

# ORDER POWER!

## Mailing List Management

**User Guide**

**Release 3.3.2**



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# Mailing List Management

The mailing list is an important asset of the Catalog / Mail Order company. Use the mailing list to add new customers or change old customer information. Since mailings are expensive, **Mail List Management** administers the list to reduce redundancy, track inactive customers, provide for selective label printing, and trace performance by customer and source code. Additionally, **Mail List Management** provides extra files to keep prospective customer records separate from the house list.

LM01 CSIUSER	Computer Solutions Inc. ORDER POWER! Mailing List Management	5/04/99 DSP101S1
Select one of the following :		
<ol style="list-style-type: none"> <li>1. Work with Mailing List</li> <li>2. Possible Duplicate Listing</li> <li>3. Mailing List Count</li> <li>4. Mail List Label Selection</li> <li>5. Catalog Request Label Selection</li> <li>6. Print Labels</li> <li>7. Clear Label Selection</li> <li>8. Label Selection Count</li> <li>9. Mailing List Count by Media</li> <li>10. Credit Memo Count by Customer</li> <li>11. Combine Customer Activity</li> </ol>		
		More...
Selection ==>		
F1=Help F3=Exit F9=Command Line F12=Cancel Copyright 1999 Computer Solutions, Inc. Version 3.3		

*ORDER POWER! Mailing List Management panel 1 (figure 1)*

MLM01 CSIUSER	Computer Solutions Inc. ORDER POWER! Mailing List Management	5/04/99 DSP101S1
Select one of the following :		
<ol style="list-style-type: none"> <li>21. Work with Prospect File</li> <li>22. Prospect File Label Selection</li> <li>23. Prospect File Catalog Request Label Selection</li> <li>24. Print Prospect File Labels</li> <li>25. Clear Prospect File Label Selection</li> <li>26. Prospect File Label Selection Count</li> </ol>		
		More...
Selection ==>		
F1=Help F3=Exit F9=Command Line F12=Cancel Copyright 1999 Computer Solutions, Inc. Version 3.3		

*ORDER POWER! Mailing List Management panel 2 (figure 2)*

## Work with Mailing List

Use the maintenance function, to add, change, or delete customers in the database. You can control the initial field position and protect certain fields on this panel to streamline maintenance. See the “Mailing List Defaults in the Company Profile” on page 48.

### **To search for a customer record in the mailing list**

Locate an existing customer’s record by searching for a zip code, a last name or partial last name, a full or partial primary telephone number, an account number, a company name, a company-defined search key (such as social security number or member number), and/or a tender number. To define which fields are the primary search fields see the “Mailing List Defaults in the Company Profile” on page 48. When multiple entries are made on the selection panel, **ORDER POWER!** searches using the last entry,

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö Work with Mailing List** to display *Mail List Selection panel (figure 3)*.

**Computer Solutions Inc.**  
**Mail List Selection**

Select one of the following :

- Zip Code
- Telephone - Primary
- Company Name
- Last Name
- Customer Number
- ?Prospect Number
- Federal ID
- Tender Number

F1=Help F2=Unprotect F3=Exit F4=?List F6=Create F12=Cancel F21=Print List

*Mail List Selection panel (figure 3)*



For both the Company Name and the Last Name searches, **ORDER POWER!** displays only customers whose names begin with the same characters specified. These searches do not list all customers whose names follows alphabetically

2. Only in the cases of **Last Name** combined with **Zip Code** and **Company Name** combined with **Zip Code** will **ORDER POWER!** use multiple fields to conduct a search. Complete one or more of the following fields:

#### **Zip Code**

Type the customer’s zip code or partial zip code. Entries with the same zip code will be sorted by either the **Company Name** or the **Customer Name** depending on which parameter is chosen in the **Company Profile**. (See the “Mailing List Defaults in the Company Profile” on page 48.)

#### **Telephone - Primary**

Type the customer’s telephone number or partial number.

#### **Company Name**

Type the name or partial name, which refers to the search company.

#### **Last Name**

Type the customer’s last name or partial name.

### Customer Number

Type the customer number or partial number.

### Tender Number

Type the tender number that appears on the most recent order. For example, type the check number, credit card number, or the gift certificate number. Only if the Retain Last Tender flag is set to **Yes** and the Tender Number Search is enabled in the **Company Profile**, will the **Tender Number** field appear on the selection panel. See the Mailing List Defaults in the Company Profile on page 48.



3. Press **Enter** to display the *Mail List Inquiry* panel (figure 4).

An address hygiene software product, Group 1 Code-1 Software, integrates with **ORDER POWER!** to verify addresses against standard United States postal addresses.

Computer Solutions Inc.				
Mail List Inquiry				
Show Delete : N				
2=Change 5=Display 6=Contract Pricing 7=Notes 8=Open Orders 9=History 10=AR				
11=Ship to Customers 12=Address Changes 13=Trading Profile 14=Contacts				
15=Order Interface				
Name/Company	Address	City/State	Customer #	D
— I M VANDERBULITWALLA	123 tycoon Lane	Miami FL	34	
— I DR EDDIE SOTO	123 SW 123rd Ave	Miami FL	42	
— I MISS JAYME C FILMORE	44 Benedict Circle	Hialeah FL	59	
— I Mariela Borden	572 Nw 154 Circle	Miami FL	75	
— I MR GLEN MORRISON	1419 Maharris Rd	Beverly H CA	83	
— O JOE BLUE	11 1 RR	MIAMI FL	88	
— O LESLIE PULNVER	1504 S. 7TH	BEVERLY H CA	90	
— S WILLIAM BLACK	1168 SW 136th	Hialeah FL	109	
— O CSI	P O Box 9090	Miami FL	117	
— S Campbe11 Stores	98 Central Avenue	HIALEAH FL	141	
— I CUSTOMER USED IN AR DETAIL	157 Riverside	Panama Ci FL	208	
— O Ms Harriet Smithson	155 Main Street	Bakersfie CA	257	
— O John Nero	6187 NW 167th St S	Miami FL	265	
— I new Customer Number	4242 NW 33re Pl.	Ft. Laud FL	267	
— I Luis R Larrazabal	Calle Sur Pripical	Caracas	273	
				More...

F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F11=Fold F12=Cancel F21=Print

Mail List Inquiry panel (figure 4)

This panel displays a list of customers in the **Mailing List** master file. The **Name Type** field located to the left of the **Name/Company** field above indicates how or why the customer was added to the mailing List

- Inquirer** Prospective customers added directly from the Mailing List function, usually customers who have called to request a catalog.
- Order** Customers added during **Order Entry** when they placed an order.
- Ship to** Customers added to the database when another customer had merchandise sent to them. (These customers were originally ship to customers on an order.)

A customer maintains this designation for the entire time the customer is in the database even if there are orders placed against them. This is useful to track how often you convert **Inquiry** and **Ship to** customers to **Ordering** customers.

The **Name/Company** column lists either the customer’s name or customer’s company name depending on what you chose in the **Company Profile**. (See the “Mailing List Defaults in the Company Profile” on page 48.) Press **F11=Fold** to display the name/company column, the alternate name.

You can perform the following functions on a customer record:

Action	Description
2=Change	Display the <i>Mail List Update panel 1</i> (figure 5)
5=Display	Display the <i>Mail List Display window</i> (figure 9)
6=Contract	Display <i>Contract Pricing Inquiry window</i> (figure 10).
7=Notes	Display the <i>Customer Note Inquiry window</i> (figure 11)
8=Open Orders	Display the <i>Order Inquiry (Active Orders) panel</i> (figure 12)
9=History	Display the <i>Order Inquiry (Shipped Orders) panel</i> (figure 13)
10=AR	Display the <i>AR Inquiry SUMMARY panel</i> (figure 14)
11=Ship to Customers	Display the <i>Mail List Ship To Customers window</i> (figure 15).
12=Address Changes	Display the <i>Address Change Inquiry window</i> (figure 16).
13=Trading Profile	Display the <i>Trading Partner Inquiry window</i> (figure 17).
14=Contacts	Display the <i>Mailing List Contacts window</i> (figure 18).
15=Order Interface	Display the <i>Order Interface Company Inquiry window</i> (figure 19).
F6=Create	Display the <i>Mail List Update panel 1</i> (figure 5).

### ***Maintaining customers on the Mailing List.***

Add, change, or delete a customer or customer information in the list. When a new name is added to the list **ORDER POWER!** searches and alerts you if a similar name exists.

#### ***To add a customer to the mailing list***

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Work with Mailing List** **Ö** **F6=Create** to display the *Mail List Update panel 1* (figure 5).

-or-

#### ***To make changes to a customer to the mailing list***

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel* (figure 3) to work with. Then press **Enter** to display the *Mail List Inquiry panel* (figure 4). Type **2=Change** beside the customer whose information you want to change, then press **Enter** to display the *Mail List Update panel 1* (figure 5).

Computer Solutions Inc. Mail List Update					
Customer Number	9473				
Name	CSI's Favorite Customer		Search Last Name CUSTOMER		
Position			Search Company		
Company					
Address	6187 NW 167TH ST STE H33				
City, ?State	Miami _____, FL				
Zip Code, ?Country	33051-4353 , US				
Telephones	PRIMARY	Ext	SECONDARY	Ext	Fax
E-Mail Address	305-558-7000		954-463-3909		53 305-557-0003
?Demographic Code	Mail@csiflorida.com				
Abbreviation	DS	TE	PR	NM	5 TD 7 8 9 10 11 12 13 14 15 16 17 18 19 20
?Added By			?Original Media CATALOG99		
Added	111198		?Name Type I		
?Label Request	Printed _ Y/N		?Prefer Ship Via UPS		
	Date		Delete		
F1=Help	F2=Unprotect	F3=Exit	F4=?List	F5=Bypass Group1	F9=Retrieve F10=Add'l
F11=Ship Tos	F12=Cancel	F13=Defaults	F14=Cust Notes	F23=User	

Mail List Update panel 1 (figure 5)

2. Complete the following fields as necessary:

**Name** (required)

Type the customer's name.

**Search Last Name**

Type the last name you want, or leave the field blank and **ORDER POWER!** will automatically choose one.

**Position**

Type the individual's job or title.

**Company**

Type the company name, which identifies the company as the customer. Both a customer name and company name can be specified for a single **Mail List** customer record. Some **ORDER POWER!** panels display both a customer and company name, if applicable. However, when a panel only displays one name for the customer, the **Company Name** overrides **Customer Name**. The flag in the **Company Profile** determines which field to sort and show.

**Search Company**

Type the company name you want, or leave the field blank and **ORDER POWER!** will automatically choose one.

**Address** (required)

Type the customer's address.

**City/State** (required)

Type the city and state part of the customer's address. Or, leave the **City** and **State** fields blank and **ORDER POWER!** will automatically backfill the **City** and **State** fields based on the **Zip Code**.

**Zip Code/Country** (required)

Type the customer's zip code.



**Telephones: Primary/Secondary/Fax**

Type the customer's telephone number(s). The labels for the first (primary) and second (secondary) telephone numbers fields are user-defined. See the "Mailing List Defaults in the Company Profile" on page 48.

**Demographics Codes**

Type the codes, which identify customer traits to be used for subsequent analysis and segmentation. Up to twenty company-defined demographic codes can be applied to each name in the mailing list. Each demographic code is defined with a set of valid responses. All entries are validated against the **Demographic Code** master file.

**Added By**

Type the salesperson who took the order or catalog request.

**Added**

**ORDER POWER!** records the date the customer record was added to the customer database. However, you can override this date.

**Label Request**

Type the code, which groups customers for catalog request label printing purposes. During label printing selection, you can choose to print labels only for customers with a specific label request codes.



The Label Type field on the *Mail List Label Print panel (figure 25)* must be set to **2** designating a catalog request label at print time in order for catalog labels to be selected and these fields to be updated.

**Printed/Printed Date**

These two fields show if and when a catalog request label was printed for this customer. The printed flag is initially set to **No** when you add a customer. **ORDER POWER!** changes the flag to **Yes**, when the first catalog request label is printed. If required, you can reset the flag to **No** manually to print another catalog request label. **ORDER POWER!** updates the printed date with the current system date, when catalog request labels are printed.

**Original Media**

Type the code which reflects the **Media** code of the catalog or advertisement that attracted the buyer or catalog requestor. Or accept the default media code defined in the **Company Profile Order Entry** options.

**Prefer Ship Via**

Type the preferred method of shipping to indicate which method and carrier should take precedence when shipping to that customer.

**Delete**

Indicate whether the customer records will be kept.

- Y** (yes) removes the customer's record from the mailing list and suspends the ability to place an order for the customer. This is only a soft delete which allows the customer to be reactivated at any time. Existing orders will still be processed.
- N** (no) maintains the record as is

3. Press **Enter** to update the **Mailing List**.

During the addition of a new customer, **ORDER POWER!** will alert you when a similar name already exists. Then you have the option of continuing with the addition of the new name or updating a customer listed as a potential duplicate. **ORDER POWER!** displays the following panel when potential duplicate customers are detected

```

Computer Solutions Inc.
Mail List Update
Customer Number      9473
Name                 CSI's FAVORITE CUSTOMER
Position
Company
Address              6187 NW 167th St
Search Last Name
Search Company

Possible Duplicate Mail List Inquiry
1=Select 2=Change/Select 5=Display

Name/Company        Address          City, State  Match Code
I CSI's Favorite Customer  6187 NW 167 Street Miami    FL 3301561CU

F1=Help  F3=Exit  F7=Rkwd  F8=Fwd  F10=Tnn  F12=Cancel
Bottom

```

Possible Duplicate Mail List Inquiry window (figure 6)

**Match Code**

**ORDER POWER!** determines a duplicate or match by creating a **Match Code**. The **Match Code** consists of **ZZZZZAANN**. Where,  
**ZZZZZ** represents the five digits of the customer's zip code  
**AA** represents the first two characters of the customer's address  
**NN** represents the first two characters of the customers last name

4. Determine whether the possible duplicate is valid then choose one of the following options:
  - Press **Enter** to add the possible duplicate to the mailing list.
  - or-
  - Press **F3=Exit** to *not* add the new customer and return to the *Mail List Update panel 1 (figure 5)*.
  - or-
  - Determine which original customer to update. Type **2=Change/Select** and then press **Enter** to redisplay the *Mail List Update panel 1 (figure 5)* which will contain the original customer's information.

**To add Additional Information to a Customer in the Mailing List**

1. From the *Mail List Update panel 1 (figure 5)* press **F10=Add'I** to display the *Mail List Update panel 2 (figure 7)*.

Computer Solutions Inc. Mail List Update			
Customer Number	9473	Name	CSI's Favorite Customer
Type		Region	
?Customer Class	EMP	?Alert Class	
SIC Code		Discount	
Tax Exempt Id 1		Tax Exempt Id 2	A/P
?Payment Terms	N30	?Billing Customer	
Credit Limit		Action Code	
Late Charge		Action Date	
Statements	N	PO Required	N Y/N
Backorders	Y	First Order Date	12/11/98
Mail Exclusion	N		
Invoice By			
Ship Segment	Y		
F1=Help F3=Exit F4=?List F12=Cancel F14=Cust Notes F23=User			

Mail List Update panel 2 (figure 7)

2. Complete these fields:

**Type**

Type the free-formatted code used to group customers for reporting and printing purposes.

**Region**

Type the free-formatted code used to group customers for reporting and printing purposes. **Region** can be used to group customers by geographical or sales territories.

**Customer Class**

Type the code used to identify a group or category of customer. You can remove or override the default customer class code as required. **Customer Class** affects both pricing and reporting.

**Alert Class**

Type the alert code used to identify special situations concerning a customer. Certain alert classes may suspend or halt further order processing. When tagged in a customer's record, the corresponding **Alert Class** message blinks on the screen to capture the operator's attention.

**SIC Code**

Type the **Standard Industrial Classification** code used to categorize companies into different industrial groupings. **SIC** codes are defined by the U.S. Department of Commerce.

**Discount**

Type a number to specify any applicable discount. In the **A/P** field, indicate if this number is an **(A)**mount or **(P)**ercentage.

**Tax Exempt Id 1 / 2**

Type a unique identification number assigned by a state to a person or business.

**Payment Terms**

Type the code, which defines payment periods and conditions and are used to

calculate due dates and cash discounts.



To establish default Payment Terms, Credit Limits and Late Charges, see the “Mailing List Defaults in the Company Profile” on page 48.

#### **Credit Limit**

Type the customer’s credit limit. If the **Credit Limit** is exceeded an error message will appear at **Order Entry** time. Zero credit limit may indicate either a zero credit limit or unlimited credit. See the “Mailing List Defaults in the Company Profile” on page 48.

#### **Billing Customer**

Type the billing customer (who must be an existing customer).  
**ORDER POWER!** **Order Entry** defaults to the **Ordered By** customer if you do not enter a **Billing Customer**.

#### **Late Charge**

Type the charge applied to any outstanding or past due Accounts Receivable account balances. In the **A/P** field indicate if this number is an **(A)**mount or **(P)**ercent

#### **Action Code**

Currently the action code is not used by any standard **ORDER POWER!** function. The field is reserved for future enhancements.

#### **Action Date**

The action date specifies the date an action is to be performed for the Mail List Customer record. Currently the action date is not used by any standard **ORDER POWER!** function. The field is reserved for future enhancements.

#### **Statements**

Indicate whether the customer should be sent an **Accounts Receivable** statement.

- Y (yes) send a statement
- N (no) not send a statement

#### **Backorders**

Indicate whether the customer will or will not accept back ordered merchandise.

- Y (yes) accept partial shipments and backordered merchandise
- N (no) do not send backordered merchandise. If the customer chooses not to accept backordered merchandise, any merchandise not shipped after the first shipment will be automatically cancelled during **Shipment Confirmation**.

#### **Mail Exclusion**

Indicate the customer’s preference for receiving additional mailings.

- Y (yes) send additional mailings
- N (no) do not send additional mailings

#### **PO Required**

Indicate the customer’s requirement for adding a Purchase Order number to each order during Order Entry.

- Y (yes) requires that a Purchase Order number be entered during Order Entry
- N (no) allows the Purchase Order field to be left blank

### Invoice by Ship Segment

Indicate whether the customer wants to receive individual invoices or a single consolidated invoice, when multiple pick tickets for the same order are shipped at the same time. **ORDER POWER!** supports pick ticket segmentation or the process of dividing an order into separate parts during Order Release. Each segment can be picked and shipped separately from the rest of the order.

- Y (yes) prints separate invoices for each segment to be invoiced
- N (no) consolidates the information for all segments into a single invoice during **Invoice Printing**

### First Order Date

This field records the date the first order was placed by the customer. **ORDER POWER!** updates this field automatically, but you can override this field if necessary.

3. Press **Enter** to display the *Mail List Update panel 3* (figure 8).

Computer Solutions Inc. Mail List Update			
Customer Number	9473	Name	CSI's Favorite Customer
No. of Purged Orders		Purged Order \$	
No. of Purged Cr Memos		Purged Cr Memo \$	
Last Order Date	3/11/99	?Last Salesperson 1	ANDREA
Last Statement Date		?Last Salesperson 2	
?Last Tender	AR	Last Activity Date	5/07/99
?Last Media	MEDIA	Carrier Route	
Prior 12 Medias			
F99	CSI Catalog Company Fall 1999		
S98	CSI Catalog Company Spring 1998		
H97	CSI Holiday Catalog winter 1997-1998		
F1=Help F2=Unprotect F3=Exit F12=Cancel F14=Cust Notes F23=User			

*Mail List Update panel 3* (figure 8)

The fields on this panel are for historical purposes and analysis. Although these fields can be unprotected and modified, it is strongly suggested that the data remain unchanged once it has been entered correctly.

4. Press **F2=Unprotect** to make modifications to the *Mail List Update panel 3* (figure 8).

### No. of Purged Orders

This shows how many orders placed by the customer have been purged from the system using the **Purge Orders** function. It is used only for historical analysis.

### Purged Order \$

The accumulated total amount for the purged orders.

**No. of Purged Cr Memos**

Shows how many credit memos for the customer have been purged from the system using the **Purge Orders** function. It is used for historical analysis.

**Purged Cr Memo \$**

Lists the accumulated total of all purged credit memos.

**Last Order Date**

Records the date the most recent order was placed by the customer.

**ORDER POWER!** updates this field automatically during **Order Entry**.

**Last Salesperson 1/2**

These two fields record the id's of the primary and/or secondary salesperson responsible for the sale of the customer's most recent order.

**ORDER POWER!** updates the last salesperson automatically during **Order Entry**.

**Last Statement Date**

The last statement date shows the calendar date the most recent statement was printed for the customer.

**Last Tender**

Records the method of payment (**Tender**) used to pay for the most recent order placed by the customer.

**Last Activity Date**

Last activity date records the date the most recent change was made to the customer's Mail List record.

**Last Media**

Records the last **Media Code** entered on the order placed most recently by the customer. **ORDER POWER!** updates the **Last Media** automatically during **Order Entry**.

**Carrier Route**

Refers to the delivery sequence for a postal carrier.

**Prior 12 Medias**

Show the last twelve catalogs or product advertisements (media codes) sent to the customer. The **Media Code** listed in the first entry identifies the most recent mailing.

5. Press **Enter** to update the record and redisplay the *Mail List Inquiry panel (figure 4)*.

**To display a customer in the mailing list**

The *Mail List Display panel* allows you to see all of the customer's information. Information in this panel can not be changed. To change the information go to the *Mail List Update panel 1 (figure 5)*.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel (figure 3)* to work with. Then press **Enter** to display the *Mail List Inquiry panel (figure 4)*.
2. Type **5=Display**. Then, press **Enter** to display the *Mail List Display window (figure 9)*.

```

2=C
11=
15=
5
Mail List Display
Customer Number      9473      Delete
Name                 CSI's Favorite Customer      Search Last Name
Position             CUSTOMER
Company              Search Company
Address              6187 NW 167th ST STE H33

City, State          Miami d      , FL
Zip , Country        33051-4353 , US
DAYTIME             Ext  NITE TIME      Ext  Fax
Telephones           305-636-8464
E-Mail MAIL@CSIFLORIDA.COM
Mail List Demographics      Preferred Ship Via

DS SE PR NM CO TD 7 8 9 10 11 12 13 14 15 16 17 18 19 20
Added By            Type I      Original Media
Added              11/12/98  Label Request Printed Y Y/N 11/16/98
F1=Help            F3=Exit      F12=Cancel      F14=Notes
F17=AR             F18=Address Changes      F23=User

```

Mail List Display window (figure 9)

### To display Contract Pricing

With contract pricing, the selling price for one or more items is negotiated separately and specified in the contract with each customer individually. You can view and/or modify previously negotiated item selling prices with the Contract Pricing. New items and selling prices can also be added to the customer's Contract Item Pricing file.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel* (figure 3) to work with. Then press **Enter** to display the *Mail List Inquiry panel* (figure 4).
2. Type **6=Contract Pricing**. Then, press **Enter** to display the *Contract Pricing Inquiry window* (figure 10).

```

Computer Solutions Inc.
Mail List Inquiry      Show Delete : N
2=Change 5=Display 6=Contract Pricing 7=Notes 8=Open Orders 9=History 10=AR

9473      Contract Pricing Inquiry
CSI's Favorite Customer
Pstn:
2=Change 5=Display 6=Ship Via Shipping/Handling

Item      Quantity  Unit Price  Allow  Disc  Start/End
          Dates
- A-KK      1.000    1.0000     Y      N    1/01/96 12/31/96
- A-ONE     2.000    25.0000    Y      N    1/01/96  4/06/96
- A1MEB     1.000    1.0000     Y      N    1/01/90 12/12/98
- A11       1.000    1.0000     Y      N
- A13       1.000    12.0000    Y
- A3        3.000    17.2500    Y      Y
- 00001033016BL 1.000    10.0000    Y      Y
- 00002015535RD 1.000    25.0000    Y      Y

F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top F18=Bot F21=Print      Bottom

```

Contract Pricing Inquiry window (figure 10)

### To display Customer Notes

The *Customer Note Inquiry window* (figure 11) shows customer notations and comments appended to each customer record in the mailing list. **Customer Notes** can be seen on other panels and turned into **Order Notes** to be included on **Shipping Document** based on how the comment codes are defined.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel* (figure 3) to work with. Then press **Enter** to display the *Mail List Inquiry panel* (figure 4).
2. Type **7=Notes**. Then, press **Enter** to display the *Customer Note Inquiry window* (figure 11).

```

                                     Computer Solutions Inc.
                                     Mail List Inquiry
                                     Show Delete : N
2=Change 5=Display 6=Contract Pricing 7=Notes 8=Open Orders 9=History 10=AR

```

9473 Customer Note Inquiry		From: OLDEST	CSI's
Favorite Customer		To: NEWEST	
5=Display			
Comment			
Code	Notes	Date	
— B	Print Note on Aging/Ship Doc	11/07/96	
— A	D: 305-558-7000 N: 305-554-1010 F: 305-869-8844	3/17/99	

F1=Help F3=Exit F6=Crt/Chg F7=Bkwd F8=Fwd F10=Top F16=Seq  
F18=Bot F21=Print Bottom

*Customer Note Inquiry window* (figure 11)

### To display Active Orders

This panel allows you to view all open orders for the selected **Customer**. An open order refers to any unshipped customer order.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel* (figure 3) to work with. Then press **Enter** to display the *Mail List Inquiry panel* (figure 4).
2. Type **8=Open Orders**. Then, press **Enter** to display the *Order Inquiry (Active Orders) panel* (figure 12).



Computer Solutions Inc.						
Active Orders Only			Order Inquiry		Show Closed : N	
Customer Notes Exist						
1=Select 5=Header/Detail 6=Detail 7=Order Notes 8=Audit 9=Packages 10=Segments						
11=Order Confirmation -- Status -- 12=Order Listing						
Order #	Date	Last	Next	Name		Customer #
51611	31199	---	RELEAS	CSI's Favorite Customer		9473
48857	122898	RELEAS	CNFIRM	CSI's Favorite Customer		9473
48720	121798	RELEAS	CNFIRM	CSI's Favorite Customer		9473
48588	121198	RELEAS	CNFIRM	CSI's Favorite Customer		9473

Bottom

F1=Help F3=Exit F7=Bkwd F8=Fwd F10=Top F11=Fold F12=Cancel F14=Notes F18=Bot

Order Inquiry (Active Orders) panel (figure 12)

### To display Shipped Orders

This panel displays a historical listing of all shipped orders for the selected customer.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel (figure 3)* to work with. Then press **Enter** to display the *Mail List Inquiry panel (figure 4)*.
2. Type **9=History**. Then press **Enter** to display the *Order Inquiry (Shipped Orders) panel (figure 13)*.

Computer Solutions Inc.						
Shipped Orders Only			Order Inquiry		Show Closed : Y	
Customer Notes Exist						
1=Select 5=Header/Detail 6=Detail 7=Order Notes 8=Audit 9=Packages 10=Segments						
11=Order Confirmation -- Status -- 12=Order Listing						
Order #	Date	Last	Next	Name		Customer #
50951	22699	SHIPPED		CSI's Favorite Customer		9473
50140	21099	SHIPPED		CSI's Favorite Customer		9473
50138	21099	SHIPPED		CSI's Favorite Customer		9473
50137	21099	SHIPPED		CSI's Favorite Customer		9473
50113	20999	SHIPPED		CSI's Favorite Customer		9473
49829	20199	SHIPPED		CSI's Favorite Customer		9473
48995	10599	SHIPPED		CSI's Favorite Customer		9473

Bottom

F1=Help F3=Exit F7=Bkwd F8=Fwd F10=Top F11=Fold F12=Cancel F14=Notes F18=Bot

Order Inquiry (Shipped Orders) panel (figure 13)

### To display the Accounts Receivables Summary

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel (figure 3)* to work with. Then press **Enter** to display the *Mail List Inquiry panel (figure 4)*
2. Type **10=AR**. Then press **Enter** to display the *AR Inquiry SUMMARY panel (figure 14)*.

?Cust # _____	Computer Solutions Inc.	Show Pd: N			
Pstn: _____	AR Inquiry SUMMARY	Aging Date: 5/06/99			
Cust # 9473	Tax ID#: _____	Grs Balance 3379.12-			
Name CSI's Favorite Customer		Credit Limit			
Company	6187 NW 167TH ST STE H33	Terms N30 Net 30 days			
Address	City, St MIAMI, FL	Avg Pmt Days Last 90			
City, St MIAMI	, FL	Avg Pmt Days To Date			
Zip, Cnty 33015-4353	, US	Bill to			
Telephone 305-636-8464					
Last Note 3/17/99	Last Pmt 4/14/99				
6=Order Inquiry	8=Order Notes	9=EPP Display			
Order#	Date	Increases	Decreases	Balance	Days
50951 1	2/26/99	66.87	5.00-	61.87	
50140 1	2/16/99	270.00	30.00-	240.00	
50138 1	2/10/99	99.00	100.00-	1.00-	
49956 1	2/05/99		153.61-	153.61-	
49829 1	2/05/99	38.00	212.62-	174.62-	
49766 1	2/05/99		100.00-	100.00-	
48857 1	1/04/99		1273.76-	1273.76-	
48720 1	12/24/98		394.00-	394.00-	
					More...
F1=Help	F3=Exit	F4=?List	F11=Net Bal	F12=Cancel	F14=Customer Notes
F16=Customer Info	F17=EPP	F19=Sequence	F20=Aged	F23=Detail	F24=More Keys
Customer notes exist.					

AR Inquiry SUMMARY panel (figure 14)

### To display the Ship to Customers in the Mailing List

This panel displays a historical listing of all individuals to which the customer has had merchandise sent.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection* panel (figure 3) to work with. Then press **Enter** to display the *Mail List Inquiry* panel (figure 4).
2. Type **11=Ship to Customers**. Then press **Enter** to display the *Mail List Ship To Customers* window (figure 15).

Computer Solutions Inc.			
Mail List Inquiry		Show Delete : N	
2=Change 5=Display 6=Contract Pricing 7=Notes 8=Open Orders 9=History 10=AR			
9473 Mail List Ship To Customers Show Delete: N			
CSI's Favorite Customer			
Pstn: _____			
2=Change 5=Display 6=Change Customer Info			
Ship To			
Customer#	Customer Name	City	St Del
— 257	Ms Harriet Smithson	Bakersfield	CA
— 1347	Church Enterprises	saxonburg	PA
— 2568	Olga Arnold	MIAMI	FL
— 2782	Jolly Rogers	Ft Lauderdale	FL
— 2832	Sandra Vaughn	Miami	FL
— 5470	AL AL INC.	NEW YORK	NY
— 50328	CSI	miami	FL
F1=Help	F3=Exit	F6=Create	F7=Bkwd
F12=Cancel	F18=Bottom	F21=Print List	F8=Fwd
			F10=Top

Mail List Ship To Customers window (figure 15)

### To display a Customer's Address Changes in the Mailing List

This panel displays a historical audit listing of all changes to the customer's address.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel* (figure 3) to work with. Then press **Enter** to display the *Mail List Inquiry panel* (figure 4)
2. Type **12=Address Changes**. Then, press **Enter** to display the *Address Change Inquiry window* (figure 16).

```

Computer Solutions Inc.
Mail List Inquiry
2=Change 5=Display 6=Contract Pricing 7=Notes 8=Open Orders 9=History 10=AR
11=Ship to Customers 12=Address 15=Order Interface
Name/Company
12 S CSI's Favorite customer
  O Andrew Someillan
  I Summerfield School
  I Alexandra Someillan
  I Hugh Forrest
  I Renee Vaughn
  I Mrs. Regal
  S Computer Solutions
  S SHANTEL GATLIN
  S Stanley Galper
  I PAM WELCH
  I SHANTEL T. GATLIN
  O Marshall Miller
  O DARREN D'CUNHA
  I Jane Willdo
F1=Help F3=Exit F6=Create F7=

Address Change Inquiry
9473
CSI's Favorite Customer
5=Display
User      WS Id      Date      Tme
_ ANDREA  DSP108S1  12/11/98  11:56:28
_ ANDREA  DSP108S1  1/06/99   15:01:25
From: OLDEST
To: NEWEST
Bottom
F1=Help F3=Exit F7=Bkwd F8=Fwd F10=Top
F12=Cancel F16=Seq F21=Print

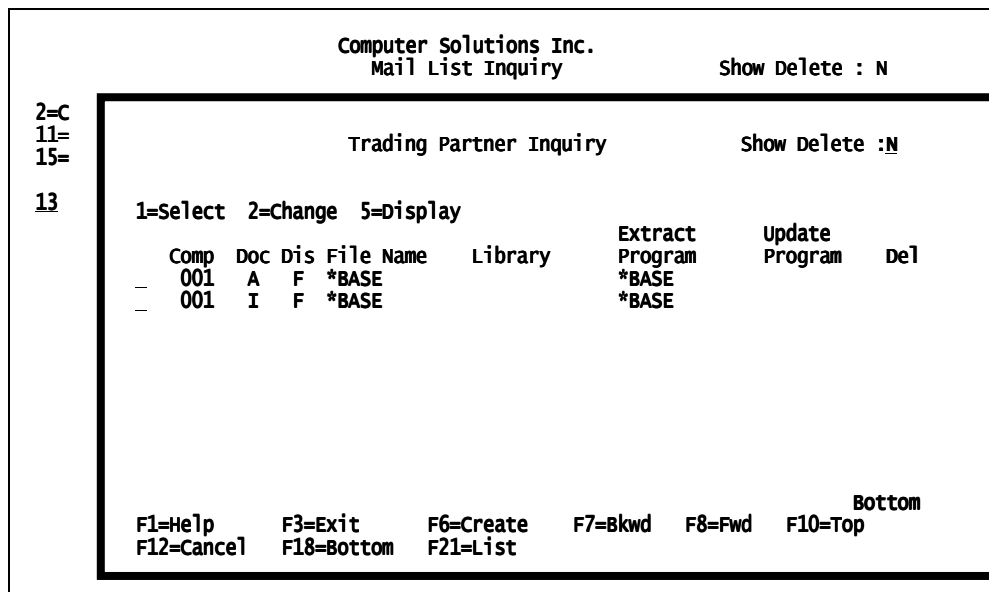
```

*Address Change Inquiry window* (figure 16)

### **To display a Customer's Trading Profile in the Mailing List**

Choose this function to display and/or modify the customer's trading partner profile. The trading partner profile enables the transmission of standard **ORDER POWER!** documents to the customer's or vendor's location electronically via a facsimile (FAX) or as an EDI (electronic data interface) file to another computer system.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel* (figure 3) to work with. Then press **Enter** to display the *Mail List Inquiry panel* (figure 4).
2. Type **13=Trading Profile**. Then press **Enter** to display the *Trading Partner Inquiry window* (figure 17).

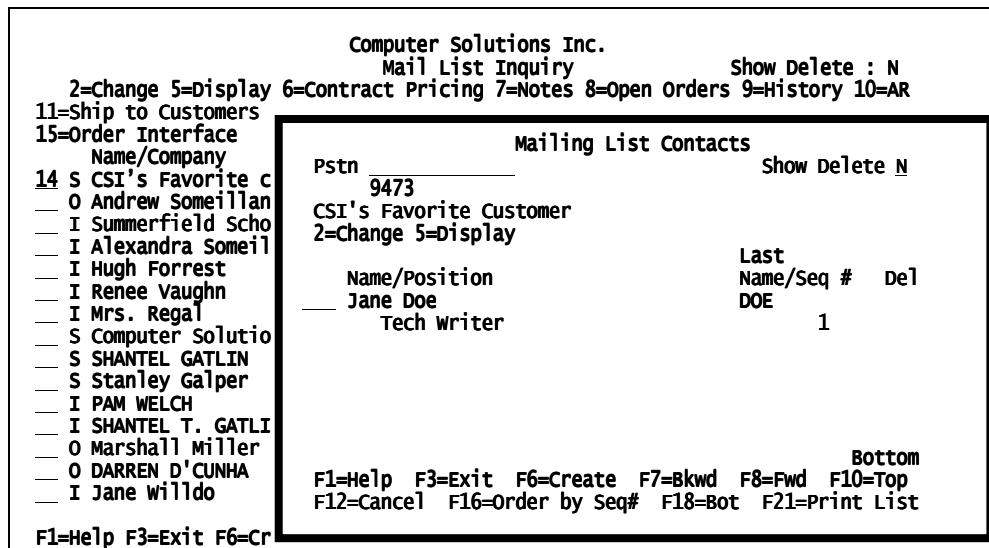


Trading Partner Inquiry window (figure 17)

**To display Mailing List Contacts**

Choose this function to display and/or modify the customer contacts. Contacts enable more than one customer to be reached at the same site. Similarly, contacts allows more than one customer to receive catalogs with the same address.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö Work with Mailing List** **Ö** Choose a customer from the *Mail List Selection panel* (figure 3) to work with. Then press **Enter** to display the *Mail List Inquiry panel* (figure 4).
2. Type **14=Contacts**. Then press **Enter** to display the *Mailing List Contacts window* (figure 18).



Mailing List Contacts window (figure 18)

### To display a Customer's Order Interface

Choose this function to display or modify the **Customer's Order Interface**. The order interface profile enables the creation of **ORDER POWER!** customer orders from a data file populated by an outside source such as another call center, web site, or the internet.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Work with Mailing List** Choose a customer from the *Mail List Selection panel (figure 3)* to work with. Then press **Enter** to display the *Mail List Inquiry panel (figure 4)*.
2. Type **15=Order Interface**. Then press **Enter** to display the *Order Interface Company Inquiry window (figure 19)*.

```

                                     Computer Solutions Inc.
                                     Mail List Inquiry
                                     Show Delete : N

2=Change=
11=Ship to
15=Order In
   Name/C
15 S CSI's
  O Andrew
  I Summer
  I Alexan
  I Hugh F
  I Renee
  I Mrs. R
  S Comput
  S SHANTE
  S Stanle
  I PAM WE
  I SHANTE
  O Marsha
  I Jane W

F1=Help F3=

Order Interface Company Inquiry
Pstn: _____ Show Delete: N
1=Select 2=Change 5=Display

Opt Comp Type Call Center Call Center Name Del

F1=Help F3=Exit F6=Create F7=Bkwd F8=Fwd F10=Top
F12=Cancel F18=Bot F21=Print
```

*Order Interface Company Inquiry window (figure 19)*

## Print Possible Duplicate Listings

The **Possible Duplicates Report** interrogates the **ORDER POWER! Customer Master File** and then produces a list of customer names that have identical or similar characteristics. This feature helps with file upkeep. After reviewing the report, you can delete any duplicated records via **Mail List Maintenance**. Refer to the *Mail List Update panel 1 (figure 5)* on page 5. If orders were placed under duplicate names the customers can be combined into one surviving customer before deleting the unwanted duplicate. Refer to “Combine Customer Activity” on page 43.

You can prioritize the characteristics to be evaluated. **ORDER POWER!** then searches and selects customer records to be printed based upon the established search hierarchy.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö**  
**Possible Duplicate Listing.**

**Computer Solutions Inc.**  
**Possible Duplicates Listing**

Customer Name.....	<u>1</u>	1-7 or Blank
Company name.....	<u>3</u>	1-7 or Blank
Address Line 1.....	<u>5</u>	1-7 or Blank
Phone Number 1.....	<u>2</u>	1-7 or Blank
Zip Code.....	<u>2</u>	1-7 or Blank
State.....	<u>—</u>	1-7 or Blank
SCF Code.....	<u>4</u>	1-7 or Blank
Mail List Exclusion.....	<u>1</u>	1=Include 2=Omit 3=Only
Use Current Printer Defaults...	<u>Y</u>	Y/N
Submit to Batch.....	<u>N</u>	Y/N
Save Changes.....	<u>N</u>	Y/N

F1=Help F3=Exit F12=Cancel

*Possible Duplicate Listing panel (figure 20)*



A value of 1 is the highest priority; 7 is the lowest priority. Any field defined with a blank, is ignored during comparison processing

2. Type a number between one and seven to indicate the relative priority of:

**Customer Name**  
**Company name**  
**Address Line 1**  
**Phone Number 1**  
**Zip Code**  
**State**  
**SCF Code**

3. Complete these fields:

**Mail List Exclusion**

Type a code to specify customer preference for receiving additional mailings.

**1=Include** selects all customers

- 2=Omit      selects only customers who want to receive additional mailings
- 3=Only      selects customers who do not want to receive additional mailings only.

**Use Current Printer Defaults**

Type a code to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 46.)

- Y (yes)    accept the existing printer defaults
- N (no)    display the *Printer Defaults panel (figure 33)* to make changes the current printer defaults

**Submit to Batch**

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

- Y (yes)    indicates that the report will be submitted as a batch job
- N (no)    indicates that the report will be run interactively

**Save Changes**

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y (yes)    save changes
- N (no)    use print defaults this time only

4. Press **Enter** to print the report on page 21.

# Possible Duplicate Report

Company Name	Name	Address Line 1	Cust#	Zip Code	Telephone 1	State
ABC	ABC	ABC	11585	33015		FL
ABC	ABC	ABC	11593	33015		FL
ABC	ANDRE L MERCIER	113 ASHLEY PLACE	10274618	98503-3537	919-637-7305	WA
ABC	ANDRE L MERCIER	113 ashley place	9217	99498		WA
ABC	ANDRE L MERCIER	113 ashley place	16832	98503-3537		WA
ABC	ANTHONY W BRAY	11812 HUNTERS COVE	3020618	06385-0001	402-292-5415	CA
ABC	ANTHONY W BRAY	11812 HUNTERS COVE	9209	33351		FL
ABC	ARMANDO	Miami	16824	06385-0001		CA
ABC	ARMANDO	armando	55483	33161		FL
ABC	BARBRA	211 ONE CORRECTIONAL INSTITUTE	17236	33015		FL
ABC	BARBRA	One Gotham Place	2758	33026	305-558-7000	FL
ABC	BILL	TO	2881	33026		FL
ABC	BILL	BILLS HOUSE	13789	33015		FL
ABC	BRADLEY GEIGER	1932 CHERRY WOOD ST	16311	33015		FL
ABC	BRADLEY GEIGER	1932 CHERRY WOOD ST	8045	92083-0000		CA
ABC	CSI's Favorite Customer	6187 nw 167th st ste h33	8060	92083-0000		CA
ABC	CSI's Favorite Customer	6187 NW 167 Street	9473	33051-4353	305-636-8464	FL
ABC	CSI's Favorite Customer	6187 NW 167th Street, H33	9748	33015		FL
ABC	DAN BOONE	5478 WOLF RD.	9758	33015		FL
ABC	DAN BOONE	5478 WOLF RD	8672	40011	502-111-2222	KY
ABC	DAN BOONE	1455 NE 121ST ST APT A302	8680	40011	502-111-2222	KY
ABC	computer solutions		51888	33161-6560		FL

User: CSIUUSER  
 Wsid: DSP101S1  
 Prog: ML01501  
 Based on: Customer Name.  
 Company Name

Computer Solutions Inc

Possible Duplicates Listing

Page: 1  
 Date: 5/27/99  
 Time: 13:15:33

More...

F3=Exit F12=Cancel F19=Left F20=Right F24=More keys



## Mailing List Count

The **Mailing List Count** report lists the total number of customer names in the mailing list by country, state, and optionally, zip code. This report can also be used for sales analysis purposes. By comparing the total customer base of a geographical region (country/state) to the sales or number of orders for specific target evaluators, the report can show sales penetration into each geographical market. To specify the target evaluators to be compared see the “Mailing List Defaults in the Company Profile” on page 48.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management**  $\circ$  **Mailing List Count**.

Computer Solutions Inc. Mail List Count Selection			
Print in Detail or Summary .	<u>2</u>	1=Detail	2=Summary
Deleted Customers .....	<u>2</u>	1=Include	2=Omit      3=Only
Use Current Printer Defaults	<u>N</u>	Y/N	
Submit to Batch .....	<u>Y</u>	Y/N	
Save Changes .....	<u>N</u>	Y/N	

F1=Help F3=Exit F12=Cancel

Mail List Count Selection panel (figure 21)

2. Complete these fields:

### Print in Detail or Summary

Type the code to determine which print form.

**1=Detail** prints a detailed report, which lists a separate total line for every zip, or postal code within each state/country.

**2=Summary** prints a report in summarized format, which accumulates zip code totals, printing a single total line per state/country.

### Deleted Customers

Type the code to print order totals.

**1=Include** includes tallies for **Deleted Customers** in the report analysis

**2=Omit** excludes order totals for all **Deleted Customers**

**3=Only** prints totals for only **Deleted Customers**

### Use Current Printer Defaults

Type a code to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 46.)

**Y** (yes) accept the existing printer defaults

**N** (no) display the *Printer Defaults panel (figure 33)* to make changes the current printer defaults

**Submit to Batch**

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

Y (yes) indicates that the report will be submitted as a batch job

N (no) indicates that the report will be run interactively

**Save Changes**

Type Y or N to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

Y (yes) save changes

N (no) use print defaults this time only

3. Press **Enter** to submit information and display the *Printer Defaults panel (figure 33)*.
4. Complete the *Printer Defaults panel (figure 33)* and press **Enter** to print the **Mail List Count Report** on page 24.

# Mail List Count Report

User: CSIUUSER		Computer Solutions Inc.			
Wsid: DSP101S1					
Prog: ML01001 Mailing List Count					
List: *SUMMARY Deleted customers: *OMIT					
		Motorcycles	Count Per 100,000	Bicycles	Count Per 100,000
Country: CA Canada					
State: NB New Brunswick	State Total NB	1	.00		.00
State: PE Prince Edwards Island	State Total PE	3	.00		.00
Country Total CA	Country Total CA	4	.00		.00
Country: CH China	Country Total CH	2	.00		.00
Country: CN					
State: AB Alberta	State Total AB		.00		.00
State: ON Ontario	State Total ON	4	.00		.00
State: PE Prince Edwards Island	State Total PE	1	.00		.00
Country Total CN	Country Total CN	5	.00		.00
Country: CO Colombia	Country Total CO	11	.43		66,666.67
Country: EN England	Country Total EN	5	.32		.00
Country: MX Mexico	Country Total MX	4	.14		33,333.33
Country: PN Republic of Panama	Country Total PN	2	.10		.00
Country: US U. S. A.					
State: AL Alabama	State Total AL	6	.36		2.50
State: AR Arkansas	State Total AR	8	.84		.00
State: AZ Arizona	State Total AZ	3	.00		.00
State: CA California					
F3=Exit F12=Cancel F19=Left F20=Right F24=More keys					

## Mail List Label Selection panels

**Mail List Label Selection** allows you to print mailing labels for specific customers based on customer characteristics, including classifications, demographics, geographic locations, order attributes (such as date, amount, items, and product groups), and media characteristics.

This option creates a work file (WMLLBL) containing names and addresses of customers matching the selection criteria. New label selections will be added to the existing **Mailing Labels** work file unless the work file has been reinitialized prior to **Label Selection**. See “Clear Label Selection” on page 37.



1. From the **ORDER POWER! Main Menu**, select: **Mail List Management**  $\circ$  **Mail List Label Selection**.

Each workstation can generate its own labels allowing multiple operators to simultaneously create distinct lists.

Computer Solutions Inc. Mail List Label Selection			
Last Order Date: From .....			
To .....	12/12/99		
Creation Date: From .....			
To .....	12/12/99		
Amt Order Date: From .....			
To .....	12/12/99		
Amount Ordered: From .....			
To .....	100.00		
	5000.00		
Contacts .....	1	1=Include	2=Omit 3=Only
Mail Exclusion .....	1	1=Include	2=Omit 3=Only
Deleted .....	1	1=Include	2=Omit 3=Only
Name Type .....	1	1=A11	2=I 3=O 4=S
Customer Class .....	1	1=A11	2=Include 3=Exclude
Customer Type .....	1	1=A11	2=Include 3=Exclude
Customer Region .....	1	1=A11	2=Include 3=Exclude
SIC Code .....	1	1=A11	2=Include 3=Exclude
Label Request .....	1	1=A11	2=Include 3=Exclude
Tender .....	1	1=A11	2=Include 3=Exclude
F1=Help F3=Exit F12=Cancel			

Mail List Label Selection panel 1 (figure 22)



Entering the same date in both the **To** and **From** fields selects based on a single day. Leaving the **From** field blank selects all dates to present.

2. Complete these fields:

### Last Order Date From/To

Type a range of dates to print labels for any customer who has placed his/her most recent order within specified range.

### Creation Date From/To

Type the dates when the customers' records were added to the **Mail List**. These two fields define a range of calendar dates.

### Amount Ordered Date From/To

Type a range of dates to print labels for any customer who has placed an order within the specified **Amount Ordered** range.

### Amount Ordered From/To

Type a range for the total amount of all merchandise ordered by a customer within the **Amount Ordered Date** range.

### Contacts

**Contacts** refers to multiple customers at the same business, office, or

organization which share the same address. Indicate which mailing list labels should be printed.

- 1=Include** selects all customers including the main customer and all of the contacts at that same site
- 2=Omit** selects only the main customer
- 3=Only** selects all of the contacts but omits the main customer

#### Mail Exclusion

Type a code to print mailing labels based on the mail exclusion flag in the customer's records. **Mail Exclusion** refers to any customer who has requested additional mailings *not* be sent to them.

- 1=Include** selects all customers regardless of the **Mail Exclusion** classification
- 2=Omit** selects only customers who are willing to receive additional mailings
- 3=Only** selects only customers refusing additional mailings

#### Deleted

Type the code to print labels for deleted customers. However, customers whose records have been deleted *and physically purged* from the system cannot be processed. This feature is useful for targeting inactive customers.

- 1=Include** selects all customers including customers whose records have been flagged for deletion
- 2=Omit** deleted customers are excluded from the selection process
- 3=Only** only inactive (deleted) customers can be selected

#### Name Type

Type the code that indicates how or why the customer was added to the **Mailing List**. Optionally, customers can be selected and labels printed based on the **Name Type** classification in each **Mail List Customer** record.

- 1=All** selects all customers despite the customer's **Name Type** classification
- 2=I** selects only customers identified as **Inquiry Customers**, who were added when they called with a question about the product or to request a catalog
- 3=O** selects only **Ordering Customers**, who were added when they placed an order
- 4=S** selects only **Ship To Customers** who were added because another customer had merchandise sent to them



All of the selection panels will appear after *Mail List Label Selection panel 1* (figure 22) is completed.

#### Customer Class

Type a code to indicate which labels should be printed.

- 1=All** selects *all* customers
- 2=Include** displays the *Customer Class Selection* panel. Select specific class codes for which to search
- 3=Exclude** displays the *Customer Class Selection* panel. Select specific class codes to bypass

#### Customer Type

Type the free-formatted customer code for reporting and printing purposes

- 1=All** selects *all* customers

- 2=Include** displays the *Customer Type Selection* panel. Select specific **Customer Type** codes for which to search
- 3=Exclude** displays the *Customer Type Selection* panel. Select specific **Customer Type** codes to bypass

#### **Customer Region**

Type the free-formatted code used to group customers by geographical or sales territory.

- 1=All** selects *all* customers
- 2=Include** displays the *Customer Region Selection* panel. Select specific **Customer Region** codes for which to search.
- 3=Exclude** displays the *Customer Region Selection* panel. Select specific **Customer Region** codes to bypass.

#### **SIC Code**

Type the code used to categorize companies into different industrial groupings.

- 1=All** selects *all* customers
- 2=Include** displays the *SIC Code Selection* panel. Select specific customer **SIC codes** for which to search.
- 3=Exclude** displays the *SIC Code Selection* panel. Select specific customer **SIC codes** to bypass.

#### **Label Request**

Type the code used to group customers for catalog label printing purposes.

- 1=All** selects *all* **Label Request** codes.
- 2=Include** displays the *Label Request Selection* panel. Select specific customer **Label Request** codes for which to search.
- 3=Exclude** displays the *Label Request Selection* panel. Select specific customer **Label Request** codes to bypass.

#### **Tender**

Type the payment method used to pay for a customer's order.

- 1=All** selects *all* customers
- 2=Include** displays the *Tender Selection* panel. Select specific customer **Tender** code for which to search.
- 3=Exclude** displays the *Tender Selection* panel. Select specific customer **Tender** codes to bypass.

3. Press **Enter** to input the data and display the *Mail List Label Selection panel 2* (figure 23).

Computer Solutions Inc. Mail List Label Selection			
Original Media .....	1	1=All	2=Include 3=Exclude
Demographics Codes .....	1	1=All	2=Select
Country .....	1	1=All	2=Include 3=Exclude
State .....	1	1=All	2=Include 3=Exclude
Zip Code .....	1	1=All	2=Include 3=Range
Product Group .....	1	1=All	2=Include 3=Exclude
Item .....	1	1=All	2=Include 3=Exclude
SCF Code .....	1	1=All	2=Include 3=Range
Prior Mailed Media .....	1	1=All	2=Include 3=Exclude
Frequency .....	1	1=All	2=Select
Assign Media Code .....			Character value
Delete Old Data If It Exists..	Y		Y/N
Call for Label Print .....	Y		Y/N
Save Changes .....	N		Y/N

F1=Help F3=Exit F12=Cancel

Mail List Label Selection panel 2 (figure 23)

### Original Media

Type the media or source code of the catalog or advertisement that attracted the buyer or catalog requestor.

- 1=All selects *all* customers
- 2=Include displays the *Original Media Selection* panel. Select specific **Original Media** codes for which to search.
- 3=Exclude displays the *Original Media Selection* panel. Select specific **Original Media** codes to bypass.

### Demographic Codes

Type the code, which identifies customer traits to be used for subsequent analysis and segmentation. Customer gender, race, and product preference are examples of potential demographic codes.

- 1=All selects *all* customers
- 2=Select displays the *Demographic Code Selection* panel. Specify and value each **Demographic**.

### Country

Type the code used to select records print labels based on each customer's country.

- 1=All selects *all* customers
- 2=Include displays the *Country Selection* panel. Select specific country codes for which to search.
- 3=Exclude displays the *Country Selection* panel. Select specific country codes to bypass.

### State

Type the code used to select records print labels based on each customer's state.

- 1=All selects *all* customers
- 2=Include displays the *State Selection* panel. Select specific state codes for which to search.
- 3=Exclude displays the *State Selection* panel. Select specific state codes to bypass.

### **Zip Code**

Type the zip code so that records can be selected and labels printed based on each customer's country.

- 1=All** selects *all* customers
- 2=Include** displays the *Zip Code Selection* panel. Select specific zip codes for which to search.
- 3=Exclude** displays the *Zip Code Selection* panel. Select specific zip codes to bypass.

### **Product Group**

Type the code for those who have purchased a particular type of product.

- 1=All** selects *all* customers
- 2=Include** displays the *Product Group Selection* panel. Select specific **Product Group** for which to search.
- 3=Exclude** displays the *Product Group Selection* panel. Select specific **Product Group** to bypass.

### **Item**

Type the code for those who have purchased a specific product.

- 1=All** selects *all* customers
- 2=Include** displays the *Item Selection* panel. Select specific **Item** for which to search.
- 3=Exclude** displays the *Item Selection* panel. Select specific **Item** to bypass.

### **SCF Code**

Type the code for the specific postal locations designated by the SCF portion of their zip code.

- 1=All** selects *all* customers
- 2=Include** displays the *SCF Code Selection* panel. Select specific **SCF Code** for which to search.
- 3=Range** specify a range of **SCF codes** from which to select.

### **Prior Mailed Media**

Type the code based on the media previously mailed to the customer.

- 1=All** selects *all* customers
- 2=Include** displays the *Prior Mailed Media Selection* panel. Select **Specific Media** codes for which to search.
- 3=Exclude** displays the *Prior Mailed Media Selection* panel. Select **Specific Media** codes to bypass.

### **Frequency**

Type the code to identify which labels to print based on the number of orders placed within a recent period.

- 1=All** selects *all* customers
- 2=Select** displays the *Frequency Selection* panel. Specify the minimum and maximum number of orders that the customer must have placed, and the past number of days in which the order must have been placed.



### Assign Media Code

Record a new media code in the **Mail List** record of each customer meeting all the label printing selection criteria. The *assign media code* is an unedited field.

After successfully printing the mailing labels, the first position of the prior 12 medias in the customer's **Mail List** record is updated with this media code automatically although the assign media code may not exist in the **Media Code** master file. All previous media codes are shifted one position. The **Media Code** previously listed in entry twelve is lost, replaced by what was entry eleven.

### Delete Old Data If It Exists

Type **Yes** or **No** to reinitialize the work file and delete previous label selections. The Mail List Label Selection option creates a work file of labels (names and addresses) for customers matching the selection criteria. The work file contents (WMLLBL) are retained unless expressly deleted by the operator.

- Y** (yes) clears all previous label selections from the work file before new label selections are made. When the selection process is complete, the work file will only comprise labels for customers selected during the current session.
- N** (no) retains previous selections in the work file. New label selections will be appended to the existing Mailing Labels work file. If the customer is selected more than once, the first selection is retained.

### Call for Label Print

Type **Yes** or **No** to print labels immediately following label selection. Otherwise, the selections can be retained for printing later, printing directly from the separate Print Labels function.

- Y** (yes) initiates the Label Printing function immediately following the selection process. The Mail List Label Print panel is displayed to define the label format and printing requirements.
- N** (no) Ends the Label Selection process following the selection of customer labels. The work file is created, then the Mailing List Management Menu is redisplayed.

### Save Changes

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

- Y** (yes) save changes
- N** (no) use print defaults this time only

3. Press **Enter**. If the **Call for Label Print** field is set to **Y** (yes), **ORDER POWER!** displays the *Mail List Label Print panel* (figure 25). Follow the steps regarding that panel.

If the **Call for Label Print** is set to **N** (no) **ORDER POWER!** returns to the **ORDER POWER! Mailing List Management panel 1** (figure 1).

## Catalog Request Label Selection



The **Catalog Request Label Selection** generates mailing labels for customers who have requested a catalog. Catalog request customers are selected based on customer and media characteristics.

The same Mailing Labels file is used for both standard **Label Selection** and **Catalog Request Labels**.

This function creates a work file (WMLLBL) of names and addresses for customers matching the selection criteria. New label selections are appended to the existing Mailing Labels work file unless the work file is reinitialized during the current process.

After catalog request labels have been printed, **ORDER POWER!** automatically flags and updates the customer's Mail List record with the date of printing.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management**  $\circ$  **Catalog Request Label Selection** to display the *Catalog Request Label Selection panel* (figure 24).

Computer Solutions Inc. Catalog Request Label Selection			
Creation Date: From .....			
To .....	<u>12/11/98</u>		
Amount Ordered: From .....			
To .....	<u>99999999.99</u>		
Contacts .....	<u>1</u>	1=Include	2=Omit 3=Only
Deleted .....	<u>1</u>	1=Include	2=Omit 3=Only
Label Request .....	<u>1</u>	1=All	2=Include 3=Exclude
Prior Mailed Media .....	<u>1</u>	1=All	2=Include 3=Exclude
Delete Old Data If It Exists..	<u>Y</u>		Y/N
Call for Label Print .....	<u>Y</u>		Y/N
Save Changes .....	<u>N</u>		Y/N
F1=Help F3=Exit F12=Cancel			

*Catalog Request Label Selection panel (figure 24)*

2. Complete the following fields:

### Creation Date From/To

Type the dates when the customers' records were added to the **Mail List**. These two fields define a range of calendar dates.

### Amount Ordered From/To

Type a range of amounts, which refer to the total value of all merchandise ordered by a customer.



All of the selection panels will appear after *Catalog Request Label Selection panel* (figure 24) is completed.

### Contacts

Type the code to indicate whether mailing labels for **Contacts** should be printed. **Contacts** refers to multiple customers at the same business, office, or organization which share one address.

- 1=Include selects all customers including the main customer and all of the **Contacts** at that same site
- 2=Omit selects only the main customer
- 3=Only selects all of the **Contacts** but omits the main customer

### Deleted

Type the code to print labels for the **Deleted** customers selected. However, customers whose records have been deleted *and physically purged* from the system cannot be processed. This feature is useful for targeting inactive customers.

- 1=Include selects all customers including customers whose records have been flagged for deletion.
- 2=Omit deleted customers are excluded from the selection process.
- 3=Only only inactive (deleted) customers can be selected.

### Label Request

Type the code used to group customers for catalog label printing purposes.

- 1=All selects *all* **Label Request** codes
- 2=Include displays the *Label Request Selection* panel. Select specific customer **Label Request** codes for which to search
- 3=Exclude displays the *Label Request Selection* panel. Select specific customer **Label Request** codes to bypass

### Prior Mailed Media

Type the code based on the media previously mailed to the customer.

- 1=All selects *all* customers
- 2=Include displays the *Prior Mailed Media Selection* panel. Select specific media codes for which to search
- 3=Exclude displays the *Prior Mailed Media Selection* panel. Select specific media codes to bypass

### Delete Old Data If It Exists

Type **Yes** or **No** to reinitialize the work file and delete previous label selections. The Mail List Label Selection function creates a work file of labels (names and addresses) for customers matching the selection criteria. The work file contents (WMLLBL) are retained unless expressly deleted by the operator.

- Y (yes) clears all previous label selections from the work file before new label selections are made. When the selection process is complete, the work file will only comprise labels for customers selected during the current session.
- N (no) retains previous selections in the work file. New label selections will be appended to the existing Mailing Labels work file.

**Call for Label Print**

Type **Y** or **N** to print labels immediately following label selection. Otherwise, the selections can be retained for printing later, printing directly from the separate Print Labels function.

- Y** (yes) initiates the Label Printing function immediately following the selection process. The Mail List Label Print panel is displayed to define the label format and printing requirements.
- N** (no) Ends the Label Selection process following the selection of customer labels. The work file is created, then the Mailing List Management Menu is redisplayed.

**Save Changes**

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of that report. This eliminates redundant data entry.

- Y** (yes) save changes
- N** (no) use print defaults this time only

2. Press **Enter**. If the Call for Label Print field is set to **Y** (yes) to display the *Mail List Label Print panel (figure 25)*. If the Call for Label Print is set to **N** (no) to return to the **ORDER POWER! Mailing List Management panel 1 (figure 1)**.

## Print Labels



The **Print Labels** function prints, or reprints, the labels generated from the Mail List or Catalog Request Label Selection functions. Mailing labels can be reprinted as often as required. Format and spool the labels to the appropriate output device to your specifications.

The label type field on the Print Selection screen must be set to 2 (CATAREQ), otherwise, the printed/printed date fields in the customer's Mail List record will not be updated.

After catalog request labels have been printed, **ORDER POWER!** flags and updates the customer's Mail List record with the date of printing.

During label printing, a final page is printed that displays the total number of labels printed.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management**  $\circ$  **Print Labels**.

Computer Solutions Inc. Mail List Label Print		
?Media not assigned (Label Sel)	*ORIGINAL	*Original, Name
Label Information.....		
Labels Across.....	2	1=One 2=Two 3=Three 4=Four
Label width.....	1	1=3 3/16" 2=3.5"
Label Type.....	1	1=MailSel 2=Catareq
Nth Selection Fraction.....	1	1-999
Out of.....	1	1-999
Delete New Data After Printing..	Y	Y/N
Is this a Re-print.....	N	Y/N
Print Labels.....	Y	Y/N
Save to File QGPL/WMLTAP.....	N	Y/N
Clear File Before Save.....	Y	Y/N
Use Current Printer Defaults....	Y	Y/N
Submit to Batch.....	N	Y/N
Save Changes.....	N	Y/N

F1=Help F3=Exit F12=Cancel

Mail List Label Print panel (figure 25)

2. Complete these fields:

### Media not assigned (Label Sel)

Type a code to indicate whether to assign a **Media Code** for a customer. The value in this field is only utilized when the **Assign Media Code** on the *Mail List Label Selection panel 2* (figure 23) has been left blank.

\***ORIGINAL** assigns the customer's original media code to the current mailing. The original media code is the first of the **Prior 12 Media** code fields recorded during selection and can be found on the *Mail List Display window* (figure 9).

**Name** a user-supplied media identifier

### Label Information

Type any free-formatted text that you want printed on the label.

**Labels Across**

Type the number of labels (names) to print across a page. One to four labels can be printed across a page.

**Label Width**

Type the widths of each mailing label. **ORDER POWER!** can print labels either 3 3/16" or 3 1/2" wide.

**Label Type**

Label type indicates whether the labels are being generated to fulfill catalog requests or a mass mailing and determines how the selected Mail List customer records will be updated.

**1=MAILSEL** create labels for customers who were selected using "Mail List Label" selection

**2=CATAREQ** generate labels for any customer who were selected using the "Catalog Request" selection

**Nth Selection Fraction  
Out of**

For sampling, Type a number between 1 and 999. These two fields combined result in a random selection or sampling of the customer base. For example, a company might wish to target every third customer out of each group of ten customers selected. Therefore, the operator would enter a "3" at the *Nth Selection* field and a "10" at the *Out of* field.

**Delete New Data after Printing**

Type **Y** or **N** to indicate whether the names selected (and stored) in the label print work file should be removed after printing has been completed.

**Y** (yes) erase the customer information from the work file

**N** (no) retain the selections in the work file, allowing additional names to be appended to the existing file for subsequent label printing runs

**Is this a Re-print**

Type **Y** or **N** to indicate if same labels were printed previously; and the **Work File** was not deleted based on the **Delete New Data after Printing** option. . This eliminates the need to search the database files again.

**Print Labels**

Type **Y** or **N** to indicate whether the labels are to be printed.

**Save to QGPL/WMLTAP**

Type **Y** or **N** to indicate whether to save the labels to a tape file. Tape files are typically sent to outside firms for printing and mailing.

**Clear File before Save**

Type **Y** or **N** to indicate whether to clear the tape file of any old data and initialize it prior to creating the new tape file.

**Use Current Printer Defaults**

Type a code to indicate whether to change the existing printer defaults for the current report

**Y** (yes) accept the existing printer defaults

**N** (no) display the *Printer Defaults panel (figure 33)* to make changes the current printer defaults

**Submit to Batch**

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

**Y** (yes) indicates that the report will be submitted as a batch job

**N** (no) indicates that the report will be run interactively

**Save Changes**

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

**Y** (yes) save changes

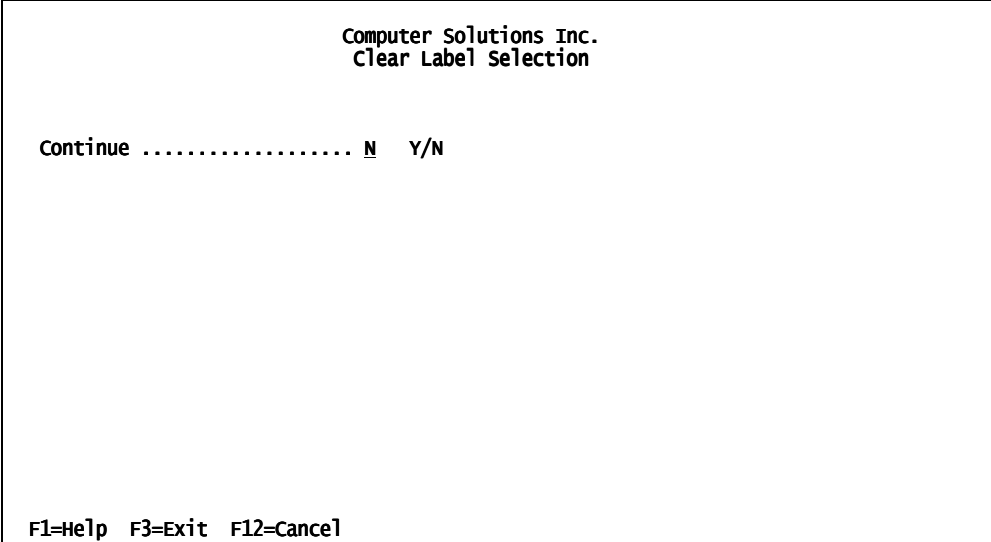
**N** (no) use print defaults this time only

3. Press **Enter** to print and return to the **ORDER POWER! Mailing List Management panel 1 (figure 1)**.

## Clear Label Selection

This option reinitializes, or clears out, the mailing label work file for the current work station. All prior customer name and address selections previously made in the *Mail List Label Selection panel 1* (figure 22) and the *Catalog Request Label Selection panel* (figure 24) are deleted.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management**  $\circ$  **Clear Label Selection** to display the *Clear Label Selection panel* (figure 26).



```
Computer Solutions Inc.
Clear Label Selection

Continue ..... N Y/N

F1=Help F3=Exit F12=Cancel
```

*Clear Label Selection panel* (figure 26)

2. Type **Y** (yes) to reinitialize the work file or **N** (no) to maintain the status quo then, press **Enter**.



## Label Selection Count

This option displays the number of customers selected for label printing. The count represents the number of labels chosen in either the *Mail List Label Selection panel 1* (figure 22) or the *Catalog Request Label Selection panel* (figure 24) by the current workstation.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management** **Ö** **Label Selection Count**.

```
MLM01                                Computer Solutions Inc.                5/11/99
JEN                                  ORDER POWER! Mailing List Management  DSP101S1

Select one of the following :

  1. Work with Mailing List
  2. Possible Duplicate Listing
  3. Mailing List Count
  4. Mail List Label Selection
  5. Catalog Request Label Selection
  6. Print Labels
  7. Clear Label Selection
  8. Label Selection Count
  9. Mailing List Count by Media
 10. Credit Memo Count by C
 11. Combine Customer Acti

Selection
==>

F1=Help F3=Exit F9=Command
Copyr
```

Label Selection Count

Name Count            1142

F1=Help F3=Exit F12=Cancel

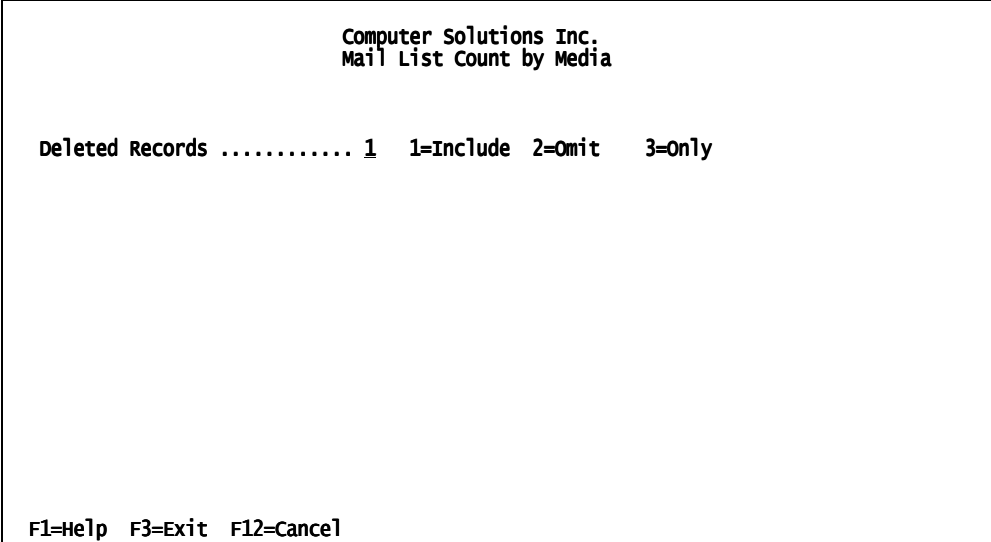
*Label Selection Count window (figure 27)*

The **Name Count** sums the total number of labels to be printed based on multiple selections.

## Mailing List Count By Media

**Mailing List Count by Media** produces a summarized report listing each media and the total number of customers that have ordered, or responded, from that media.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management**  $\circ$  **Mail List Count by Media** to display the *Mail List Count By Media panel (figure 28)*.



```
Computer Solutions Inc.
Mail List Count by Media

Deleted Records ..... 1 1=Include 2=Omit 3=Only

F1=Help F3=Exit F12=Cancel
```

*Mail List Count By Media panel (figure 28)*

2. Select one of the following choices:

### Deleted Records

Type the code to include or exclude deleted, or inactive, customers from the report. Deleted media codes are not physically deleted from the Master File. Instead they are flagged as inactive.

- |           |   |
|-----------|---|
| 1=Include | generates a report which includes inactive customers                        |
| 2=Omit    | generates a report which excludes inactive customers                        |
| 3=Only    | generates a report containing only those customers who have become inactive |

3. Press **Enter** to display the *Printer Defaults panel (figure 33)*. Then press **Enter** to print the **Mail List Count by Media Report** on page 40.

# Mail List Count by Media Report

Page: 5/27/  
Date: 5/27/  
Time: 14:04:

Computer Solutions Inc.

User: CSUSER  
Wsid: DSP101S1  
Prog: ML01005 Mailing List Count by Media  
Deleted customers: \*INCLUDE

Media	First Response	Last Response	Count
*BLANK			58
ASE01 ASE media 1	3/31/97	5/26/99	2
BARRY 1234567890	1/03/84	5/17/99	10
BLAIRSALE			1
BLAZER			1
BRV Salton Brav	4/26/99	4/26/99	45
CATALOG93 Cat 93	1/02/93	12/14/94	3
CATALOG94 catalog 1994	1/06/94	4/24/95	67
CATALOG95			13
CATALOG96 1996 Catalog	1/02/96	5/25/99	217
COUNTER Counter Sales Media	3/08/91	4/20/99	34
COUPONI The coupon in magazine 12	1/01/98	6/1/99	642
CRS crs media	3/28/97	5/12/97	60
DCW RFM DCW Catalog			2

More...

F3=Exit F12=Cancel F19=Left F20=Right F24=More keys

## Credit Memo Count by Customer

This adaptation produces a listing of the total number of credit memos created during a specific period, summarized by customer number. You can change your options and print credit memos based on customer class and/or credit memo dollar amount.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management**  $\circ$  **Credit Memo Count Selection** to display the *Catalog Request Label Selection panel* (figure 24).

Computer Solutions Inc. Credit Memo Count Selection			
From Date .....			
To Date .....	5/11/99		
Customer Class.....	2	1=All	2=Select 3=Range
Cancelled Credit Memos.....	2	1=Include	2=Omit 3=Only
Include if Count Greater Than..	0		
Use Current Printer Defaults...	Y	Y/N	
Submit To Batch.....	N	Y/N	
Save Changes .....	N	Y/N	
F1=Help F3=Exit F12=Cancel			

*Credit Memo Count Selection panel (figure 29)*

2. Complete these fields:

### From/To Date

Type a range of dates to specify which credit memos to select for the report.

### Customer Class

Type the code identifying a group or type of customer. Select credit memos created for a single **Customer Class**, for multiple **Customer Classes**, for all **Customer Classes**, or for a range of **Customer Class** types.

- 1=All** selects credit memos created for customers assigned to any **Customer Class**
- 2=Select** displays the *Customer Class Selection* panel. Select one or more specific **Customer Classes** to report on
- 3=Range** displays the *Customer Class Range* panel. Select a range of customer classes.

### Cancelled Credit Memos

Type the code to determine whether or not to include cancelled credit memos in the **Credit Memo** report.

- 1=Include** prints all **Credit Memos**
- 2=Omit** omits **Cancelled Credit Memos**
- 3=Only** prints only **Cancelled Credit Memos**

**Include if Count Greater Than**

Type the least number of credit memos accumulated by a customer to be printed. This report tallies the total number of **Credit Memos** per customer. Only customers with a total number of credit memos greater than this value, are selected. **ORDER POWER!** defaults this value to zero, effectively causing this function to select any customer with at least one credit memo applied to an order.

**Use Current Printer Defaults**

Type a code to indicate whether to change the existing printer defaults for the current report. (See the “Setting Printer Defaults” section on page 46.)

**Y** (yes) accept the existing printer defaults

**N** (no) display the *Printer Defaults panel* to make changes the current printer defaults

**Submit to Batch**

Type a code to indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

**Y** (yes) indicates that the report will be submitted as a batch job

**N** (no) indicates that the report will be run interactively

**Save Changes**

Type **Y** or **N** to indicate whether any changes made to the defaults for the current report should be applied to all subsequent printings of *that report*. This eliminates redundant data entry.

**Y** (yes) save changes

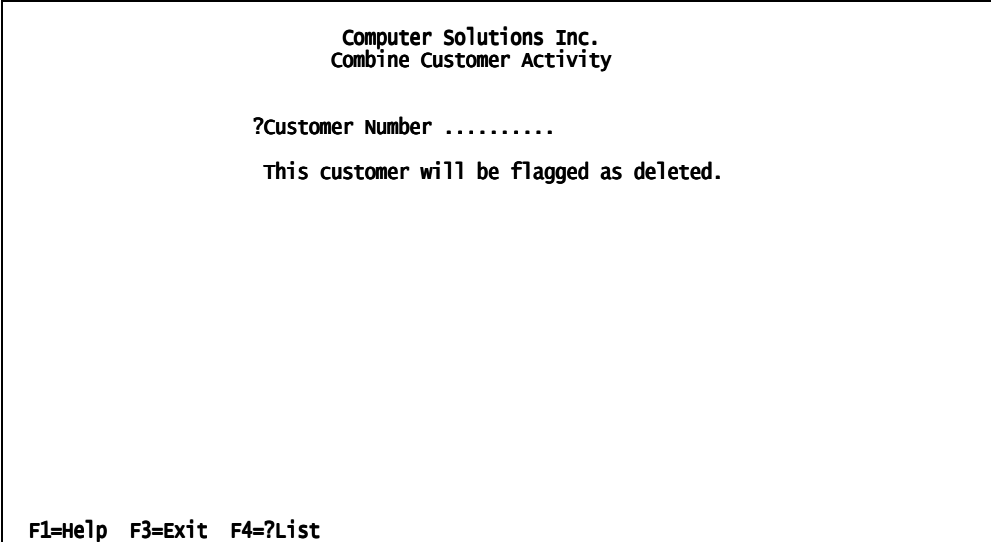
**N** (no) use print defaults this time only

3. Press **Enter** to return the **ORDER POWER! Mailing List Management panel 1** (*figure 1*).

## Combine Customer Activity

Use this function to consolidate the historical information of two different customers. All order activity, including order history and open orders, **Accounts Receivable** activity, and customer notes will be merged. **Ship To Customer** history, **Address Change** history, and **Trading Partner Profiles** are also carried over. This feature is useful for **Mail List** hygiene such as eliminating duplicate accounts.

1. From the **ORDER POWER! Main Menu**, select: **Mail List Management**  
    ö **Combine Customer Activity** to display the *Combine Customer Activity panel 1* (figure 30).



```
Computer Solutions Inc.  
Combine Customer Activity  
  
?Customer Number .....  
This customer will be flagged as deleted.  
  
F1=Help F3=Exit F4=?List
```

*Combine Customer Activity panel 1 (figure 30)*

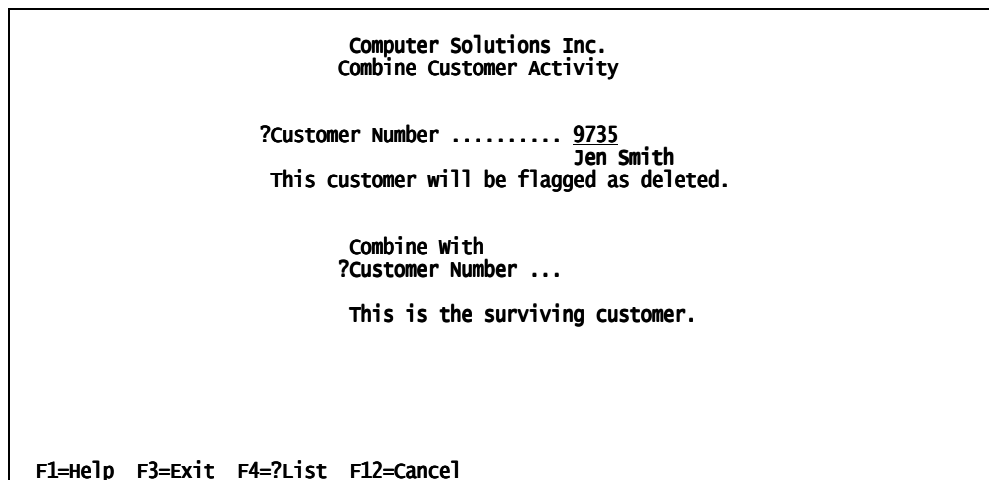
2. Complete the field:

### **Customer Number**

Type the customer number of the customer who will be deleted and unrecoverable, following the merge of all customer activity. This customer is also called the original customer in this section.

All customer information, including order history (open and closed), **Accounts Receivable** account information, **Customer Notes**, **Address Change** information, **Ship To Customer** history, and **Trading Partner Profiles** will be transferred from the *original* customer to the *surviving* customer.

3. Press **Enter** to display *Combine Customer Activity panel 2* (figure 31).



Combine Customer Activity panel 2 (figure 31)

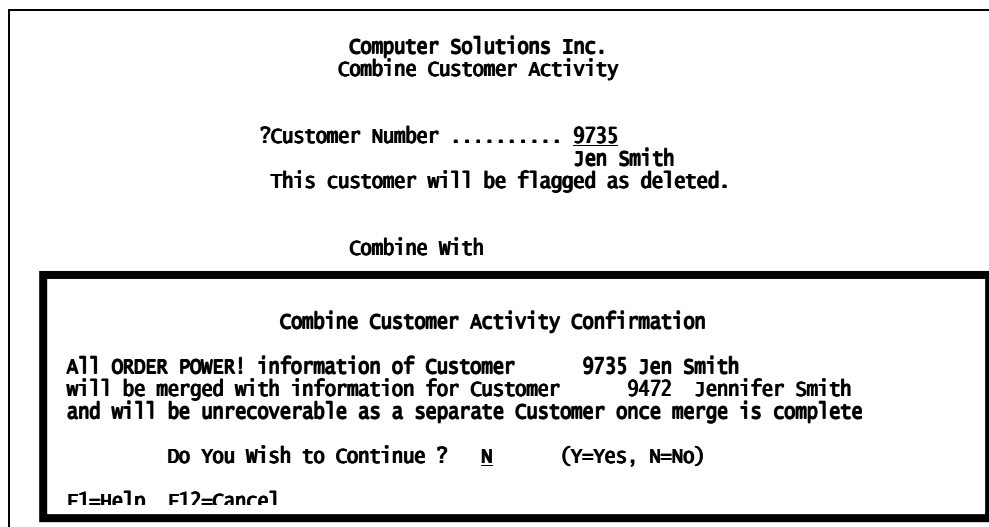
4. Complete the field:

**Combine With Customer Number**

Type the **Customer Number** of the surviving customer. Following the merge, the deleted customer's information will be consolidated with the surviving customer's existing information.

After both the original and surviving customers have been identified, **ORDER POWER!** displays a confirmation panel to verify the merge request.

5. Press **Enter** to display the *Combine Customer Activity Confirmation window* (figure 32).



Combine Customer Activity Confirmation window (figure 32)

6. Type **Y=Yes** or **N=No** to determine whether or not to complete the merge, then press **Enter**.

## Prospects

A **Prospect** is a customer who does not yet belong to your house list. Use this option for lists of customers, acquired through outside means, who can only be used for a limited amount of time. These customers will be kept in a distinct file folder and can be accessed separately. While the files are kept separate, the means of maintaining the information is the same as if they are a customer. Once a prospect orders an item from your company that prospect may be turned into a customer, eliminating the need to retype the customers information.

### **Work with Prospect File**

See the *Mail List Selection panel (figure 3)*.

### **Prospect File Label Selection**

See the *Mail List Label Selection panel 1 (figure 22)*.

### **Prospect File Catalog Request Label Selection**

See the *Catalog Request Label Selection panel (figure 24)*.

### **Print Prospect File Labels**

See the *Mail List Label Print panel (figure 25)*.

### **Clear Prospect File Label Selection**

See the *Clear Label Selection panel (figure 26)*.

### **Prospect File Label Selection Count**

See the *Label Selection Count window (figure 27)*.



## Setting Printer Defaults

The *Printer Defaults panel (figure 33)* allows you to preset the values that determine how and where a report should be printed (for example, which printer device should be used, the number of copies to be produced, the required forms type, etc). This panel is usually displayed to the user after each report request. You can change the default values at the time you run any report.

```

Printer Defaults (GN00023M)

Type choices, press Enter.

List Name . . . . . > 'AR Maintenance Proof'
Number of Copies . . . . . > 1          1-255
Submit to Batch . . . . . > *NO         *YES, *NO
Printer to Use . . . . . > *JOB         Name, *JOB, *SYSVAL
Output Queue . . . . . > *JOB         F4 - Possible Output Queues
Library . . . . . > *LIBL         Name, *LIBL
Align Forms . . . . . > *NO         *YES, *NO
Forms Type . . . . . > *STD         Character value, *STD
Hold Spool File . . . . . > *NO         *YES, *NO
Save Spool File . . . . . > *NO         *YES, *NO
Print Text at Bottom of Page . . . > *JOB
Apply Changes Permanently . . . > *NO         *YES, *NO

F3=Exit  F4=Field  F5=Refresh  F12=Cancel  F13=How to use this display
F24=More keys
Bottom
  
```

*Printer Defaults panel (figure 33)*

1. Complete these fields, or press **Enter** to accept the displayed values:

### Number of Copies

Type a number (from 1 to 255) to indicate the number of copies of the report to be produced.

### Submit to Batch

Indicate whether the report should be submitted to a job queue to process behind the scenes in batch mode and immediately free up your terminal or run the report interactively which locks the terminal until the report has completed.

- \*YES indicates that the report will be submitted as a batch job
- \*NO indicates that the report will be run interactively

### Printer to Use

Indicate which printer device the report should be printed on.

- Name** a user-supplied printer identifier
- \*JOB defaults to the user's printer
- \*SYSVAL defaults to the printer identifier in the system valve QPRTDEV

### Output Queue

Indicate the name of a spool file where the report output can be stored temporarily until it is printed.

- Name* a user-supplied output queue identifier
- \*JOB defaults to the user's output queue

**Library**

Indicate the name of the library where the output queue resides. This is an optional field.

- Name* a user-supplied library identifier
- \*LIBL** defaults to the library list

**Align Forms**

Indicate whether special forms are to be realigned before printing can begin.

- \*YES** the forms should be realigned. This will cause a message to display on your screen requesting that the forms be aligned.
- \*NO** realignment is not required prior to printing

**Forms Type**

Indicate whether the report/output should print on a special type of form.

- \*STD** regular forms are used
- Character value* a user-supplied name representing which type of form the output should be printed on. This will cause a message to display on your screen requesting that the forms be changed.

**Hold Spool File**

Indicates whether the report output should be held on a spool file until released by the user.

- \*YES** hold the output spool file
- \*NO** automatically release the output spool file

**Save Spool File**

Indicate whether the spool file should be retained the completion of printing the report.

- \*YES** save the spool file
- \*NO** release the spool file

**Print Text at Bottom of Page**

Indicate text to be printed at the bottom of each page of the report

- \*JOB** defaults to the text defined for the user

**Apply Changes Permanently**

- \*YES** any default modifications become the new default values for the current report
- \*NO** ***ORDER POWER!*** will not apply any changes made during the current report run to any subsequent reports

NOTE: Defaults can be changed any time as required.

## Mailing List Defaults in the Company Profile

The information you enter in the **Company Profile** customizes **ORDER POWER!** to meet your companies unique business requirements. The options for the **Mailing List** fall into several categories.

1. From the **ORDER POWER! Main Menu**, select: **Work with Files** **Ö** **Company Profile** **Ö** **Choose F15 (Maintenance)** **Ö** **Mailing List** to display the *Profile Update Panel 2* (figure 34).

Computer Solutions Inc.		Profile Update		Panel 2
<b>Mailing List Defaults:</b>				
Customer Class .....				
Default Credit Limit .....				
Late Fee .....	_____	'A'mt/'P'ct		
Permit Backorders .....		-	Y/N	
Print Statements .....		-	Y/N	
Retain Last Tender Info .....		-	Y/N	
Search by Tender # .....		-	Y/N	
Force Check for Zero Limit..		-	Y/N	
Describe Telephone:				
1 .....	_____	2 .....	_____	
Describe Evaluation:				
Factor 1 .....	_____	Factor 3 .....	_____	
Factor 2 .....	_____	Factor 4 .....	_____	
Mail List Info Fields:				
1 .....	_____	Mandatory	-	Y/N
2 .....	_____		-	Y/N
3 .....	_____		-	Y/N
F1=Help F3=Exit F12=Cancel				

*Profile Update Panel 2 (figure 34)*

2. Complete the following fields to be used as the defaults in the **Mailing List** upon new customer creation:

### Customer Class

Type the customer class to be defined as the default upon customer creation.

### Default Credit Limit

Type the default credit limit account balance to be assigned during new customer creation.

### Late Fee

Type the default charge applied to any outstanding or past due Accounts Receivable account balances. **ORDER POWER!** calculates and prints the late fee charge on the customer's statement but does not book, or post, the late charge to their account.

### Permit Backorders

Indicate the default setting to determine whether the customer will or will not accept back ordered merchandise.

**Y** (yes) accept partial shipments and backordered merchandise

**N** (no) do not accept backordered merchandise. If the customer chooses not to accept backordered merchandise, any merchandise not shipped after the first shipment will be automatically cancelled during **Order Release**.



A credit limit of \$0 does not mean the customer has no credit available, but rather, their credit is unlimited, unless the **Force Check for Zero Limit** is Yes.

#### **Print Statements**

Indicate whether to print an Accounts Receivable statement for a customer.

**Y** (yes) prints a statement for the customer

**N** (no) does not print a statement for the customer

#### **Retain Last Tender Info**

Indicate whether the customer's last method of payment including credit card number (if applicable) should be stored in the **Mailing List** record and with the last order.

**Y** (yes) captures the last payment method during **Order Entry**.

**ORDER POWER!** then makes it available and the defaulted to in the next order.

**N** (no) The **Mailing List** is not updated.

#### **Search by Tender #**

Indicate whether the **Tender** should be a searchable field. The **Retain Last Tender Info** field must be set to **Yes** to enable a search by the **Tender Number**.

**Y** (yes) enables **Tender Number** search capability

**N** (no) disables **Tender Number** search capability

#### **Force Check for Zero Limit**

Indicates how **ORDER POWER!** should interpret a credit limit of zero dollars. This field is not applicable if the **Default Credit Limit** is set to a dollar amount.

**Y** (yes) sets the customer credit limit to zero

**N** (no) allows the customer to have an unlimited amount of credit

#### **Describe Telephone 1/2**

Define the default titles assigned to the telephone number fields in the **Mailing List**. An separate telephone number for a FAX is already provided.

#### **Describe Evaluation 1-4**

Define four optional target markets whose total orders and sales can be analyzed by Country and State. For example, type WebUsers. Then in the Country or State Update panel type how many web users there are per area. **ORDER POWER!** reports market penetration.

#### **Mail List Info Fields**

Define the heading for three user definable mail list fields to collect miscellaneous information about each customer. Data entry into in these fields can be made optional or mandatory.

3. Press **Enter** to display the *Profile Update Panel 2.1* (figure 35)

Computer Solutions Inc.	Profile Update	Panel 2.1
<b>Mailing List:</b>		
Protect in Mail List:	Y/N	
Name .....	N	
Position .....	N	
Company .....	N	
Address Line 1 .....	N	
2 .....	N	
3 .....	N	
Convert lower case to upper Invoice by Ship Segment.....	N N	
<b>Protect Prompt:</b>		
Zip .....	N	
Phone .....	N	
Company .....	N	
Last Name .....	N	
Customer # .....	N	
F1=Help F3=Exit F12=Cancel		

Profile Update Panel 2.1 (figure 35)

4. Complete the following fields to customize the Mailing List:

**Name**  
**Position**  
**Company**  
**Address Line**

Indicate which primary fields are to be protected during **Mail List Entry** and/or **Maintenance**. To speed data entry when adding or changing mail list customer information, select fields to be protected. During data entry, protected fields are bypassed, or skipped, as the cursor moves from field to field. You may unprotect these fields as needed, during **Order Entry**.

- Y (yes) protects, or bypasses any unnecessary fields
- N (no) allows accessibility to fields

**Convert lower case to upper**

Indicate whether **ORDER POWER!** should change lower case letters to uppercase letters. This only occurs after you press **Enter** and applies only to the **Mailing List** name and address fields.

- Y (yes) capitalizes all letters
- N (no) leaves the letters as they appear

**Invoice by Ship Segment**

Indicate the default for invoice printing

- Y (yes) generates one consolidated invoice for the billing customer each time the bill to customer has multiple segments of an order picked in the same day.
- N (no) generates multiple invoices, one per **Ship Segment** (pick ticket)

**Zip**  
**Phone**  
**Company**  
**Last Name**  
**Customer #**

Indicate which fields to protect during a **Mail List Inquiry Search**. For example, if your organization customarily searches for a customer using the customer number, all other fields can be protected to position the cursor directly at the **Customer #** field.

**Y** (yes) protects the field and positions the cursor on the next field  
**N** (no) maintains field accessibility

