Tips, Tricks & Secrets
For Using the SN <-> e-automate Connection
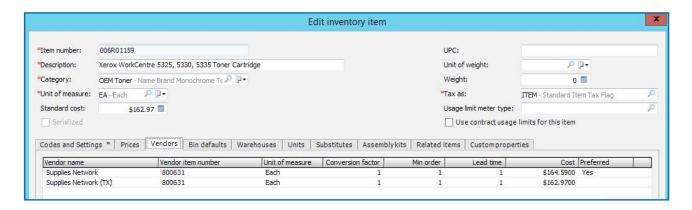
Q. What does the integration with SN offer?

A. **In short, everything!** All electronic transactions are supported …po's, po confirmations, ship notices, and invoices. Further, real time price & stock checks and even our ATRS / MPS program are included in the integration.

Q. How does it work, and how do I get started?

A. Please note that you'll **need to have e-automate's PO Processor and PO Receiver modules** to connect with vendors. Assuming you already do, the connection works with **3 simple numbers from SN:** Organization ID, Transmission ID and Contact ID. To get started, simply contact your Account Manager to connect with SN, and the ball will get rolling from there.

Q. To transmit po's, what SN part numbers do I need to load into my e-automate system, and how do I do that?

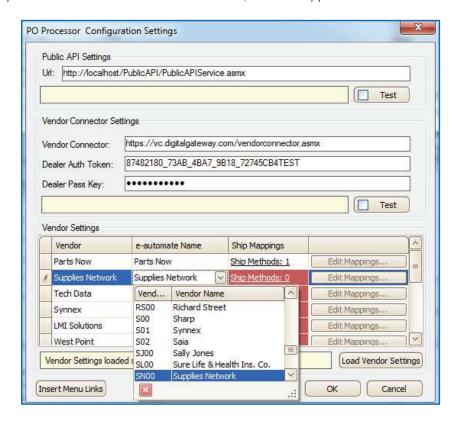**A.** Behind the scenes, to ensure an accurate part match, e-automate transmits the SN part reference number, not the MFR oem number. Be sure to enter **SN's part reference number as the "Vendor item number."** in the part's set up screen as shown below. Note, if loading supply items for the first time, you can upload part data en mass. Contact e-automate Support for more info.

Q. I tried to transmit a po but received the error "There are no items to query prices on" … where's the knot and how do I untie it?

A. This is typically **caused by one of two issues**. Either A) the **vendor number is incorrect for SN** on the Vendors tab of the e-automate item record (see above), or B) you **do not have SN properly mapped to your e-automate SN vendor record**.

To properly map SN, open PO Processor, click File > Connection Settings, and click "Load Vendor Settings." From this screen and as shown below, drop down the "e-automate Name" column, select "Supplies Network" and click "OK".

Q. How do I select shipping method, or make special "rush" shipment requests when transmitting po's?

A. Our shipping algorithms **automatically select the ship method for routine po's based on settings SN has put in place per your/your customers' needs** as communicated to your SN Rep. However, **to flag a PO for rush/special handling, simply add a text comment to the "PO Instructions" field** when transmitting to SN. The comment will defer the order and your SN Rep will handle as you instruct.

Q. Sometimes when I transmit a PO an item comes back 0 filled, however, I did a stock check and see you have stock available in your other Distribution Centers. Can something be done so that it will automatically fill from another of your DCs?

A. Yes. We have the ability to turn on what we call "Auto Cross Ship." Auto Cross Ship will automatically pull stock and fill the order from the DC that is next closest to the destination of the package. Please contact your SN Rep about utilizing this feature on your account.

Q. I want to use SN's ATRS system to flow supply notifications into my e-automate system. How does that work and what do I need to do?

A. Congratulations, this is truly exciting technology that integrates the entire process for maximum efficiency! **Once set up, low toner / re-supply notifications will automatically flow into your e-automate system and be converted to sales orders, which can then be issued as po's and transmitted. In response, you'll automatically receive an order confirmation, shipment notification and invoice, all electronically.** The supply business doesn't get any more efficient than that!

First, you'll need to provide your e-automate equipment ID to SN for the machines that will be monitored. SN will provide a spreadsheet of devices for this purpose. **Next, contact** *eaaddons@ecisolutions.com* **and provide:**

- **Your e-automate PIP URL.** Note – This address must be accessible from outside your local network.
- An **e-automate username and password** (preferably with administrative rights).
- Your **CompanyID**.
- The **email of a company contact** whom you want to be notified when an ATRS order is generated. This is optional, but recommended for initial go live and can be turned off later if desired.

If you would like assistance locating any of the above info, please contact *eaaddons@ecisolutions.com*.

You're almost there. To be able to process SN ATRS notifications into sales orders, you'll need to **modify your "Web.Config" file**. No, this won't hurt, and no, you don't need to be a Programmer (afterwards, however, you'll be tempted to make that claim!).

You can find your web.config file on the same web server that hosts PIP in "C:\inetpub\wwwroot\Public API\web.config". Once you locate the file, open it in Notepad by right clicking your mouse and selecting Notepad. Next, fill in the values with those shown in the highlighted areas below, save and close the file. See, you're now a Programmer! ;-)

```xml
<?xml version="1.0" encoding="UTF-8"?>
<configuration>
    <appSettings>
        <!-- Function Specific Settings -->
            <add key="addResupplyNotification.EachUOMCode" value="EA"/>
            <add key="addResupplyNotification.InventoryCode" value="SUP" />
            <add key="addResupplyNotification.SalesCode" value="SUP" />
        <add key="addResupplyNotification.Category" value="SUP" />
        <add key="addSupply.InventoryCode" value="SUP" />
        <add key="addSupply.ServiceCode" value="SUP" />
        <add key="addSupply.SalesCode" value="SUP" />
        <add key="addSupply.Category" value="NON" />
        <add key="addPart.InventoryCode" value="PRT" />
        <add key="addPart.ServiceCode" value="PRT" />
        <add key="addPart.SalesCode" value="PRT" />
        <add key="addPart.Category" value="O" />
            <add key="SalesOrder.SalesRep" value="BRO1" />
            <!--
            The setting ItemUsageForSalesSetting will specify how the
            eautomate customer wants to enter Details into Sales Orders.
            They can choose one of three settings:
                GENERIC:        Each line item on a sales order will use the same Item Number.
                                    The description for these Items will be changed to match what
                                    is actually being purchased.
                ADDITEM:        All Items will be insterted into eautomate before being added
                                    to a Sales order if they don't already exist in the e-automate database.
                INSPO:          All Items will be insterted into eautomate before being added
                                    to a Sales order if they don't already exist in the e-automate database.
                                    And a PO will also be created*** not implemented

            -->
            <add key="ItemUsageForSalesSetting" value="ADDITEM" />
            <!--
            The setting GenericItemForSalesSetting will specify the Item number to be
            used on Sales Orders placed through the PIP when the setting
            ItemUsageForSales.SalesRep has a value of 'GENERIC'
            -->
            <add key="GenericItemForSalesSetting" value="GEN-1000" />

        <!-- ====================
            PO Defaults
            ==================== -->
        <!--
            The DropShipDefaultwarehouse/Bin values will specify the default warehouse
        and Bin to use for POs created for automated dropship orders. It is
        recommended that a DropShip warehouse is created in e-automate and specified here.
            -->
        <add key="DropShipDefaultwarehouse" value="Drop-Ship" />
        <add key="DropShipDefaultBin" value="Drop-Ship" />
```