

*Using the Herman Miller
PSN with TeamDesign*



June 2010, Rev.

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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 http://www.ecisolutions.com/customers/teamdesign/td_psn.htm#tab1.*

Before You Begin

Install the following, using the appropriate software instructions:

- ADS Version 8.10.27 or greater.
- Software version 15 or greater TeamDesign.
- Install the latest PSN Communication Service, which can be found on your TeamDesign CD. You can also visit <http://www.ecisolutions.com/customers/teamdesign/psnform.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/td_psn.htm#tab1. 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 HMI using PSN involves:

- 1 Contacting HMI.
- 2 Setting up the PSN Communication Service.
- 3 Setting up the input and output paths in the PSN Setup window.
- 4 Setting up system security in the PSN Access tab.

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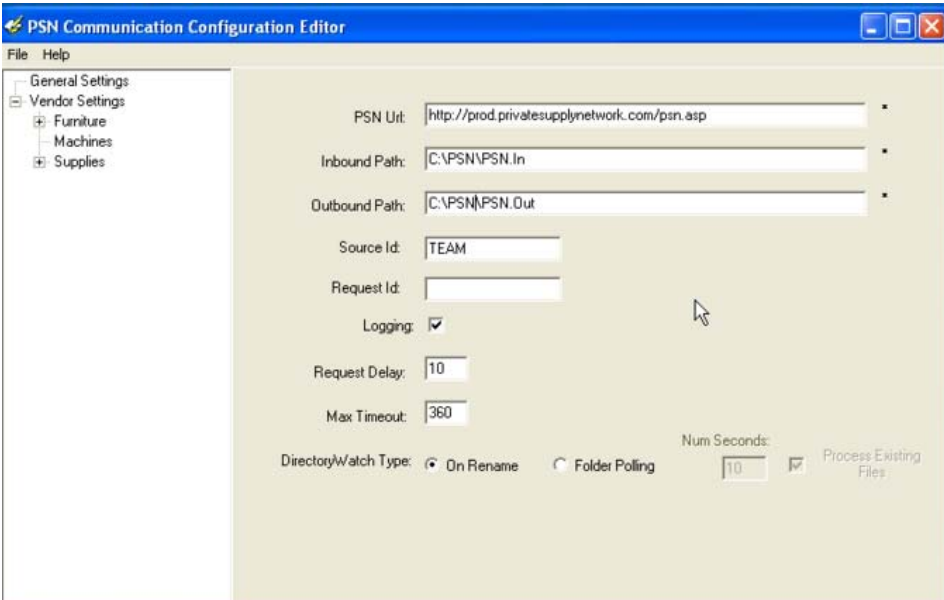
- 5 Setting up the PSN Comm tab in the System Configuration window.
- 6 Updating/Creating an HMI vendor in the Vendor Profile Internal Usage tab.
- 7 Creating the proposal.
- 8 Using contracts with HMI.
- 9 Creating the purchase order.

Contacting HMI

Contact HMI to receive details for your HMI 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.
- HMI contract numbers. (In TeamDesign, the HMI contract numbers can be stored in the Customer Contract Prices table. They can be entered in the Proposal Profile Purchase Orders tab or set in the PSN Transmission screen. For more details, refer to the heading **Using Contracts with Herman Miller PSN.**)
- The Herman Miller Kiosk Order Manager has a setting labeled Allow Duplicate PO Numbers. We suggest this box be left blank. Please contact Herman Miller directly with any questions.

Figure 1: The PSN Configuration Editor



PSN Communication Configuration Editor

File Help

General Settings

Vendor Settings

Furniture

Machines

Supplies

PSN Url:

Inbound Path:

Outbound Path:

Source Id:

Request Id:

Logging:

Request Delay:

Max Timeout:

DirectoryWatch Type: On Rename Folder Polling

Num Seconds: Process Existing Files

Setting Up the PSN Communication Service

- 1 Use Windows Explorer to browse to Program Files, eCommerce Industries Inc, PSN Communication Service.

Note: You must install the PSN Communication Service first. For more information, see http://www.ecisolutions.com/customers/teamdesign/td_psn.htm#tab1 for installation documentation.

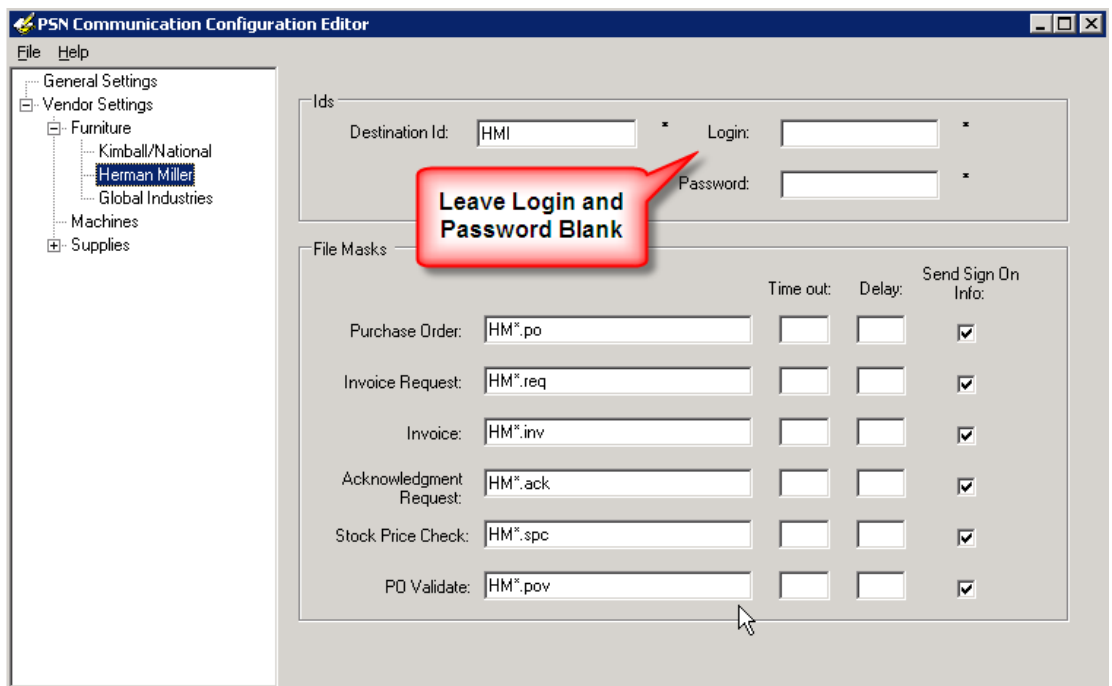
- 2 Click PSNCSConfigEditor.exe.
- 3 The PSN Communication Configuration Editor opens, as shown in Figure 1.
- 4 In the PSN URL box, verify that the correct URL is listed. Update if necessary.
- 5 Enter the inbound and outbound paths for PSN in the Inbound Path and Outbound Path boxes. Record the paths for later use.

The output and input paths you specify must be on a network drive. We suggest you use drive T.

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

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.

Figure 2: The PSN Configuration Editor, Herman Miller Furniture Info



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- 6 Click Vendor Settings in the menu on the left of the window. Then, click Furniture and select Herman Miller to access Herman Miller settings. Leave the Login ID and Password boxes blank. See Figure 2.

Note: If Herman Miller is not shown in the Furniture list, install the latest PSN Communication Service.

- 7 In the File drop down menu, click Save. Then, at the prompt, click Yes to restart the service.

Setting Up the Output and Input Paths

Once you have contacted HMI, set up your output and input paths.

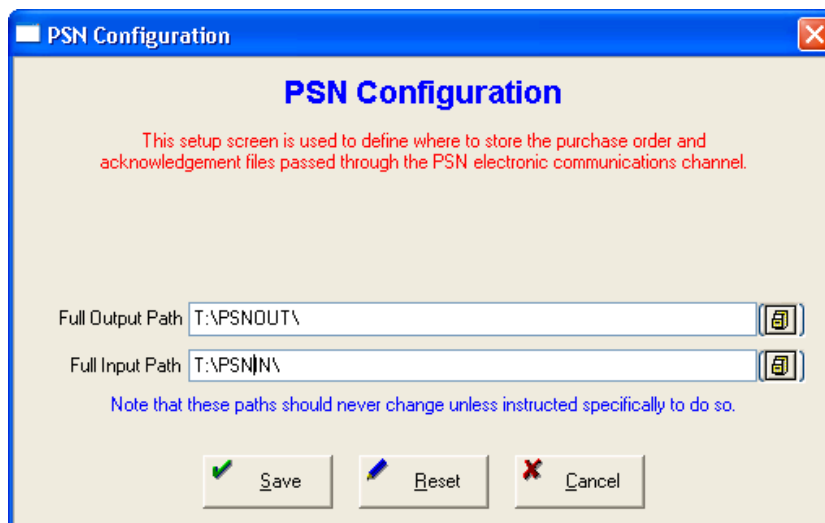
Note: You only need to complete this step the first time you use PSN.

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.
- 2 The PSN Configuration dialog box opens. See Figure 3. In the Full Output Path and Full Input Path boxes, enter the paths you recorded when **Setting Up the PSN Communication Service**.

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

Figure 3: The PSN Configuration Dialog Box



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.

Note: Once you click Okay, archive and log folders are created in the eCommerce Industries Inc, PSN Communication Service folder. When working with tech support, you may be accessed to access the information in this folders.

Setting UP System Security

You must set up a login and password for each user that sends purchase orders to Herman Miller. If the user who is logged in is not set up, the PSN screens are not accessible.


- 1 From the TeamDesign menu, click System, SetUp, Security.
- 2 Click the PSN Access tab, shown in Figure 4.
- 3 In the Login ID box, enter the 32-character login ID for the first user.
- 4 In the Password box, enter the 32-character password corresponding to the login ID.

Figure 4: The PSN Access Tab

The screenshot shows the 'PSN Access' tab in the TeamDesign software. The user is identified as 'Mark Goldman'. The interface includes a menu bar with options like File, Edit, View, Tools, SmartStuff, Accessories, Window, and Help. Below the menu bar are several icons representing different modules: Customers, Projects, Proposals, Proposal Reports, Vendors, Purchase Orders, Inventory, and Ledger. The main content area is titled 'User ID: Mark Goldman' and contains three sections for user login:

- Global Industries:** Logon ID: 12234444, Password: 23445555
- Herman Miller Inc.:** Logon ID: 1111111111222222222233333333344, Password: 55555555566666666677777777788
- Kimball/National:** Logon ID: 123234344, Password: 12232344

Note: Contact HMI to obtain user names and passwords. You can copy and paste your user name and password into the Login ID and Password boxes.

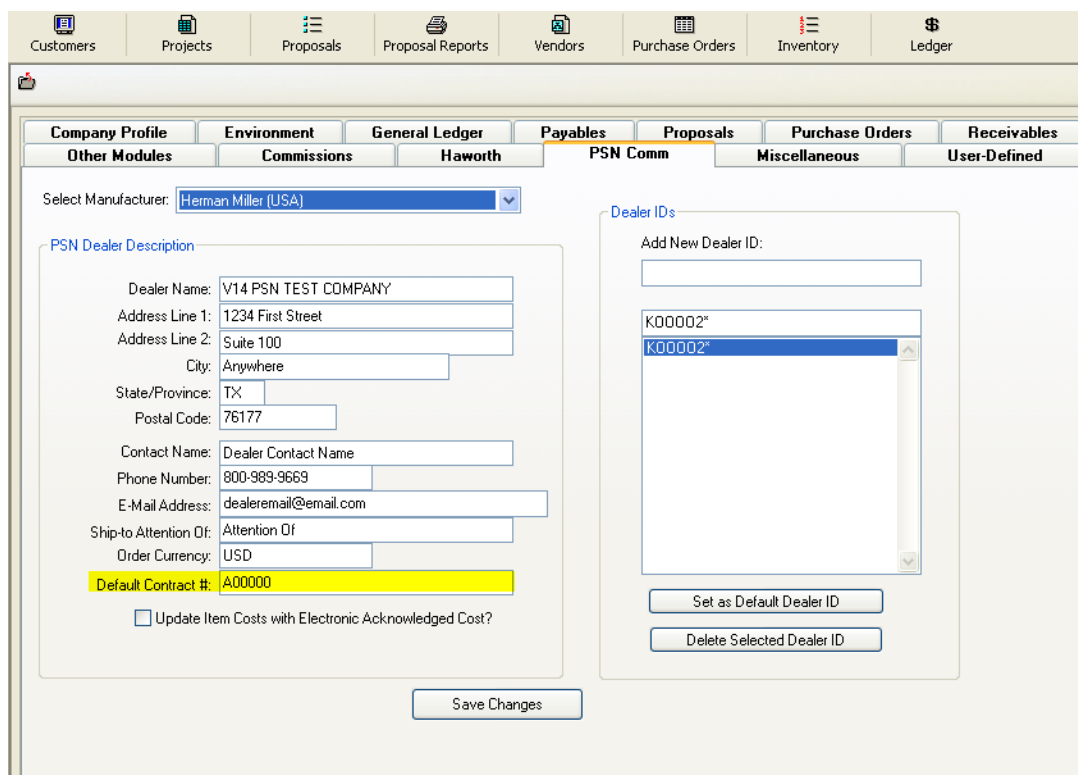
- 5 Click  to move to the next user. Continue to add a login ID and password for each user in your system.

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 HMI as the default billing address. This is the address HMI 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.
- 3 Click the down arrow in the Select Manufacturer box and choose your Herman Miller Alliance vendor, as shown in Figure 5.

Figure 5:
Selecting
Herman Miller
Inc in the PSN
Comm Tab



The screenshot shows the 'PSN Comm' tab of the System Configuration window. At the top, there is a navigation bar with icons for Customers, Projects, Proposals, Proposal Reports, Vendors, Purchase Orders, Inventory, and Ledger. Below this is a sub-navigation bar with tabs for Company Profile, Environment, General Ledger, Payables, Proposals, Purchase Orders, and Receivables. Underneath, there are more specific tabs: Other Modules, Commissions, Haworth, PSN Comm (which is active), Miscellaneous, and User-Defined. The main content area is divided into two sections. On the left, 'PSN Dealer Description' includes a 'Select Manufacturer' dropdown set to 'Herman Miller (USA)'. Below it are input fields for Dealer Name (V14 PSN TEST COMPANY), Address Line 1 (1234 First Street), Address Line 2 (Suite 100), City (Anywhere), State/Province (TX), Postal Code (76177), Contact Name (Dealer Contact Name), Phone Number (800-989-9669), E-Mail Address (dealeremail@email.com), Ship-to Attention Of (Attention Of), and Order Currency (USD). The 'Default Contract #' field is highlighted in yellow and contains 'A00000'. There is also a checkbox for 'Update Item Costs with Electronic Acknowledged Cost?'. On the right, the 'Dealer IDs' section has an 'Add New Dealer ID' input field and a list box containing 'K00002*'. Below the list box are buttons for 'Set as Default Dealer ID' and 'Delete Selected Dealer ID'. A 'Save Changes' button is located at the bottom center of the window.

Note: Currently TeamDesign supports transmissions from Herman Miller USA, Herman Miller Canada, Baker Manufacturing, and SitOnIt Seating. The HMI PSN does not currently accept Geiger USA or Geiger Canada transmissions.

4 The PSN Dealer Description boxes include the Dealer Name through Default Contract # box. Click each box and enter the information.

In the Contact Name box, enter the person to contact regarding the order. This contact is normally an accounts payable employee.

In the Default Contract # box, enter the default dealer contract number. This information is required.

Check the Update Item Costs with Electronic Acknowledged Cost to update all Herman Miller P/Os with the acknowledged cost.

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 HMI. 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 HMI. 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.

Updating/Creating a HMI Vendor

1 From the TeamDesign menu, click Vendors, Maintenance.

2 In the Vendor List window, double-click the HMI vendor.

Note: If the HMI 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.

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


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

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

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- 5 In the PSN Communications section of the tab, click the down arrow in the PSN Mfg ID box. Select your Herman Miller Alliance vendor. See Figure 6.
- 6 Click . The window closes and your changes are saved.

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 the proposal.
- 4 In the Addresses tab, make sure to adhere to the labels for the address. See Figure 7.

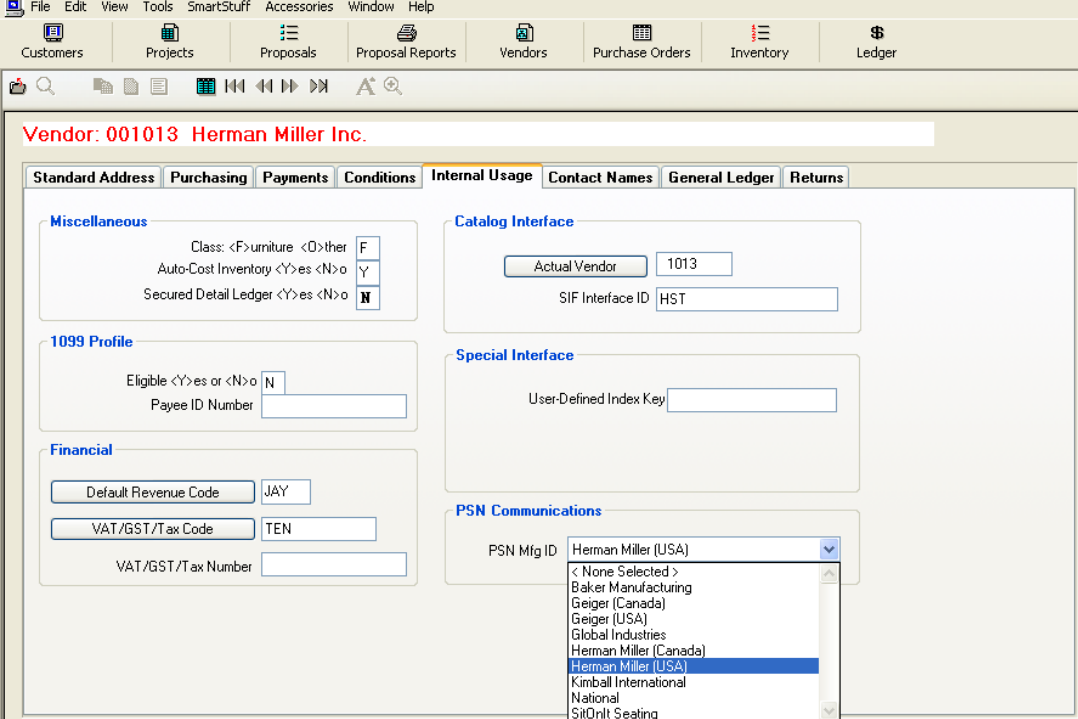
When you transmit an order to HMI, the Installation Address is used as the end customer address. You must enter this information as follows for the end customer address to be correctly transmitted.

Company Name: Enter the end customer company name.

Address 1: Enter the address for the end customer.

Address 2: Enter the suite number for the end customer.

Figure 6: The Internal Usage Tab




The screenshot displays the 'Internal Usage' tab for Vendor 001013 Herman Miller Inc. The interface includes a menu bar (File, Edit, View, Tools, SmartStuff, Accessories, Window, Help) and a toolbar with icons for Customers, Projects, Proposals, Proposal Reports, Vendors, Purchase Orders, Inventory, and Ledger. The main content area is divided into several sections:

- Miscellaneous:** Class: <F>urniture <D>ther (F), Auto-Cost Inventory <Y>es <N>o (Y), Secured Detail Ledger <Y>es <N>o (N).
- 1099 Profile:** Eligible <Y>es or <N>o (N), Payee ID Number (empty field).
- Financial:** Default Revenue Code (JAY), VAT/GST/Tax Code (TEN), VAT/GST/Tax Number (empty field).
- Catalog Interface:** Actual Vendor (1013), SIF Interface ID (HST).
- Special Interface:** User-Defined Index Key (empty field).
- PSN Communications:** PSN Mfg ID dropdown menu showing a list of vendors, with 'Herman Miller (USA)' selected.

City, ST Zip: Enter the city, state, and Zip Code for the end customer address.

Note: The address can be corrected in the End Customer tab in the Electronic Purchase Order Transmission dialog box. However, this change is not updated on the purchase order.

5 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 (20-20 Worksheet, ProjectSpec, or Configura) before importing into a TeamDesign proposal.

6 In the Proposal Maintenance window, click View and select Purchase Orders. Click Okay to display a list of purchase orders.

Once the purchase orders display, a list of vendor purchase orders is available in the Proposal Profile Purchase Order tab. You can assign contract numbers to each by clicking the Contract Numbers box and entering a contract number for the vendor. You also have the ability to change contract numbers in this tab.

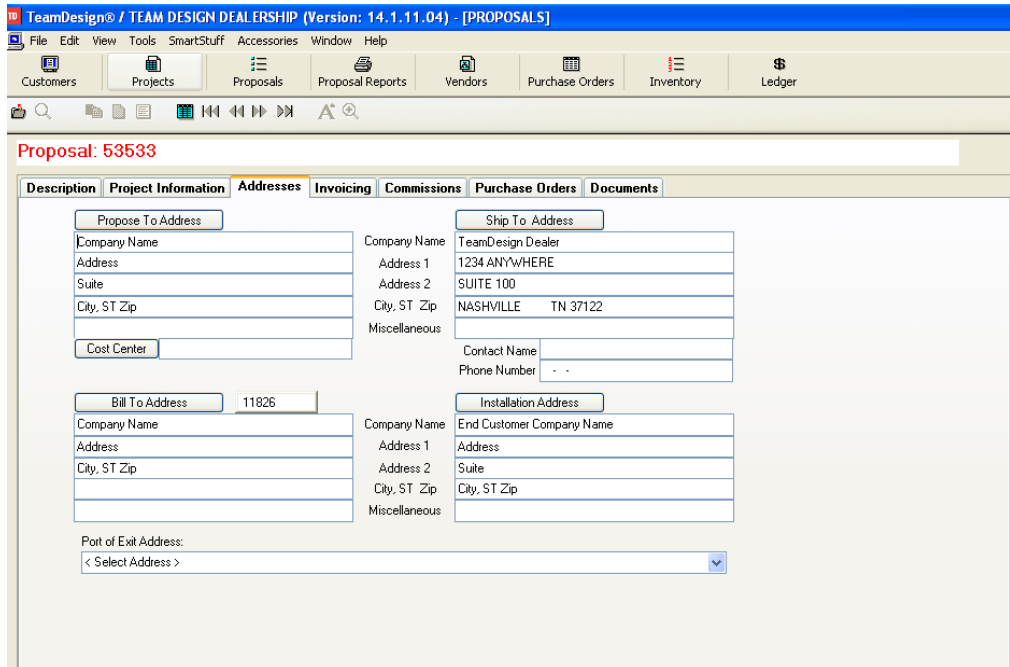


Figure 7: The Proposal Addresses Tab

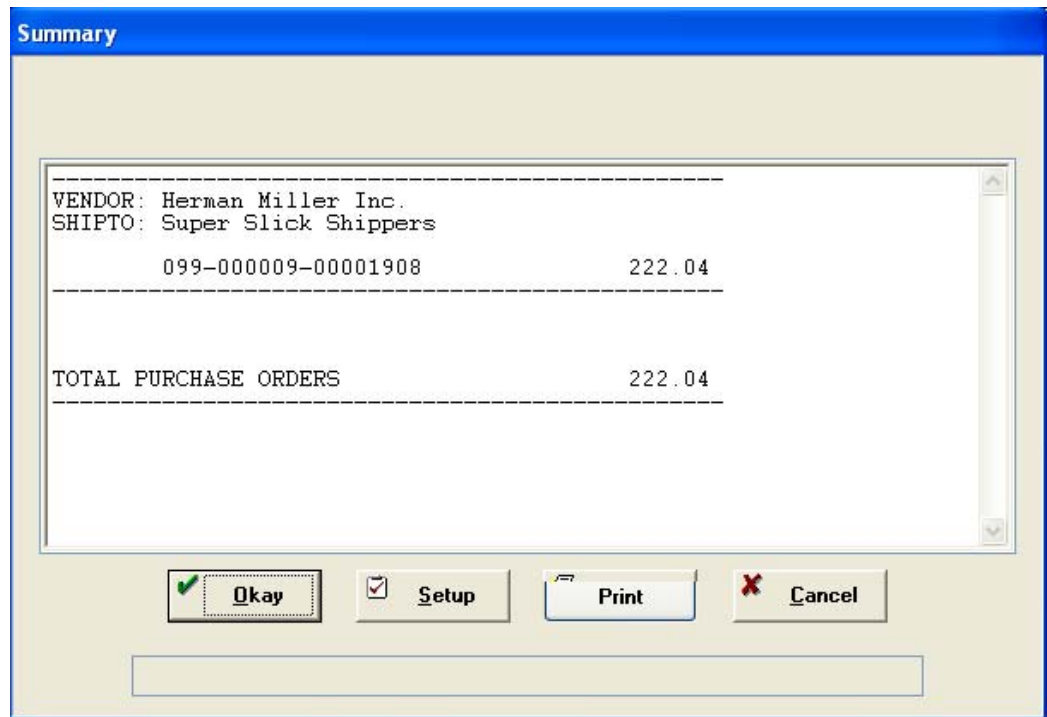
Using Contracts with Herman Miller PSN

Herman Miller requires a valid contract number for every purchase order. The default contract number is stored in the PSN Comm tab of System Configuration. Refer back to Figure 5.

Other contracts can be stored in the Customer Profile Special Prices tab. Contracts that are stored this way display in the Customer Contracts Prices table.

- 1 To apply a contract to a purchase order, first create a virtual purchase order.
- 2 Before you create actual purchase orders, view the detail lines of a proposal. Click View and select Purchase Orders.
- 3 The Summary dialog box displays. Click Okay. A list of virtual purchase orders displays, as shown in Figure 8.

Figure 8:
Summary
Dialog Box
Displaying
Virtual P/Os



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- 4 In the Proposal Profile window, click the Purchase Orders tab.
- 5 Click the line to highlight the purchase order. See Figure 9.

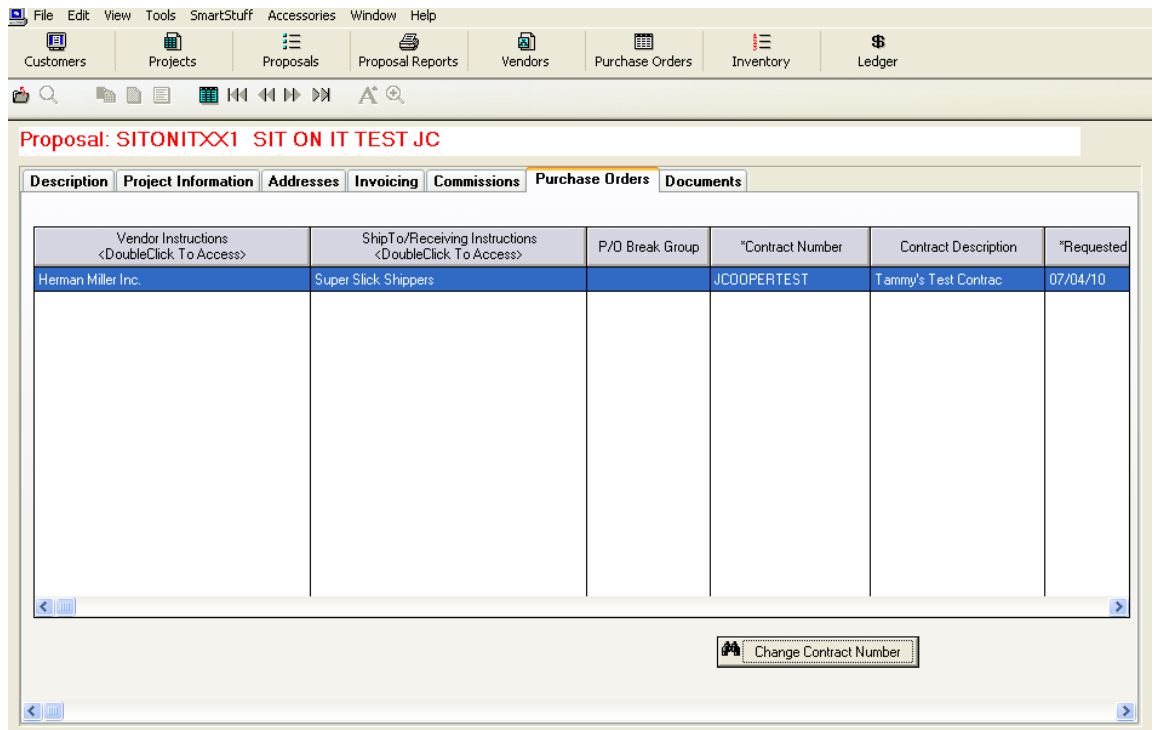


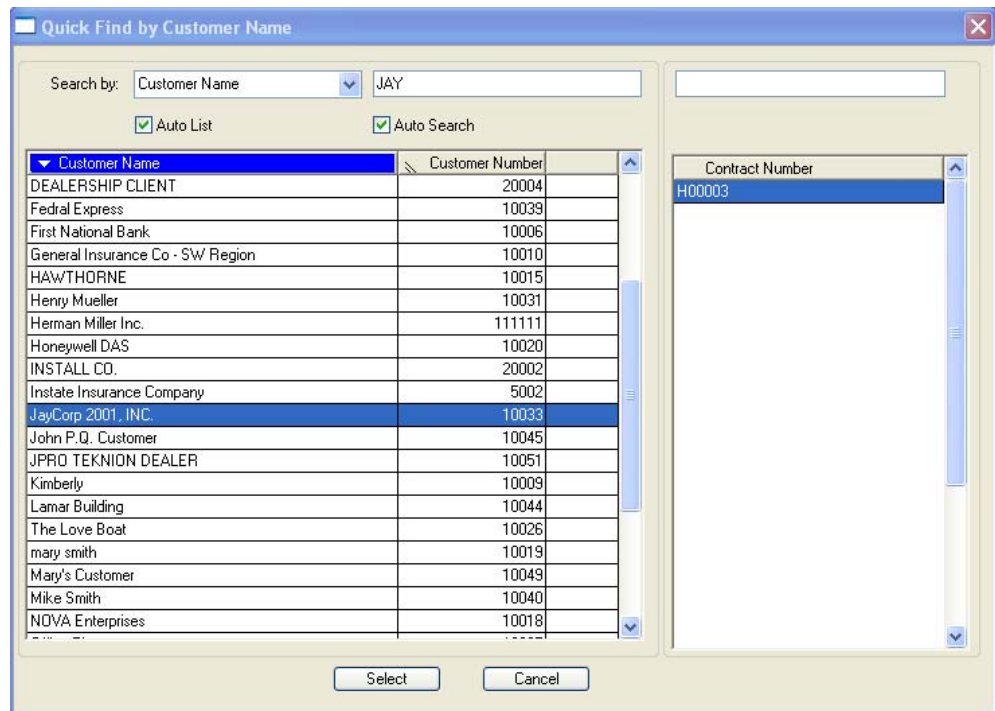
Figure 9: The Proposal Profile Purchase Order Tab

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- 6 Once the line is highlighted, click the Change Contract Number button. If you have stored the contract in a customer profile, it is available to select from the Quick Find. See Figure 10.

Note: The Change Contract Number Quick Find is tied to the Customer Contract Prices table. You may search for a contract by contract number, contract name, customer number, vendor name, or vendor number.

Figure 10: The Change Contract Number Quick Find Dialog Box



You may also enter a contract number by double clicking on the Contract Number box in the Proposal Profile Purchase Orders tab. See Figure 11.

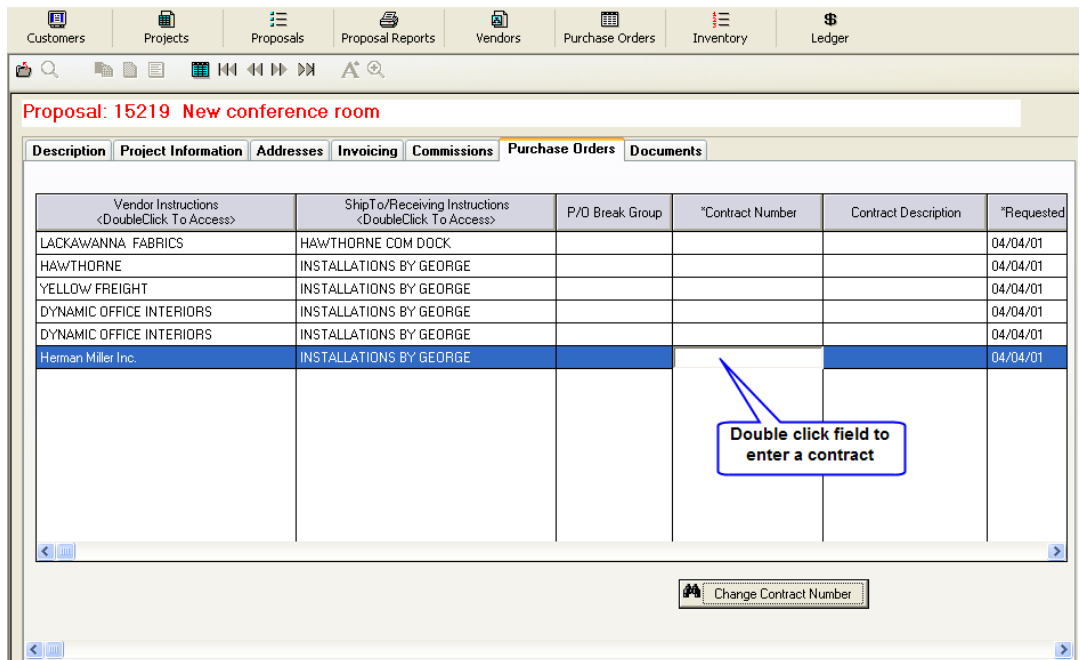
Note: You can only enter the contract number. Contract descriptions only populate if the contract number is stored in a customer profile and selected from the Change Contract Number Quick Find.

7 You can now create actual purchase orders by clicking Vendors, Purchase Orders, Transactions, Create Orders.

Unless a special contract has been attached to an HMI vendor purchase order, the default contract from System Configuration applies to the purchase order in the PSN Vendor Transmission window. You have the option to change the contract at the time of transmission; however, it will not update the Proposal Profile Purchase Orders tab.

Note: To change the contract on the Electronic Order Transmission Screen, you can manually enter the contract number or click the Search button next to the Contract box and select a contract that has been saved to a customer profile. See Figure 13 in **Transmitting P/Os to HMI Using PSN**.

**Figure 11:
Entering a
Contract
Number**



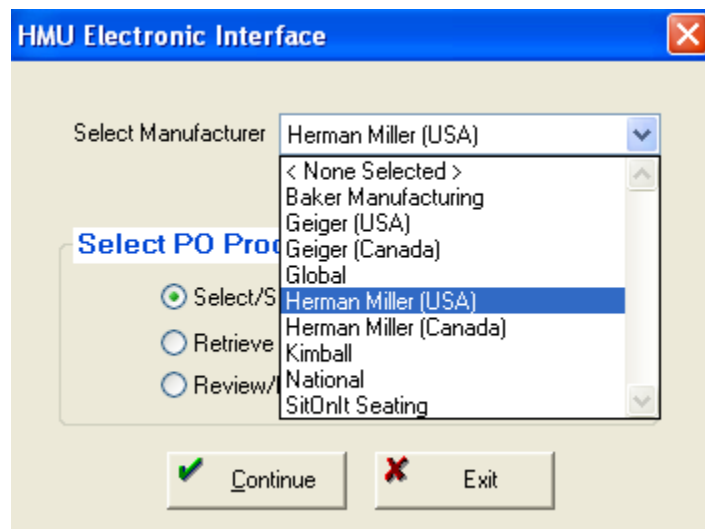
Creating the Purchase Order

- 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 HMI Using PSN

- 1 From the TeamDesign menu, click Vendors, PurchaseOrders, Electronic Interfaces, Herman Miller.
- 2 In the Electronic Interface dialog box, select your Herman Miller Alliance vendor.
- 3 Make sure the Select/Send Purchase Orders option is selected and click Continue. See Figure 12.

Figure 12: The Electronic Interface Dialog Box



4 The Electronic Purchase Order Transmission dialog box opens.

Note: In the Electronic Purchase Order Transmission dialog box, required boxes display in yellow. You must complete these boxes before you can transmit the order.

5 Enter the P/O number to transmit to HMI. If you cannot recall the number, click Select Purchase Order to open the Search Purchase Orders dialog box. The system displays information for the P/O you selected.

6 Click the Project/Contract tab. The Proposal Number box is populated with the proposal number associated with the purchase order. See Figure 13.

6.1 The Lead Time box defaults to 20 days. If your order consists of only quick ship items, you can select 10 days.

6.2 The Contract number box defaults to the number set in System Configuration. If a value is entered in the Proposal Profile Purchase Orders tab, this value overrides the default. If you need to change the value in this box, click Search and select the Contract number from the table.

The screenshot shows the 'Herman Miller Inc. (USA) Electronic Purchase Order Transmission' dialog box. At the top, there is a 'Select Purchase Order' button and a note: 'Note: Fields with yellow backgrounds are required!'. Below this are three input fields containing '99', '9', and '1908'. A tabbed interface is present with 'Project/Contract' selected, and other tabs include 'Sold-To', 'PO Ship-To', 'End Customer', and 'Miscellaneous'. The main form area contains the following fields: 'Proposal Number' (SITONITXX1), 'Lead Time' (radio buttons for 10 Days, 20 Days, and Assigned, with 20 Days selected), 'Contract Number' (A00000) with a 'Search' button, 'Contract Name' (Default Contract), 'Tier Volume' (1000), 'Order Type' (Dealer dropdown), and 'Agent/Sub-contractor'. At the bottom, there is a checkbox for 'View PO export file after transmission?' and three buttons: 'Clear Values', 'Send', and 'Exit'.

Figure 13: The Project/Contract Tab

- 8 Click the PO Ship-To tab. See Figure 15. In this tab, enter the ship to information for the purchase order.
 - 8.1 Enter the ship to name in the Name box.
 - 8.2 In the Address 1 box, enter the address for the customer.

Use the Address 2 box to enter the second line of long addresses. Do not enter notes in this box, for example, "Call James". This information is rejected as invalid, causing the order to be manually processed and delayed.
 - 8.3 Enter the city, state, and Zip code in the corresponding boxes.
 - 8.4 In the Contact Name and Phone Number boxes, enter the name of the person to contact about the order and their corresponding phone number.
 - 8.5 In the Country box, enter the 2 character country code. For the United States, type US

The screenshot shows a software window titled "HMI Industries Electronic Purchase Order Transmission". At the top, there is a "Select Purchase Order" dropdown menu and a note: "Note: Fields with yellow backgrounds are required". Below this, there are three input fields containing the numbers "2", "7", and "55866".

The main form has several tabs: "Project/Contract", "Sold-To", "PO Ship-To" (which is selected and highlighted in yellow), "End Customer", and "Miscellaneous".

The "PO Ship-To" tab contains the following fields and controls:

- Name:** The Office Furniture Dealership, Inc.
- Address 1:** 1234 ANYWHERE
- Address 2:** SUITE 000
- City:** Nashville
- State:** Tennessee (dropdown menu)
- Zip Code:** 12345-1234
- Contact Name:** John Doe (dropdown menu)
- Country:** US
- Phone #:** 800-555-1234
- Update Contact Names:** button
- Ship-to Attention-of:** empty text box
- Shipping Tag:** empty text box
- Call Before Delivery?:**
- Hours Before:** radio buttons for 24 Hours, 48 Hours, and 72 Hours
- Delivery Contact Name:** empty dropdown menu
- Delivery Phone #:** - -
- Update Deliver-to Names:** button

At the bottom of the form, there is a checkbox for "View PO export file after transmission?".

At the very bottom, there are three buttons: "Clear Values", "Send", and "Exit".

Figure 15: The PO Ship-To Tab

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- 8.6** In the Shipping Tag box, enter any notes about the order, for example, who to call or which door to use for the delivery. This box is not required.
- 8.7** The Call Before Delivery service is a specialized service with HMI. Contact HMI for more information. If you subscribe to the service, click this check box to receive a phone call before your delivery. If this box is checked, the Hours Before, Delivery Contact Name, and Delivery Phone # are required.
- 9** Click the End Customer tab, and use it to enter information for the end customer. See Figure 16.
 - 9.1** Enter the end customer name in the Name box.
 - 9.2** The default end customer address is pulled from the Addresses tab of the proposal profile. You can make changes by entering the address for the end customer in the Address 1, Address 2, City, State, Zip Code, and Country boxes.

Note: The Country box pulls from System Configuration. Type **US** for United States or **CA** for Canada.

The screenshot shows a software window titled "HMI Industries Electronic Purchase Order Transmission". At the top, there is a "Select Purchase Order" dropdown menu and a red note: "Note: Fields with yellow backgrounds are required!". Below this, there are three input fields containing the numbers "2", "7", and "55866". A tabbed interface is visible with tabs for "Project/Contract", "Sold-To", "PO Ship-To", "End Customer" (which is selected and highlighted in yellow), and "Miscellaneous". The "End Customer" tab contains several form fields: "Name" (End Customer), "Address 1" (555 Blue Street), "Address 2" (empty), "City" (Nashville), "State" (Tennessee), "Zip Code" (12345-1234), and "Country" (US). Below these are fields for "Contact Name" (Lucy Buyer), "Contact Phone" (800-444-1234), "Customer PO #" (123456), "DUNS #" (empty), and "U.S. Comm. EIN/TIN #" (empty). At the bottom of the form, there is a checkbox labeled "View PO export file after transmission?". Three buttons are located at the very bottom: "Clear Values", "Send", and "Exit".

Figure 16: The End Customer Tab

9.3 In the Contact Name and Contact Phone box, enter the name of the person to contact about the order and their corresponding phone number. These boxes default to the buyer and buyer phone on the proposal.

9.4 The Customer PO # box is populated with the P/O number from the proposal. Update as necessary. This box is required.

Note: HMI only accepts 20 character purchase order numbers. If the P/O number is longer than 20 characters, it is truncated here.

9.5 Fill in the remaining boxes as applicable.

10 Click the Miscellaneous tab to enter special instructions or order notes.

10.1 Check the Health Care box if the P/O has a health care contract number. Leave the box blank if the P/O is not for a health care contract. Once this box is checked, you must enter the end user ID in the Health Care End User ID box. See Figure 17.

The screenshot shows the 'Miscellaneous' tab of the 'HMI Industries Electronic Purchase Order Transmission' window. At the top, there is a 'Select Purchase Order' button and a note: 'Note: Fields with yellow backgrounds are required!'. Below this, there are three input fields containing the values '2', '7', and '55866'. A tabbed interface shows 'Miscellaneous' as the active tab. The 'Health Care?' checkbox is checked. The 'Health Care End User ID' field is highlighted in yellow. The 'Order Currency' field contains 'USD'. There is a large text area for 'Line Item Validation Override Reason' and another for 'Order Notes'. At the bottom, there is a checkbox for 'View PO export file after transmission?' and three buttons: 'Clear Values', 'Send', and 'Exit'.

Figure 17: The Miscellaneous Tab

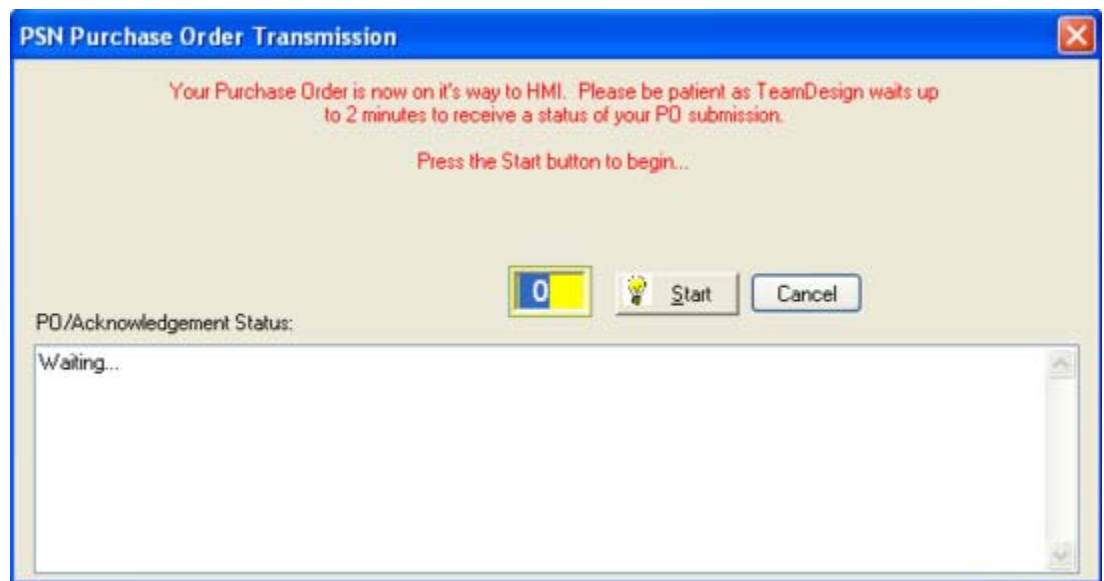
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- 10.2** In the Order Currency box, enter the currency in which the order is processed. For orders using the United States Dollar, type **USD**.
- 10.3** The Line Item Validation Override Reason is used only for special orders. Placing any text in this box delays your order. Make sure to only use this for approved reasons. For more information, contact HMI.
- 10.4** Use the Order Notes to enter information for internal use. This information is not reviewed by Herman Miller.
- 11** When you finish entering information, click the View PO Export File After Transmission to view the data transmitted to HMI or leave this box blank to not view the export file.

Note: When working with technical support, you may be asked to use this feature.

- 12** Click Send.
- 13** The PSN Purchase Order Transmission dialog box opens, as shown in Figure 18. Click Start.
- 14** The purchase order is transmitted. When the order is transmitted to the HMI Kiosk Order Manager, it is prevalidated. If all line items are valid, you receive a message stating the order was successfully generated and transmitted. For valid orders, the purchase order Acknowledgment Number box in TeamDesign indicates that the order was accepted.

Figure 18: The PSN Purchase Order Transmission Dialog Box



If there are any invalid line items, the functional acknowledgment displays the reasons the P/O is invalid in the exceptions screen and the order is placed on hold.

Exceptions are saved in the PSNOUT Log folder. You can also print the exceptions. For invalid orders, the purchase order's Acknowledgement Number box in TeamDesign indicates the order was rejected.

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

Note: You must submit purchase orders one at a time.

Retrieving PSN Acknowledgments

- 1 From the TeamDesign menu, click Vendors, PurchaseOrders, Electronic Interfaces, Herman Miller.
- 2 In the HMI 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.

Note: Acknowledgments only display for the P/Os sent by the user who is currently logged in.


Once the acknowledgments are retrieved, the Acknowledgement Number box for each purchase order lists the actual acknowledgement number.

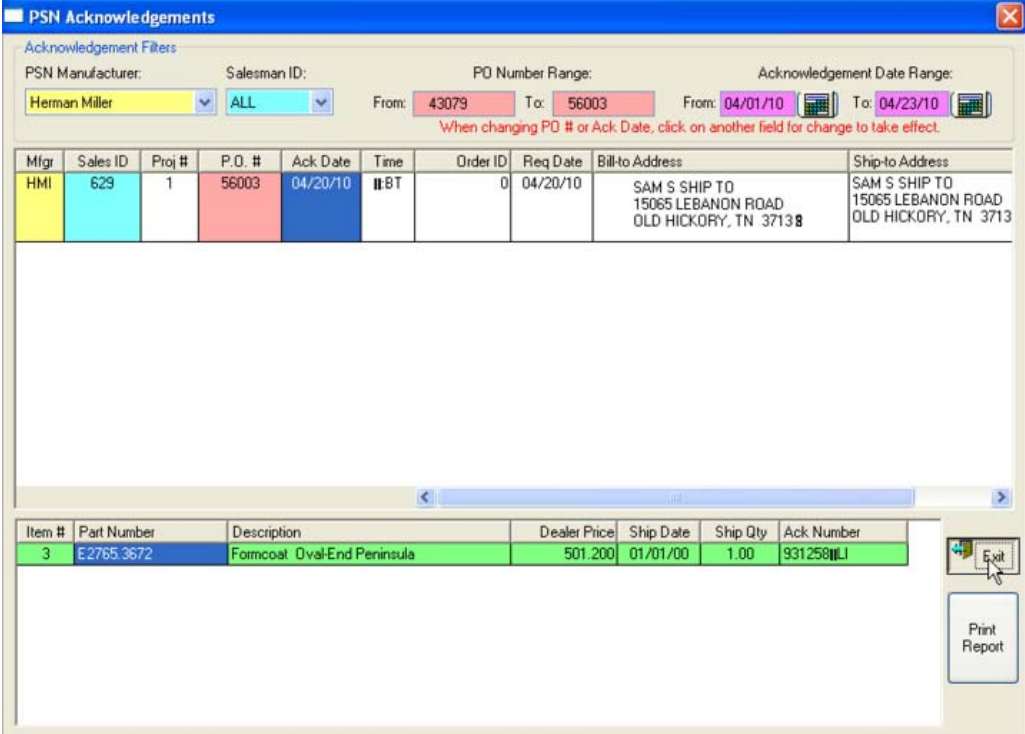
Acknowledgments are not currently available for SitOnIt.

Reviewing/Printing PSN Acknowledgments

- 1 From the TeamDesign menu, click Vendors, PurchaseOrders, Electronic Interfaces, HMI.
- 2 In the Electronic Interface window, click the Review/Print Acknowledgments option.

Note: Using this option, you can view all acknowledgments that have previously been retrieved, regardless of user.

- 3 Click Okay.
- 4 The PSN Acknowledgments dialog box opens. Click the down arrow in the PSN Manufacturer box and select HMI, as shown in Figure 19.
- 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 .



PSN Acknowledgments

Acknowledgement Filters

PSN Manufacturer: **Herman Miller** Salesman ID: **ALL** PO Number Range: From: **43079** To: **56003** Acknowledgement Date Range: From: **04/01/10** To: **04/23/10**

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

Migr	Sales ID	Proj #	P.O. #	Ack Date	Time	Order ID	Req Date	Bill-to Address	Ship-to Address
HMI	629	1	56003	04/20/10	II BT	0	04/20/10	SAM S SHIP TO 15065 LEBANON ROAD OLD HICKORY, TN 37138	SAM S SHIP TO 15065 LEBANON ROAD OLD HICKORY, TN 3713

Item #	Part Number	Description	Dealer Price	Ship Date	Ship Qty	Ack Number
3	E2765.3672	Formcoat Oval-End Peninsula	501.200	01/01/00	1.00	931258

Exit
Print Report

Figure 19: The PSN Acknowledgment Dialog Box

- 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. See Figure 20. 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 attribute code.
- 10 When you finish, click Exit.

Figure 20: The PSN Acknowledgment Dialog Box

Printed: 4/23/2010 11:42:06AM

Herman Miller Acknowledgement Review
KELLER QA
 For Salesman ID: All
 Review Date Range: 04/01/10 - 04/23/10

Page: 1
DEVELOPERS

Purchase Order: 020-1-50003
 Acknowledgement: Transmitted ON: 04/20/10 AT:

Sold To: Ship To: SAM S SHIP TO (0)
 15065 LEBANON ROAD
 STE 794
 OLD HICKORY, TN 37138

Line #	Qty	Catalog Number	Description	Mfg Code	Vendor	Del. Date	Unit Cost
1	1	AE113PWB	+Wk Chr Aeron Std:Ht Pneu. Til Lim/Ang Fixed Arms Nenup Attributes: AJ +adjustable lum bar support (Attribute Mismatch) 01 +graphite (Attribute Mismatch) BB +2 1/2 hard caster black yoke carpet BK +black (Attribute Mismatch) 3D +pellicle classic (Attribute Mismatch) 01 +pellicle classic carbon (Attribute Mismatch)	HST	2487		0.00
			Ack Discrepancies: Ack for this line item was NOT found! No attributes were returned for this line item!				
2	1	RE10F	+Wk Chr Reaction Std Seat/Tilt Fixed Arms Attributes: BB +2 1/2 hard caster black yoke carpet BK +black (Attribute Mismatch) 3A +moine -Pr C at 2 (Attribute Mismatch) 02 +moine bs cotti (Attribute Mismatch)	HST	2487		0.00
			Ack Discrepancies: Ack for this line item was NOT found! No attributes were returned for this line item!				
3	1	E2705.3672	+Peninsula Formcoat Oval-End 36D 72W Attributes: 0Q +folkstone grey (Attribute Mismatch) BU +black umber (Attribute Mismatch) NN +none (Attribute Mismatch) SM +on module (Attribute Mismatch)	HEI	2487		0.00
			Ack Discrepancies: Ack Part Number = E2705.3672 Ack Dealer Cost = 501.200				

S:\BACKUPS\KELLERQA\reports\AK0035.rpt

Resending PSN Purchase Orders

If you need to cancel or change a submitted purchase order, you must telephone your HMI 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 HMI with the appropriate changes.