

*Knoll 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 acknowledgements from vendors. The always-on connection is both fast and reliable.

PSN simply requires loading the latest software and setting up a few identifiers and passwords. Once you've set up your system for PSN, it's invisible. There is no learning curve and there are 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 http://www.ecisolutions.com/customers/teamdesign/td_psn.htm.

Before You Begin

Install the following, using the appropriate software instructions:

- ADS Version 9.0 or greater.
- TeamDesign Software version 15.05 or greater.
- The latest PSN Communication Service which can be found on your TeamDesign CD. You can also visit http://www.ecisolutions.com/customers/teamdesign/td_psn.htm 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.ecisolutions.com/customers/teamdesign/psnform.htm>. 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 Knoll using PSN involves:

- 1 Contacting Knoll.
- 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 Knoll vendor in the Vendor Profile Internal Usage tab.
- 5 Setting up the Ship To Profile window.
- 6 Creating the proposal.
- 7 Creating the purchase order.
- 8 Transmitting the built P/O to Knoll using PSN.

Contacting Knoll

Contact Knoll to receive details for your Knoll account, including:


- 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.
- Knoll contract numbers. (In TeamDesign, the Knoll contract numbers are entered in the proposal profile in the Purchase Orders tab.)

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 Knoll as the default billing address. This is the address Knoll uses to send invoices.

- 1 From the TeamDesign menu, click System, then SetUp, then 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 section includes 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.

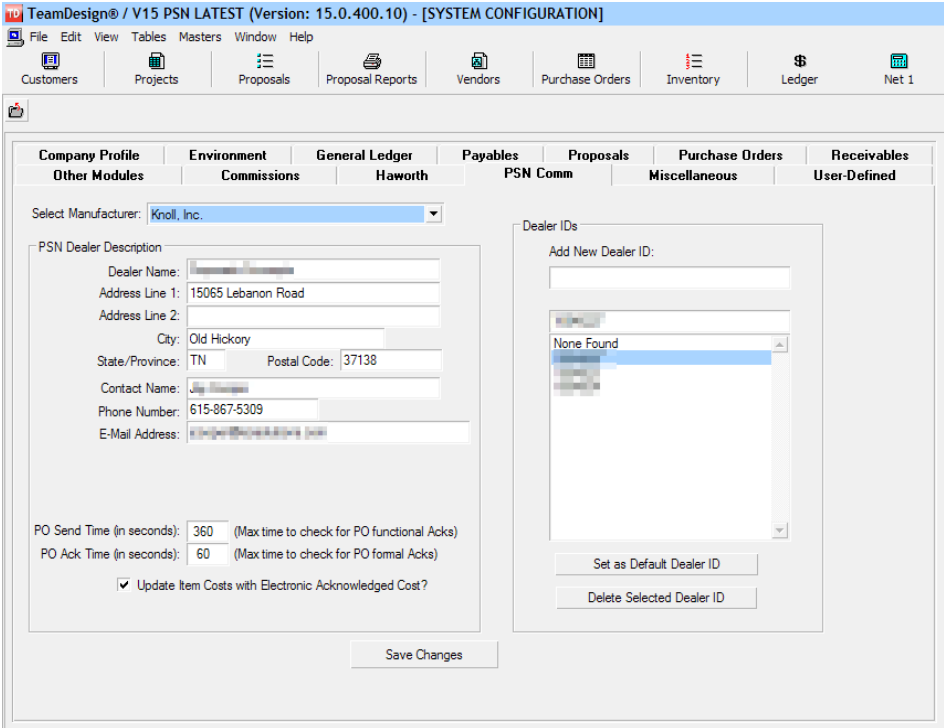
- 5 Click the Add New Dealer ID box. Enter the account number you received from Knoll. Press Enter. Continue to add as many account numbers as needed. You may need to add multiple account numbers if you have separate physical locations or if you offer different contract levels.
- 6 Select the dealer identification code that is most frequently used as the default when transmitting P/Os to Knoll. 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 Knoll, set up your output and input paths. This defines the directory where the PSN is stored. 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, then Setup, then PSN Configuration.

Figure 1: The PSN Comm Tab



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

In the Full Output Path box, enter the path where your outbound temporary files are stored. We recommend you use the path T:\PSNOUT.


In the Full Inbound Path box, 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 Save.

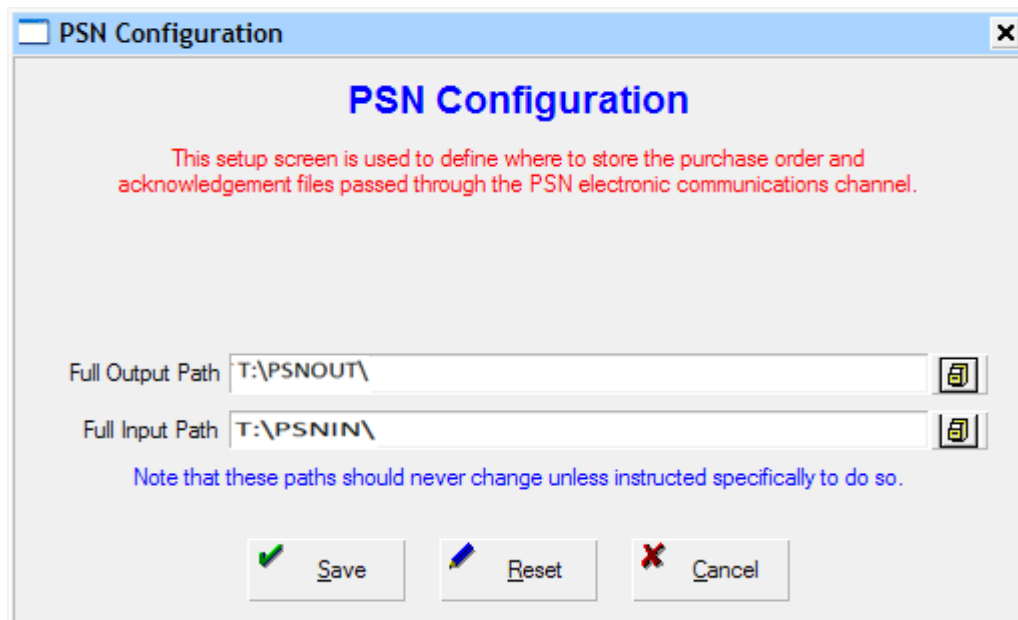
Updating/Creating a Knoll Vendor


- 1 From the TeamDesign menu, click Vendors, then Maintenance.
- 2 In the Vendor List window, double-click the Knoll vendor.

Note: If the Knoll vendor does not yet 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. Knoll does not require a ship-to account number.

- 1 From the TeamDesign menu, click Tables, then 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.

Creating the Proposal


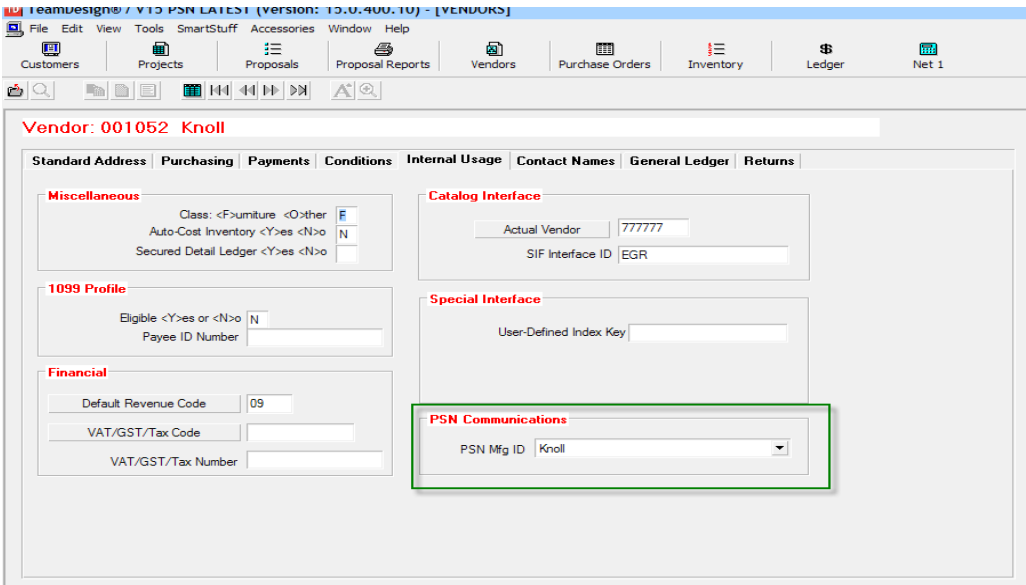

- 1 From the TeamDesign menu, click Customers, then Proposals, then Maintenance.
- 2 To add a new proposal, click .
- 3 In the Create Proposal window, enter the information for this proposal.

Figure 3: The Internal Usage Tab



- 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 Knoll to properly process the order.

Creating the Purchase Order

- 1 From the TeamDesign menu, click Vendors, then Purchase Orders, then Transactions, then 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 Using PSN

- 1 From the TeamDesign menu, click Vendors, then Purchase Orders, then Electronic Interfaces, then All Others.
- 2 In the Electronic Interface dialog box, select Knoll.
- 3 Make sure the Select/Send Purchase Orders option is selected and click Continue. See Figure 4.
- 4 The Electronic Purchase Order Transmission dialog box opens, defaulting to the Project tab. See Figure 5.
Enter the P/O number. 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 The top section of the window is divided into separate tabs: Project, Dealer Info, Shipping Addresses, and Miscellaneous. Use these tabs to enter information for the P/O.

Note: Several boxes are shown in yellow. The yellow boxes must be completed before you can transmit the P/O. If you leave them blank, the system displays an error message.

The Project tab displays the customer P/O number, as well as end user information and the requested delivery date. Knoll assigns their dealer's customers an end user number. This number can be manually entered here. If this number is unknown, a dealer can enter the end customer's name.

Figure 4: The Electronic Interface Dialog Box

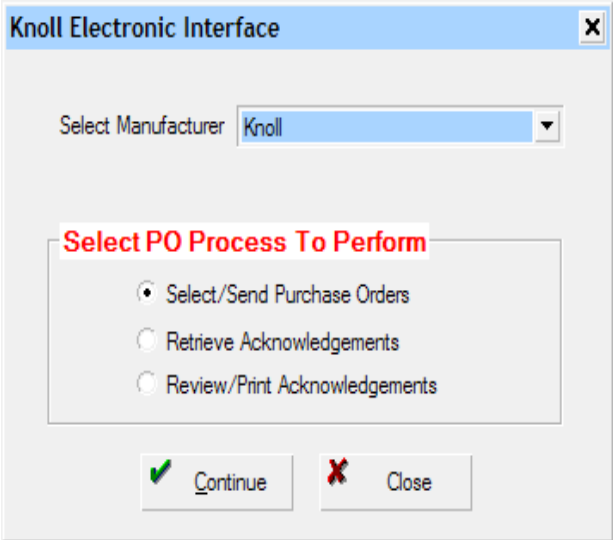
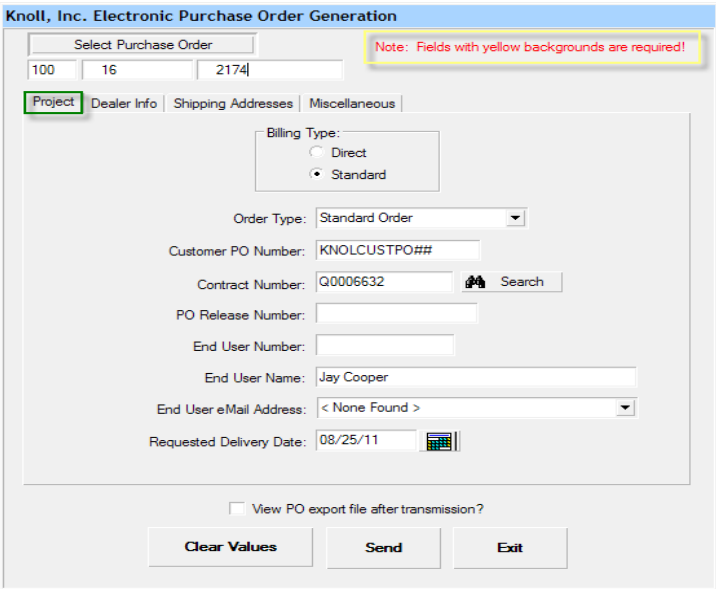


Figure 5: The Electronic Purchase Order Transmission Project Tab



Knoll PSN and TeamDesign

The Dealer Info tab displays dealer information, including the dealer ID, contact name and phone number.

The Shipping Addresses tab displays the purchase order shipping address and the destination shipping address. See Figure 6.

The Miscellaneous tab displays the delivery contact name and phone number, as well as special shipping instructions and order notes. Any notes entered here are read by Knoll.

- 7 Click Send.
- 8 The Acknowledgement Retrieval dialog box opens, as shown in Figure 7. Click Start.
- 9 When the seconds counter turns green, the Exit button appears. The file is converted to an XML format and placed in the PSN folder where you specified for it to be stored.
- 10 Click Exit.

The P/O is now in a format in which you can upload to the Knoll Order Exchange website.

Note: You must now access the Knoll Order Exchange website and manually locate the .po file on your server from the T:\PSNOUT\KNOLL folder and upload.

Figure 6: The Electronic Purchase Order Transmission Shipping Addresses Tab

Knoll, Inc. Electronic Purchase Order Generation

Select Purchase Order: 100 16 2174

Note: Fields with yellow backgrounds are required!

Project | Dealer Info | **Shipping Addresses** | Miscellaneous

Purchase Order Shipping Address

Name: INSTALLATIONS BY GEORGE

Address 1: # 99 INDUSTRIAL PARK SO.

Address 2: WHSE # 46

City: SAWDUST

State/Prov: Tennessee Postal Code: 37045

Country: US

Copy

Destination Shipping Address

Name: BuyKnoll Now

Address 1: 15065 Lebanon Road

Address 2:

City: Old Hickory TN

State/Prov: Postal Code: 37138

Country: US

Clear

View PO export file after transmission?

Clear Values Send Exit

Retrieving PSN Acknowledgements

Once Knoll sends the acknowledgement via email, you must save the .ack file in your T:\PSNIN\KNOLL folder on your server. The acknowledgement is then processed as follows:

- 1 From the TeamDesign menu, click Vendors, then Purchase Orders, then Electronic Interfaces, then Knoll.
- 2 In the Electronic Interface dialog box, click the Retrieve Acknowledgements option.
- 3 Click Continue.

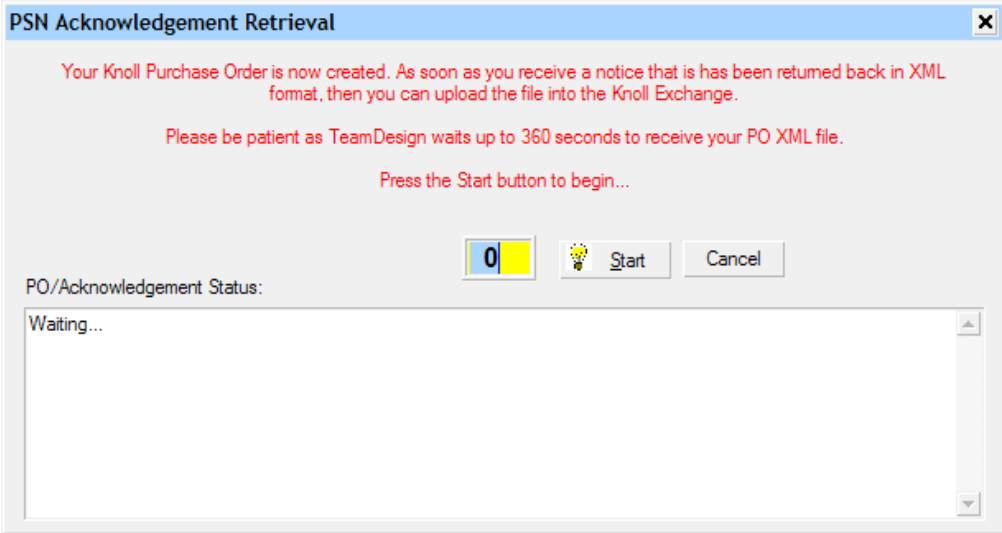
When the acknowledgment files are successfully imported into TeamDesign, you must manually remove the files from the T:\PSNIN\KNOLL folder on your server. It is safe to delete them, but you may also save them to another location for future reference.

- 4 The PSN Acknowledgement Retrieval Filters dialog box opens. See Figure 8. 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 Exit.

Reviewing/Printing PSN Acknowledgements

- 1 From the TeamDesign menu, click Vendors, then Purchase Orders, then Electronic Interfaces, then Knoll.

Figure 7: The PSN Acknowledgement Retrieval Dialog Box




- 2 In the Electronic Interface window, click the Select Review/Print Acknowledgements.
- 3 Click Okay.
- 4 The PSN Acknowledgements window opens. Click the down arrow in the PSN Manufacturer box and select Knoll. See Figure 9.
- 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 .

Figure 8: The PSN Acknowledgement Retrieval Dialog Box

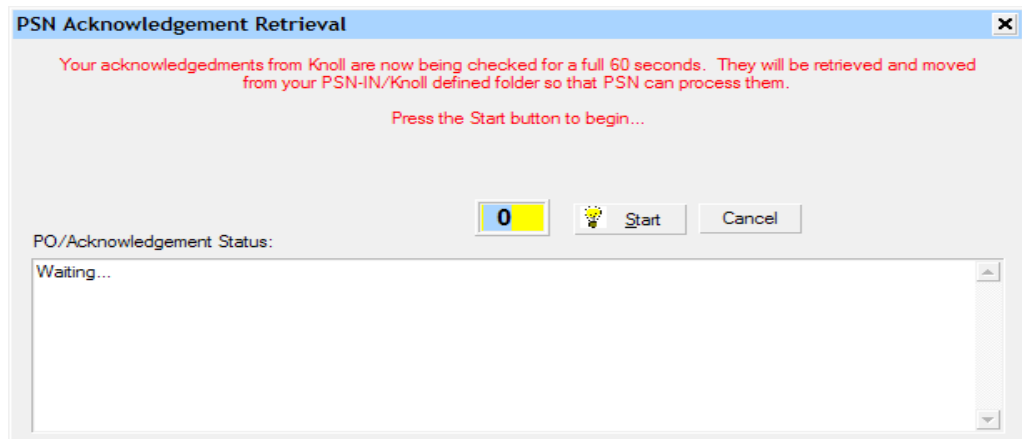
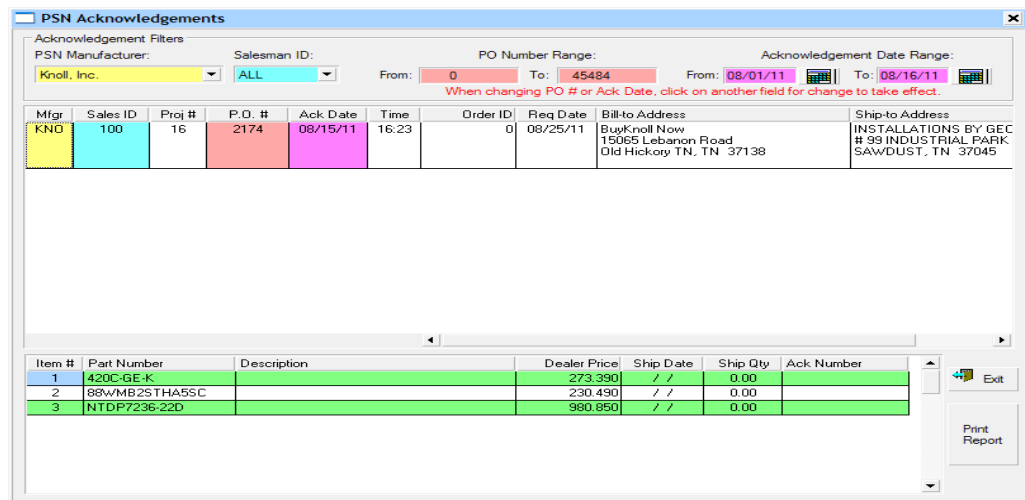


Figure 9: The PSN Acknowledgements Window



- 8 When you finish setting limits, click Print Report.
- 9 The Acknowledgement Report dialog box appears. See Figure 10. Click Create Report. The system begins searching for the purchase orders that meet the limits you set.
- 10 This report lists the items and also indicates whether there were any exceptions. See Figure 11.

Any variance between the order and the acknowledgement appear as exceptions. There are several different reasons an exception might occur including variations in the following:

 - Item cost
 - Item quantity
 - Item part number
 - Item attributes.
- 11 When you finish, click Exit.

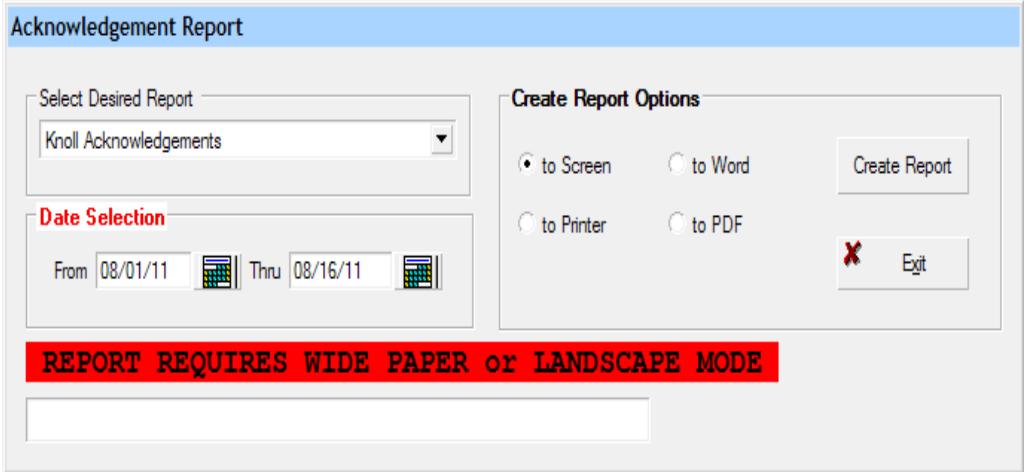
Resending PSN Purchase Orders

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

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

- Cancel the purchase order.

Figure 10: The PSN Acknowledgement Report Window



Knoll PSN and TeamDesign

- 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 Knoll with the appropriate changes.

Figure 11: The PSN Acknowledgement Report

Printed: 8/16/2011 12:35:16PM

Knoll, Inc. Acknowledgement Review
V15 PSN LATEST
For Salesman ID: All
Review Date Range: 08/01/11 - 08/16/11

Page: 1
JAY

Purchase Order: 100-162174
 Acknowledgement: Ack Received ON: 08/15/11 AT: 16:23

Sold To: INSTALLATIONS BY GEORGE (0)
 # 99 INDUSTRIAL PARK SO.
 WHSE # 46
 SAWDUST, TN 37045

Destination: BuyKnoll Now (0)
 15065 Lebanon Road
 Old Hickory TN, TN 37138

No notes in here

Line #	Qty	Catalog Number	Description	Mfg Code	Vendor Del. Date	Unit Cost	Extended Cost
1	6.00	420C-GEK	Harry Bertola Side Chair, upholstered seat cushion, gre ~ OPT: Standard QK37933 TEX: Format (A)	KUS	1,052 3/15/2011	273.39	1,640.34
			Ack Discrepancies: Ack Quantity = 0.00				
2	4.00	88/WMB2STHAGSC	Essentials Tech Work Chair, suspension back, midback, ~ UPH: Standard (K1000) SEAT: Presto K10003 COL: Stone S09 BACK: Beige/Taupe Y Ext Warranty, spec separately (Y) specify EXTWARRANTY from KCH (Y) KCH is Special Charges catalog	KSS	1,052	230.49	921.96
			Ack Discrepancies: Ack Quantity = 0.00				
3	12.00	NTDP7236-22D	Double Pedestal Desk with Downtown edge, 71Wx36Dx28-1/2 (NEW) Ultra Clear Polyur veneer Y132 FIN: Quartered Medium Ash S OPT: S Pull W OPT: Wood Interiors G OPT: with Grommets (RANDOM) LOCK: Randomly Keyed	KCS	1,052	980.85	11,770.20
			Ack Discrepancies: Ack Quantity = 0.00				
Total for Purchase Order # 100-16-2174:						14,332.50	

U:\V15PSNLATEST\reports\VK0036.pt