



*National Office Furniture
PSN and TEAM-DESIGN!*



January 2007 Item # H-TDNATIONAL

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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.

Install the following, using the appropriate software instructions:

- Version 7 or greater ADS.
- Software version 13 or greater *TEAM DESIGN!*.
- Install the latest PSN Communication Service. Go to <http://www.team-design.net/newpsn.php> to order the latest version and for installation documentation.
- Sign up for ECI² PSN. If you are not currently using the ECI² 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 ECI² PSN, you can simply add *TEAM DESIGN!* to your existing PSN account by following the setup instructions in this handout.

Setting Up *TEAM-DESIGN!*

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

- 1 Contacting National Office Furniture.
- 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 National vendor in the Vendor Profile Internal Usage tab.
- 5 Setting up the Ship To Profile window.
- 6 Creating the proposal.

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- 7 Creating the purchase order.
- 8 Transmitting the built P/O to National using PSN.

Contacting National Office Furniture

Contact National Office Furniture to receive the following:

If you are also a Kimball Office dealer, keep in mind that you can use the same procedures to set up PSN for Kimball.

- Your Dealer Login ID and Password.
- Your account numbers from National. (You may have several different account numbers if you have separate physical locations or if you offer different contract levels.) You'll need these numbers to set up your PSN communication options.
- National CDA numbers. (In *TEAM DESIGN!*, the National CDA number is known as your contract number. You enter it in the proposal profile in the Purchase Orders tab.)

Set 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 National Office Furniture as the default billing address. This is the address National Office Furniture uses to send invoices.

- 1 From the *TEAM DESIGN!* 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.

Figure 1: The PSN Comm Tab

The screenshot shows the 'SYSTEM CONFIGURATION' window for 'THE VERSION 13 COMPANY'. The 'PSN Comm' tab is active, displaying a form for dealer information. The form includes a 'Select Dealer' dropdown menu, a 'PSN Dealer Description' section with fields for Dealer Name, Address Line 1, Address Line 2, City, State/Province, and Postal Code, and a 'Contact Name' section with fields for Name, Phone Number, and E-Mail Address. There is a checkbox for 'Update New Cases With Electronic Acknowledged Cost?'. On the right, there is a 'Dealer ID' section with an 'Add New Dealer ID' field and a list box. At the bottom right, there are buttons for 'Set as Default Dealer ID' and 'Delete Selected Dealer ID'. A 'Save Changes' button is located at the bottom left.

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- 3 Click the down arrow in the Select Dealer box and choose the Add New Dealer option.
- 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.

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

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

If you are also a Kimball Office dealer, you can use these same steps to set up your system configuration settings for Kimball.

- 5 Click the Add New Dealer ID box. Enter the account number you received from National Office Furniture. 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 to use as the default when transmitting P/Os to National. When the correct ID is highlighted, click Set as Default Dealer 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.

Set Up the Output and Input Paths

Once you have contacted Kimball Office, 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 *TEAM DESIGN!* menu, click System > SetUp > PSN Setup.
- 2 The PSN Setup window opens. See Figure 2.



Figure 2: The PSN Setup Window

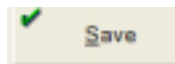
National Office Furniture PSN and *TEAM-DESIGN!*

Full Output Path: You use this box to enter the path where your out-bound 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: You use this box to enter the path where your in-bound 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 *TEAM-DESIGN!* Once you have registered for PSN services, do not change the IP address or Company ID unless instructed to do so by *TEAM DESIGN!*

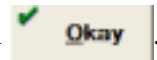
3 When you finish, click



Updating/Creating a National Office Furniture Vendor

1 From the *TEAM DESIGN!* menu, click Vendors > Maintenance.

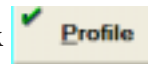
2 In the QuickFind window, click the search method and click



3 In the Vendor List window, double-click the National vendor.

Note: If the National Office Furniture vendor does not exist in your system, click  to add a new vendor. For details on adding new vendors, see your *TEAM DESIGN!* online documentation.

4 In the Vendor List window, click



5 In the Vendor window, click the Internal Usage tab.

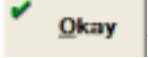
6 In the PSN Communications section of the tab, click the down arrow in the PSN Mfg ID box. Select the dealership name.

7 Click . The window closes and your changes are saved.

Note: If you are also a Kimball Office dealer, you can use these same steps to set up your Kimball vendor. In the PSN Mfg box, click Kimball.

Set Up the Ship To Profile Window

This process lets you assign an account number as a ship-to address. This account number is given to you by National Office Furniture. Ship-to account numbers are required when transmitting direct orders to National. If a ship-to account number is not assigned, the system sends a zero (0) to National.

- 1 From the *TEAM DESIGN!* menu, click Tables > ShipTo Addresses.
- 2 In the QuickFind window, click the search method and click .
- 3 In the ShipTo Addresses List window, double-click the address to change.

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

- 4 If this address will be used for international orders as a port of exit address, check the Is This a Port of Exit Address box. See Figure 3.

A Port of Exit address is often used for internationally shipped orders. Suppose you are shipping an order to England, but the order must first be sent to the New York harbor. In this case, England is your final destination, but the New York harbor is your Port of Exit address.


- 5 In the PSN Account Number Kimball/National box, enter the ten digit account number you received from National Office Furniture. Do not enter alpha (A, B, C) characters in this box.
- 6 Click . The window closes and your changes are saved.

Figure 3: The Is This a Port of Exit Address Box



ShipTo: 001001 The Master Warehouse

Description |

Name/Address	Miscellaneous
Sort Name: MASTER WAR	Manufacturer Customer Number: <input type="text"/>
Name: The Master Warehouse	Associated Customer Number: 1300
Address: 16205 Industrial Road	
City/State: Oak Hickory TN	
Postal Code: 38768623	
Country: USA	
Contact Name: Shane Sloan	
Phone Number: 615-758-0577	
<input checked="" type="checkbox"/> Is this a Port of Exit address?	
	PSN Account Number
	Kimball/National: <input type="text"/>

- 7 Repeat these steps for each Port of Exit address you use.

Create the Proposal

- 1 From the *TEAM DESIGN!* 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 The Proposal Profile window opens. Begin creating the proposal in the normal manner until you click the Addresses tab.
- 6 In the Addresses tab, if this is an international order, you can assign this proposal a port of exit address. Click the down arrow in the Port of Exit Address box and select the address to use as a port of exit address for this proposal. See Figure 4.
- 7 Complete the proposal as you normally would. When you finish, click  to save your changes. (For more information on creating proposals, see your *TEAM DESIGN!* online documentation.)

A Port of Exit address is often used for Internationally shipped orders. Suppose you are shipping an order to England, but the order must first be sent to the New York harbor. In this case, England is your final destination, but the New York harbor is your Port of Exit address.

Figure 4:
Selecting a Port of Exit Address for an International Order

Proposal: 1464

Descriptions | Project Information | **Addresses** | Invoicing | Commissions | Purchase Orders | Documents

Propose To Address	Ship To Address
THE BIGGEST HOUSE 3726 CELL DRIVE NASHVILLE, TN 37282	THE TEAM DESIGN SHIP TO 1588E LEBANON ROAD SUITE 207 OLD HICKORY, TN 37138
Cost Center	Contact Name Phone Number
Bill To Address 1212	Installation Address
THE BIGGEST HOUSE 3726 CELL DRIVE NASHVILLE, TN 37282	THE BIG HOUSE 3726 CELL DRIVE NASHVILLE, TN 37282

Port of Exit Address

Select From Address

- STORING WAREHOUSE -
- Sease Park South Drivage - Hermitage TN 37136
- STEVE THE SHIPPER - OLD HICKORY TN 37138
- Tammy Jones - WHOLESALE ROAD CT 06410
- Team Talk Dealer Wine - Nashville TN
- The Master Warehouse - Old Hickory TN 37138
- TODD'S WAREHOUSE -
- TRACY'S WAREHOUSE - HENDERSONVILLE TN 37075
- Warner's Storage - Nashville TN 37204
- WILSON'S WAREHOUSE -

Assigning Stock Order Numbers and Stock Line Item Numbers

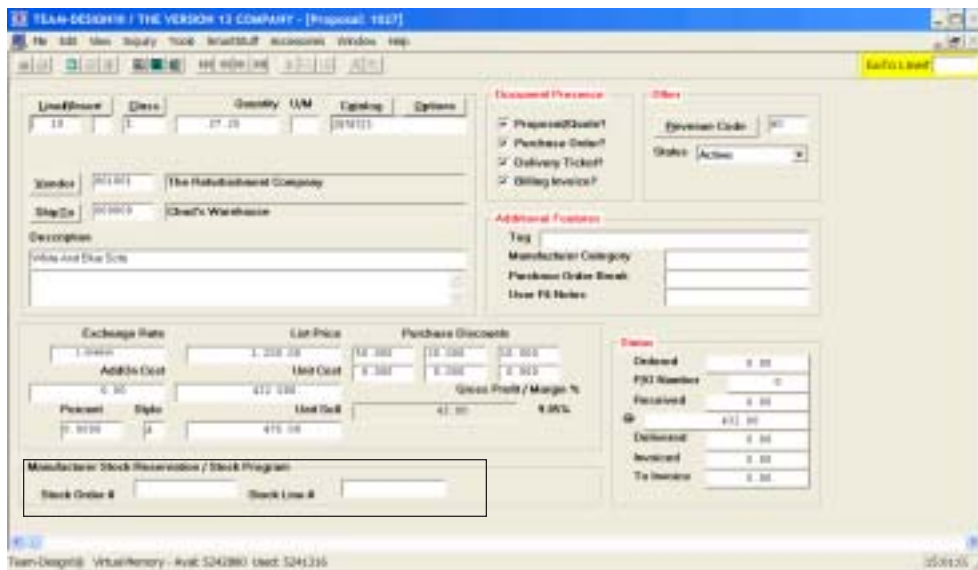
- 1 From the *TEAM DESIGN!* menu, click Customers > Proposals > Maintenance.
- 2 In the QuickFind window, click the search method and click Okay.
- 3 In the Proposals List window, double-click the proposal to change.
- 4 In the Proposal window, click Proposal Detail.
- 5 Click Select.
- 6 Information for the proposal you selected appears. Double-click the line item.
- 7 The line item detail opens. At the bottom of the window two boxes are used for National Office Furniture PSN. See Figure 5.

Stock Order #: This box is used to reserve the items on a specific purchase order transmitted to National Office Furniture. You receive this order number from National. If the order is being reserved by National, click this box and enter the number. If the order is not reserved, leave this box blank.

Stock Line #: This box is used to reserve specific line items on a purchase order transmitted to National Office Furniture. You receive this stock line item number from National. If items on the order are being reserved by National, enter the number in this box. If the items on the purchase order are not reserved, leave this box blank.

- 8 Click  to save your changes.

Figure 5: The Stock Order # and Stock Line # Boxes:



If you are also a Kimball Office dealer, follow this same procedure to enter your stock order and stock line numbers for Kimball.

Create the Purchase Order

- 1 From the *TEAM DESIGN!* 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 *TEAM DESIGN!* online documentation.)

Transmit P/Os to National Office Furniture Using PSN

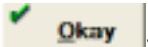
- 1 From the *TEAM DESIGN!* menu, click Vendors > PurchaseOrders > Electronic Interfaces > National. See Figure 6.
- 2 In the Interface window, be sure the Select Purchase Orders option is selected. Click .



Figure 6:
Selecting the
Kimball/
National Option

The right-hand section of this window is divided into separate tabs: *Shipping, Misc, Bill To, Ship To, PO Ship To, and End Customer.* You use these tabs to enter information for the P/O.

3 The Transmit Purchase Order Via PSN window opens, defaulting to the Shipping tab.

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

4 The system displays information for the P/O you selected, as shown in Figure 7. The Desired Delivery Date/Time box defaults to the system date and 12:00 a.m. Click the arrows to change the delivery date and/or time for the P/O.

5 Notice that several boxes are shown in yellow. 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 is National's CDA number. This box defaults to the number set in the proposal's profile Purchase Order tab.

Note: The system automatically completes the Order Writer, Order Writer Phone, and Order Writer's Email boxes when you select the P/O. The information in these boxes comes from the Contact Name, Phone Number, and E-Mail Address boxes in the PSN Comm tab of the System Configuration window. However, you can always change it. Click the boxes and enter the new information over the existing information.

Figure 7: The Electronic Purchase Order Transmission Window

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.
- **Warehouse:** This is a National option only. It indicates to ship the items to a dealer who is set up as a Wholesale/Rental/Catalog dealer and whose distribution channel is set to 30. (Standard dealers are set up with distribution channels of 10.)

Order Type: Click the down arrow in this box to change the type of purchase order you are transmitting. You can choose Mockup, Parts/Repair, Service Order and Standard. If it's a parts/replacement order, National requires an original sales order number and quality number.

Participating Dealer: This box only appears when you select the Direct option in the Distribution Channel box, as shown in Figure 8. Click this box to enter the participating dealer number.

Reference Dealer: Enter the account number (also known as the Dealer ID number) that you received from National. This box defaults to the Dealer ID number set in the PSN Communication tab in System Con-

Figure 8: The Participating Dealer Box

The screenshot shows a software window titled "Transmit Purchase Order via PSN". At the top, there are fields for "Select Purchase Order" (with values 30, 1, 1015), "Desired Delivery Date/Time" (Tuesday, July 25, 2006, 10:00 am), and "Customer Purchase Order Number" (394627). Below these are fields for "Sales Person" (8), "Order Writer" (RELLY MCNAMEE (30)), "Writer's Phone" (321-555-1212), and "Writer's E-mail" (mrcnamee@ec2.com). There are also fields for "Header Tag" and "Contract#" (Jamie Peterson). The "Distribution Channel" is set to "Direct" and "Order Type" is set to "Standard". The "Participating Dealer" field is highlighted in yellow and contains the value "0". Below it is the "Reference Dealer" field with the value "3537264990". On the right side, there are sections for "Shipping Instructions" (with "Deliver On" selected and "Ship Complete?" checked), "Special Packing Services" (with "Blanket Wrap", "Crate", "Double Pack", and "Reduced Carton" options), and "Special Shipping Services" (with "Inside Delivery", "Carton Removal", "Residential Delivery", "Setup", and "Weekend Delivery" options). At the bottom, there is a checkbox for "View PD export file after transmission?" and buttons for "Clear Values", "Send", "Exit", and "Change Password". A red note at the bottom left states "Note: Fields with yellow backgrounds are required!".

figuration. However, you can change it. To do so, enter the ten-digit account number you received from National. You must enter 10 numeric characters. Do not enter alpha (A, B, C) characters in this box.

- 6 The right-hand section of the window is divided into separate tabs: Shipping, Misc, Bill To, Ship To, PO 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. Yellow boxes must be completed before you can transmit the purchase order to National. If you leave them blank, the system displays an error message.

Shipping: This tab contains special shipping instructions for the P/O you are transmitting.

Misc: This tab displays the salesperson's numbers and corresponding gross profit percentages for the purchase order.

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

Ship To: This tab displays the shipping address for the P/O. This address represents the final destination for the items on the purchase order. The information in this tab comes from the proposal. It is for display only and cannot be changed.

P/O Ship To: This tab displays the purchase order shipping address. This is the address National uses to ship the items on the order. This information can be changed. You must specify the National account number in the Account # box. If you do not know the account number, be sure this box is set to Ø.

Note: In most cases, the Ship To and P/O Ship To tabs contain the same information, and you do not need to change it. An exception to this could be port of exit orders. In this case, the final destination address, shown in the Ship To tab and the port of exit address, shown in the P/O Ship To tab would be different. In this case, click the boxes in the P/O Ship To tab and specify the port of exit address for the order.

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

- 7 When you finish entering information, click the View PO Export File After Transmission to view the data transmitted to National Office Furniture.
- 8 Click Send.
- 9 If you have transmitted to National Office Furniture before, go to **Step 13**.

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You can change your Dealer Login ID and password in the Transmit Purchase Order via PSN window at any time by clicking Change Password.

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

10 The Dealer Login Setup window opens.

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

Dealer Password: Enter the password you received from National.

11 Click Save.

12 Click Send.

13 The PSN Acknowledgment Retrieval window opens, as shown in Figure 9. Click Start.

14 The purchase order is transmitted, and the Electronic Purchase Order was Successfully Generated and Transmitted message appears. Click OK.

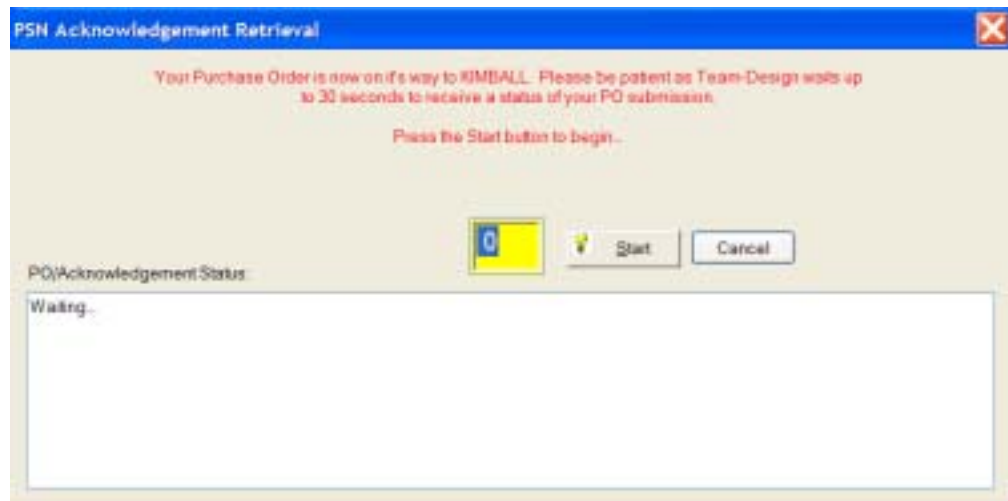
If you specified to view the Export file, the file automatically opens.

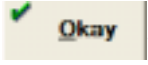
You must submit purchase orders one at a time..

Retrieving PSN Acknowledgments

- 1 From the *TEAM DESIGN!* menu, click Vendors > PurchaseOrders > Electronic Interfaces > National.

Figure 9: The PSN Acknowledgment Retrieval Window



- 2 In the Electronic Interface window, shown in Figure 10, click the Retrieve Acknowledgments option.
- 3 Click .
- 4 The PSN Acknowledgment Retrieval window 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.

Reviewing/Printing PSN Acknowledgments

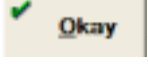
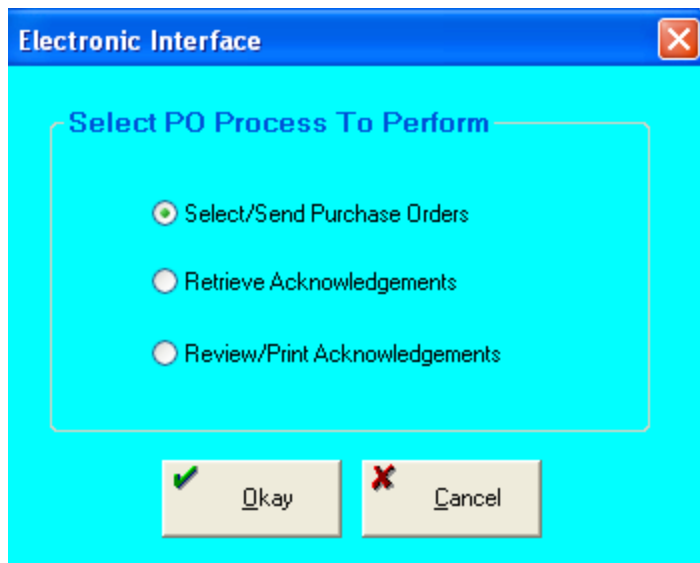

- 1 From the *TEAM DESIGN!* menu, click Vendors > PurchaseOrders > Electronic Interfaces > National International.
- 2 In the Electronic Interface window, click the Review/Print Acknowledgments option.
- 3 Click .
- 4 The PSN Acknowledgments window opens. Click the down arrow in the PSN Manufacturer box and select National.
- 5 Click the down arrow in the Salesmen ID box and select the salesperson.
- 5 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.

Figure 10: The Electronic Interface Window



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- 6 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 .
- 7 When you finish setting limits, click Print Report.
- 8 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.
- 9 When you finish, click Exit.

Resending PSN Purchase Orders

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

Once the order is canceled, return to *TEAM-DESIGN!* 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 National with the appropriate changes.