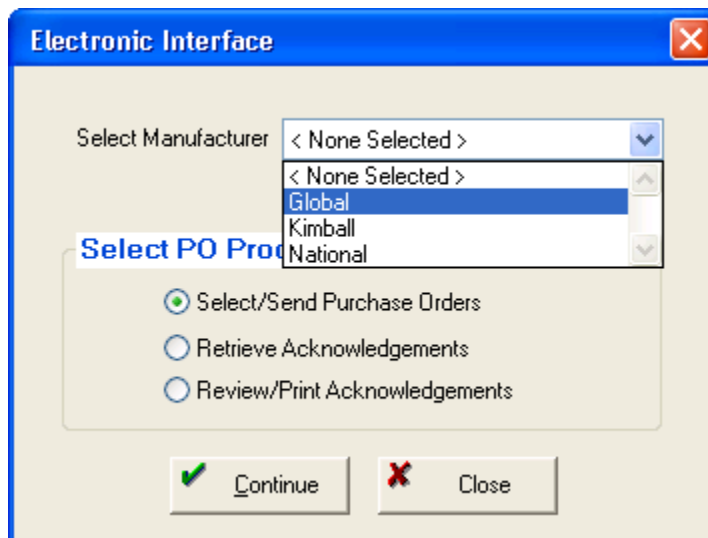
Creating the Purchase Order

- 1 From the TeamDesign menu, click Vendors > PurchaseOrders > Transactions > Create Orders.
- 2 The Print Purchase Orders window opens. Click the down arrow in the Select Desired Document box and click Purchase Order.
- 3 Click the Proposal button to open the Proposal List window and select the proposal for this purchase order.
- 4 Complete the purchase order in the normal manner. When you finish, click Accept. (For more information on creating proposals, see your TeamDesign online documentation.)

Transmitting P/Os to Global Using PSN

- 1 From the TeamDesign menu, click Vendors > PurchaseOrders > Electronic Interfaces > All Others. See Figure 4.
- 2 In the Electronic Interface dialog box, select Global.
- 3 Make sure the Select/Send Purchase Orders option is selected and click Continue. See Figure 5.

Figure 5: The Electronic Interface Dialog Box



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- 4 The Electronic Purchase Order Transmission dialog box opens. See Figure 6.

Click the Purchase Order Number box and enter the P/O number to transmit to Global. If you cannot recall the number, click Select Purchase Order to open the Search Purchase Orders dialog box.

- 5 The system displays information for the P/O you selected.
- 6 Notice that several boxes are shown in yellow. The yellow boxes must be completed before you can transmit the P/O.

Contract #: Enter the contract number for the purchase order you are transmitting. This box defaults to the number set in the proposal's profile Purchase Order tab. When the Distribution Channel box is set to Direct, the Contract # box is required.

Distribution Channel: Click the down arrow in this box to select the destination for the purchase order you are transmitting. This box indicates the location from where the items are shipped. You can choose from the following:

- **Dealer:** This option indicates to ship the items to you.
- **Direct:** This option indicates to ship the items to the customer.

Figure 6: The Electronic Purchase Order Transmission Dialog Box

Global Industries Electronic Purchase Order Transmission

Select Purchase Order: [0] [0] [0]

Desired Delivery Date/Time: Monday, March 02, 2009

Customer Purchase Order Number: [Yellow background]

Sales Person: [Yellow background]

Salesperson ID: [Yellow background]

Order Writer's ID: []

Global Sales ID: []

Contract #: []

Distribution Channel: Dealer [Yellow background]

Order Options: Bill To | Ship To | End Customer

Shipping Type: Standard

Ship Complete?

PO Special Description: []

Order Note: []

Shipping Tag: []

Shipping Attention: []

Shipping Instruction: []

View PO export file after transmission?

Note: Fields with yellow backgrounds are required!

Clear Values Send Exit

Global Key Code: This is used to identify any SPIFF.

- 7 The right-hand section of the window is divided into separate tabs: Order Options, Bill To, Ship To, and End Customer. Use these tabs to enter information for the P/O.

Click each tab and enter the P/O information. Some boxes are shown in yellow. The yellow boxes must be completed before you can transmit the purchase order to Global. If you leave them blank, the system displays an error message.

Order Options: This tab contains special shipping instructions for the P/O you are transmitting. You must also select a Shipping Type:

- **Standard:** This option ships from the distribution center.
- **5 Day Direct:** This option ships directly from the factory in Canada (Special Program).
- **Factory Direct:** This option is for larger orders that ship directly from the factory.
- **Will Call:** Select this option to pick up from a local distribution center.

Bill To: This tab displays the billing address for the P/O.

Ship To: This tab displays the purchase order shipping address. This is the address Global uses to ship the items on the order. This information can be changed.

End Customer: This tab displays the address of the customer receiving the items on the P/O.

- 8 When you finish entering information, click the View PO Export File After Transmission to view the data transmitted to Global.

- 9 Click Send.

- 10 If you have transmitted to Global before, go to **Step 14**.

If this is your first transmission to Global, the You Are Missing Your Login and/or Password prompt appears. Click Ok.

- 11 The Dealer Login Setup window opens.

Dealer Login: Enter the Dealer Login ID you received from Global.

Dealer Password: Enter the password you received from Global.

- 12 Click Save.

- 13 Click Send.

- 14 The PSN Acknowledgment Retrieval dialog box opens, as shown in Figure 7. Click Start.
- 15 The purchase order is transmitted, and the Electronic Purchase Order was Successfully Generated and Transmitted message appears. Click OK.

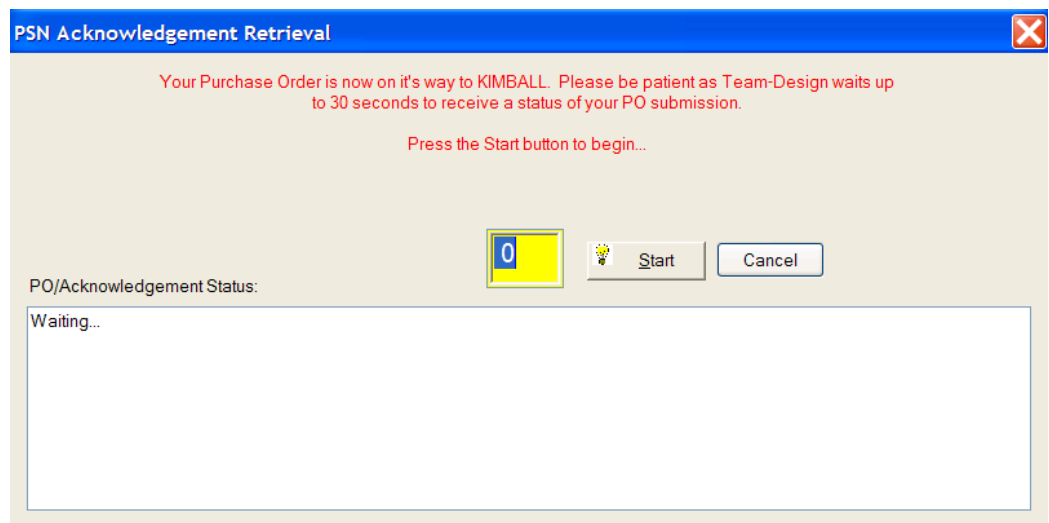
If you specified to view the Export file, the file automatically opens.

You must submit purchase orders one at a time.


Retrieving PSN Acknowledgments

- 1 From the TeamDesign menu, click Vendors > PurchaseOrders > Electronic Interfaces > Global.
- 2 In the Electronic Interface dialog box, click the Retrieve Acknowledgments option.
- 3 Click Continue.
- 4 The PSN Acknowledgment Retrieval Filters dialog box opens. Click Start.
- 5 The system begins searching for the purchase orders. When the information is found, the system displays it in the lower section of the window, along with the Completed message. Click OK.



Figure 7: The PSN Acknowledgment Retrieval Dialog Box



Reviewing/Printing PSN Acknowledgments

- 1 From the TeamDesign menu, click Vendors > PurchaseOrders > Electronic Interfaces > Global.
- 2 In the Electronic Interface window, click the Review /Print Acknowledgments option.
- 3 Click Okay.
- 4 The PSN Acknowledgments window opens. Click the down arrow in the PSN Manufacturer box and select Global, as shown in Figure 8.
- 5 Click the down arrow in the Salesmen ID box and select the salesperson.
- 6 In the PO Number Range boxes, you can limit the display by P/O number. Enter the beginning of the range in the From box and the end of the range in the corresponding To box.
- 7 In the Acknowledgement Date Range boxes, you can limit the display by P/O date range. Enter the beginning date in the From box and the ending date in the To box. To view a calendar by which to select the date, click .

Acknowledgement Filters

PSN Manufacturer: Salesman ID: PO Number Range: From: To: Acknowledgement Date Range: From:  To: 

When changing PO # or Ack Date, click on another field for change to take effect.

Mfgr	Sales ID	Proj #	P.O. #	Ack Date	Time	Order ID	Req Date	Bill-to Address	Ship-to Address

Item #	Part Number	Description	Dealer Price	Ship Date	Ship Qty	Ack Number

Figure 8: The PSN Acknowledgment Filters Window

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- 8 When you finish setting limits, click Print Report.
- 9 The system begins searching for the purchase orders that meet the limits you set. This report lists the items and also indicates whether there were any exceptions. Any variance between the order and the acknowledgment appear as exceptions. There are several different reasons an exception may occur including variations in the following:
 - Item cost
 - Item quantity
 - Item part number
 - Item attributes.
- 10 When you finish, click Exit.

Resending PSN Purchase Orders

If you need to cancel or change a submitted purchase order, you must telephone your Global representative and cancel the P/O.

Once the order is canceled, return to TeamDesign and perform one of the following functions:

- Kill the purchase order
- Remove the line items from the order
- Make the appropriate line item changes.

You can then create a new purchase order or reprint the P/O and transmit it to Global with the appropriate changes.