

15. "Canned" Special Instructions

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“Canned” Special Instructions File Overview

The Special Instructions File is used to contain predefined (“CANNED”) instructions that can be selected at ORDER ENTRY and INVOICING time. This technique is useful for several reasons:

- Often repeated instructions can be entered with only several keystrokes,
- Often repeated instructions can be entered in a uniform format, and
- A large amount of DISK space is saved because the entire text of all special instructions does not have to be entered into each Order. This has the additional benefit of improving RESPONSE TIME during Order Entry processing because a smaller Special Instructions File means translates into quicker DISK access.

“Canned” Special Instructions File Contents

Following are the contents of the “CANNED” Special Instructions File:

- **Canned Number** is the KEY FIELD for this file. It is referenced by Order Entry and Invoice processing (SPECIAL INSTRUCTIONS) to obtain the text for this entry. The number can be any number from 1 to 999 inclusive.

 **Numbers 900-999 are reserved for BOOMS use. Do not use these numbers for Instructions that you create.**

- **Flag** is set to indicate that this INSTRUCTION is, or is not, RESTRICTED. That is, whether or not it can be UPDATED/DELETED without using the special forms of Update/ Delete.
- **Text** is up to 5 lines of TEXT (74 characters each) associated with this record.

Special Instructions File Maintenance

“CANNED” Special Instructions File Maintenance is selected by Function, “SPECIAL INSTRUCTIONS”, Sub-Function “MAINTENANCE” (S1) from the Additional Functions Menu. Selecting this Option results in:

- Replacing of the Additional Functions Menu by the Special Instructions File Maintenance Screen. (Figure 15.1)
- The disappearance of the cursor

You must press a Function Key to select an Option. If you press any key other than a Function Key, the PC speaker will BEEP. The valid Functions Keys are:

- **F3** - ADD a new Special Instructions record
- **Shift-F3** - ADD-NOCLEAR a new Special Instructions record
- **F4** - DELETE a record
- **Shift-F4** - DELETE a non-deletable record
- **F5** - UPDATE a record
- **Shift-F5** - Update a non-modifiable record
- **F7** - DISPLAY a record

Add a Record (F3)

To Add a record to the Special Instructions File, select option Add (F3). This results in:

- The clearing of all input fields
- STATUS message:

Add Request

- The positioning of the cursor at the first input field (CANNED NUMBR)

Only one CANNED Special Instruction is Added at a time. However, each NUMBER can contain up to 5 lines of TEXT. In addition an instruction can be marked NON-DELETABLE, NON-MODIFIABLE by filling in field “Deletable/Modifiable” with an “N”. In reality, it is possible to modify or delete such an entry by using the special forms of “Update” or “Delete” (see be-

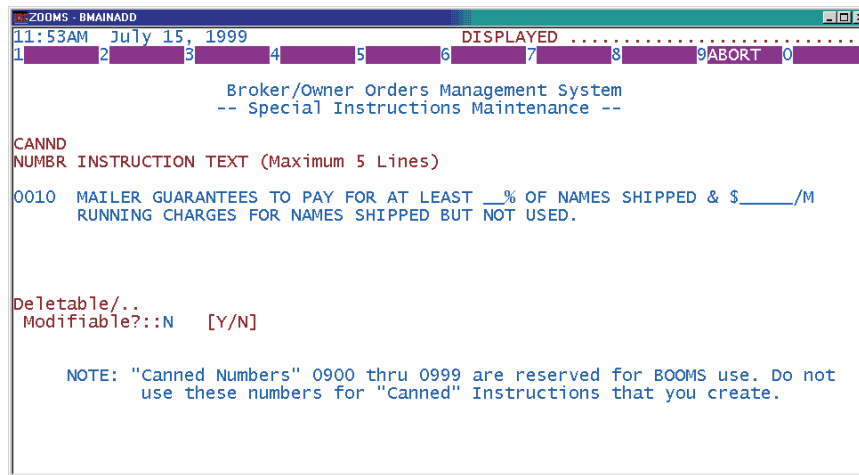


Figure 15.1. “Canned” Special Instructions Maintenance Screen.

low). Turning this flag on is a reminder that a “CANNED” instruction is probably being used by many orders in the system and that it should be handled with care.

A record will be Added to the File if:

- The CANNED NUMBER is between 1 and 9999 (inclusive) and
- At least one line of text is supplied and
- The key (“CANNED NUMBR”) being Added is not identical to a record already on the file.

Successful addition of a record to the “CANNED” Special Instructions File results in STATUS message:

Added

Add a Record Without Clearing Input Fields (Shift-F3)

On occasion, it may be desirable to Add a series of records to the Special Instructions File that contain similar information. To do this, Display (or Add) the first of the similar records. Then select option Add-Noclear (Shift-F3) to request Add without erasing any of the input fields from the screen. Fields that are different from the displayed record can be changed as desired (the “CANNED NUMBR” must be changed or you’ll get a “DUPLICATE RECORD” error message).

Display a Record (F7)

Selecting option Display (F7) results in:

- STATUS message
 - Display Request**
- The positioning of the cursor at the first, and only, input field (CANNED NUMBR)

The record will be Displayed after you fill in field “CANNED NUMBR”. If a record can be successfully retrieved from the Special Instructions File, you will receive STATUS message:

Displayed

The record is then eligible for Update (F5) or Delete (F4).

Update a Record (F5, Shift-F5)

Selecting option Update (F5) when a Special Instructions record is being displayed, results in:

- STATUS message:

Update Request

- The positioning of the cursor at the first input field ELIGIBLE for UPDATE (TEXT, line 1)

Fields are entered just as if they were being Added to the file. Single line Instructions can be converted to multi-line Instructions by simply entering additional line(s) of text. Conversely, multi-line Instructions can be modified to contain a different number of text lines (including a single line) by blanking out those lines that are not desired.

 **If the Special Instruction was marked “NON-MODIFIABLE”, then Shift-F5 must be used to update it.**

If you attempt to enter all blank text, you will receive error message:

VALUE FOR FIELD IS INVALID, RE-ENTER

and the cursor is repositioned to the first TEXT line. A successful Update results in STATUS message:

Updated

Delete a Record (F4, Shift-F4)

Selecting option Delete (F4) when a Special Instructions File record is being displayed, results in the record being removed from the Special Instructions File, a BEEP of the PC Speaker (as a warning that you have DELETED a record), and the STATUS message:

Deleted

 **If the Special Instruction is marked “NON-DELETABLE”, then Shift-F4 must be used to delete it.**

Reserved “Canned” Special Instructions

BOOMS takes advantage of the nature of “canned” special instructions to “imbed” the meaning of several of them into the system. Following are affected instructions and how they are used by BOOMS.

- **10** - is the Order Entry “Netname” special instruction. It automatically has the netname % and running charges filled in when it is selected.
- **45** - is a “Tape” media special instruction. It automatically has the mailer key filled in when it is selected.
- **50** - is a “Label” media special instruction. It automatically has the mailer key filled in when it is selected.
- **200** - is the Invoice “Netname” special instruction. It automatically has the netname percent filled in when it is selected.
- **205** - is the Invoice “Send second copy of Invoice with Payment” special instruction.
- **900** - is the Invoicing “Guarantee of Payment” special instruction.
- **909** - is the Brokerage Order “Guarantee of Payment” special instruction.
- **910** - is the Management Order “Guarantee of Payment” special instruction.
- **911** - If selected, the Exchange and Rental quantities are filled in automatically.
- **920** - is included on revised Invoices if “Clear” (F4) is selected when processing the Invoice Special Instructions.
- **930** - is included on a Job Notification if an Order has been flagged as a “Credit Risk”.
- **940** - is included on an Invoice if “Clear” (F4) is selected and Mailer Discounting is in effect but does not apply to this Order
- **941** - is included on an Invoice if “Clear” (F4) is selected and List Discounting is in effect but does not apply to this Order.
- **991** - will be used instead of #205 if there is a Payment Due and it is less than or equal to the “DON’T PAY AMOUNT” (See Chapter 24).
- **992** - will be used instead of #205 if there is a Refund Due and it is less than or equal to the “DON’T PAY AMOUNT” (See Chapter 24).

- 993 - will be used instead of #205 if there is “zero” amount due (See Chapter 24).

Keywords in “Canned” Special Instructions

Special Instructions can be defined that include “keywords” to be automatically expanded when the instruction is used on an Order or Invoice. This capability is similar to the technique that BOOMS uses to fill in “canned” instructions #10, #45 and #50. However, by using the keywords, you can place variable text on any of the 5 lines of a canned instruction AND even rewrite instructions such as #10, #45 and #50 to provide greater flexibility and to better suite your needs. The following keywords are available:

Keyword	Meaning	Length
@ORDER	Order Number	6
@KEYCODE	Mailer Key	10
@N	Net Name Percent	2
@RC	Running Charges	5
@OFFER	Mailer Offer	20
@VIA	Shipping Technique	20
@G	Guarantee-of Payment - (Number of Days)	2
@RONUM	Related Order Number	6
@SATTN	Ship-To ATTN	25
@CLIENTPO#	Client P.O. #	10

To use this capability, simply put the keyword in the text of the canned special instruction. If you use the keyword in any of the instructions used internally by BOOMS (e.g. #10), your text will be used and the fill-ins will occur where you want them.

“Canned” Special Instructions Printout (F2)

A listing of the Special Instructions File can be obtained by selecting Function “SPECIAL INSTRUCTIONS”, Sub-function “REPORT” (S2) from the Additional Functions Menu or by selecting option Print (F2) from the Special Instructions File Maintenance Screen. Selecting either of these options displays the “Print Canned Instructions” Overlay screen, which gives an option to print the entire file or to get a “segmented” (Start/End Numbers) listing. An option (default) is also provided do a “half-line” feed between numbers for better readability. Figure 15.2 is a sample partial printout.

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January 20, 1994      Broker/Owner Orders Management System      PAGE 001
12:07PM              "CANNED" Special Instructions Listing

      NBR                      T E X T

0010  Mailer guarantees to pay for at least ___% of names shipped & $ ____/M
      Running Charges for names shipped but not used.
0012  PLEASE ADDRESS NAMES ON AN "NTH" NAME BASIS.
0015  PLEASE PROVIDE A GOOD CROSS SECTION OF NAMES AS SPECIFIED ABOVE.
0040  PLEASE ADVISE TLC IMMEDIATELY IF ABOVE SHIP DATE CANNOT BE MET
0045  Please mark package and reel w/ list name, quantity & key:
0050  Please key each and every label with key: _____
0055  Please OMIT Previous Order #'s: _____
0060          * * * THIS IS A RUSH ORDER * * *
0065  DO NOT RUN OR SHIP UNTIL RELEASED BY TLC ASSOCIATES.
0200  This invoice is calculated at ___% and is payable in full based on
      computer verification of actual mail count.
0205  PLEASE SEND SECOND COPY OF INVOICE WITH PAYMENT - THANK YOU.
0225  THIS IS AN OWED EXCHANGE.
0900  BROKER GUARANTEES PAYMENT OF THIS ORDER ___ DAYS FROM INITIAL MAIL DATE
0909  ***TLC GUARANTEES PAYMENT OF THIS ORDER ___ DAYS FROM INITIAL MAIL DATE
0910  BROKER GUARANTEES PAYMENT OF THIS ORDER ___ DAYS FROM INITIAL MAIL DATE
0911  ORDER HAS BEEN APPROVED AS FOLLOWS: ...../ON EXCHANGE,...../RENTAL
0920  THIS INVOICE SUPERSEDES ALL PRIOR INVOICES FOR THIS ORDER.
0930  LIST OWNER ACCEPTS CREDIT RISK ON THIS ORDER
0993  THIS INVOICE IS FOR CONFIRMATION ONLY. NO AMOUNT IS DUE.
    
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Figure 15-2 Sample “Canned” Special Instructions Listing