

Branch Office

Branch Office Overview	18-2
Branch Office Strip Orders	18-2
Branch Office Merge Orders	18-2

Branch Office Overview

The BOOMS system is able to merge outside ("Branch Office") Orders into the main Orders File at a Central Location. In this way, Orders can be entered, processed, and printed at one location (the Branch Office) and then sent to the Central Location for Invoicing, Accounting, and detailed analysis. The only requirements are that ALL offices use the same codes for Promotion File records and List File records and each office has a unique Order Number range. The steps required to accomplish this are:

- Branch Office enters and prints Orders (and optionally Invoices them)
- At some regular interval (e.g. weekly), the Branch Office runs the "Strip Orders" procedure to place changed Orders on a Floppy Disk (or HardDisk for electronic transfer).
- The Floppy Disk is sent to the Central Location (or HardDisk files are modem'd to the central location).
- The Central Location runs the "Merge Orders" procedure to incorporate the Branch Office Orders into the Central Orders File. If an Order has already been Invoiced from the Central Location, it will not be accepted for Merge.

Branch Office Strip Orders

 **If you are transferring Order via floppy disk, place a blank, formatted floppy disk in Drive "A" (or "B") before selecting "Orders Strip".**

"Strip Orders" is selected by Function, "Branch Office", Sub-Function "Strip" ("B3") from the Additional Functions Menu. Selecting this Option will result in:

- The overlaying of the lower part of the screen with the "Orders Strip/Merge" Window (Figure 18.1).
- The positioning of the cursor at the first input field, Low Order Number.

Following are the valid screen variables:

- **Low Order Number** (for STRIP only) is the lowest Order Number to be considered for stripping.
- **High Order Number** (for STRIP only) is the highest Order number to be considered for stripping
- **DOS File Name** is the name of the file to be created by "STRIP" (to be sent to the Main Office). By default the name is "A:\BORDSTP1" (the file will be in the root directory on Drive A)
- **Report?** indicates if you want a "STRIP ACTIVITY REPORT". The default is "Y" (yes).
- **RPT for Selected Only?** indicates ("Y") that just Selected Orders should be reported. "N" produces a report for both Selected and Not-Selected Orders.

After you fill in the appropriate fields, BOOMS will begin the strip process. When the first Order is stripped, you will receive status message:

sssss of ttttt Orders Stripped

Where ssssss is the number of Orders Stripped
ttttt is the total number of Orders scanned for stripping

 **If the output of an Orders Strip already exists, you will be prompted with:**

FILE EXISTS; "F2"/Overwrite, "F4"/Cancel

Press "F2" if you want to replace the existing file. Press "F4" to abort the Strip.

As additional Orders are written to the Floppy Disk, the above status message is updated dynamically ("nnnnn" is the number of Orders Stripped). When all changed Orders have been Stripped, the message will also "flash". At this time remove the Floppy Disk and label it "BORDSTP1". It is ready to be sent to the Central Location.

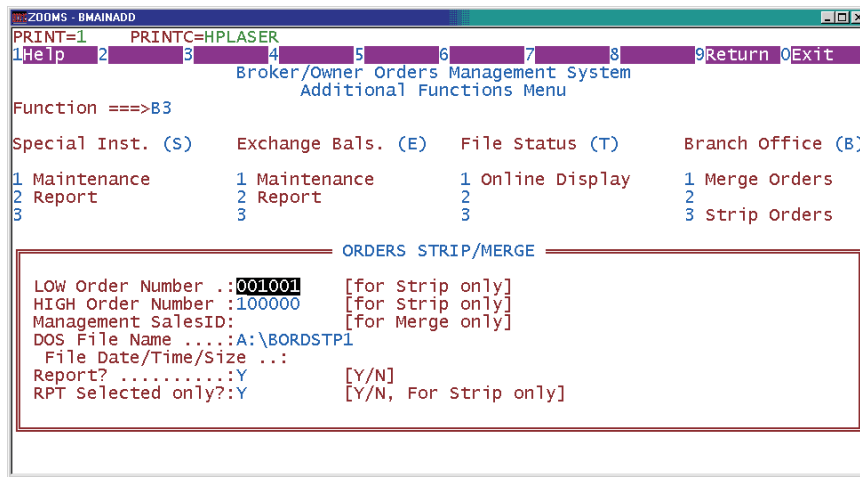


Figure 18.1. Orders Strip/Merge Window

Branch Office Merge Orders

To “Merge” Orders that are received from a Branch Office, select Function “Branch Office”, sub-function “Merge Orders” (“B1”) from the Additional Functions Menu. After placing the Branch Office “BORDSTP1” Floppy Disk in “Drive A”, selecting “B1” results in:

- The overlaying of the lower part of the screen with the “Orders Strip/Merge” Window (Figure 18.1).
- The positioning of the cursor at the first input field, DOS File Name.

Following are the valid screen variables:

- **Management SalesID** is a sales-id to be assigned to Orders for your managed lists. BOOMS will first look at the List being ordered to obtain a Management Sales-id. If a sales-id is not associated with the List, BOOMS will use this ID. If this ID is not specified, the original ID is merged. The OLD and NEW Sales-IDs are indicated on the Merge report .
- **DOS File Name** is the name of the file created by a previous strip (at the Branch Office). By default the name is “A:\BORDSTP1” (the file will be in the root directory on Drive A)
- **File Data/Time/Size** is information about the file to be merged.

Prior to actually merging orders from a branch office, the Merge Utility will display the Date, Time and Size of the “Strip” file and confirm that you want to continue with the merge:

(“Are you Sure F2/Yes, F4/No?”).

- **Report?** indicates if you want a “MERGE ACTIVITY REPORT”. The default is “Y” (yes).

After you fill in the appropriate fields, BOOMS will begin the merge process. As the Merge proceeds, you will receive STATUS message:

nnnnn Orders Merged

As Orders are read from the Floppy Disk, the above status message is updated dynamically (“nnnnn” is the number of Orders Merged). When all Orders have been Merged, the message will also “flash”. Remove the Floppy Disk

Any Order that has been Printed (or “dummy Printed”) at the Central location will not be merged from the Branch Office.

Any Order that has had shipping information posted at the Central location (either from Order-entry of Invoicing) will not be merged from the Branch Office.

Merge will reject any attempt to merge an Order that is over 1000 days old.

The merge procedure updates the "LAST USED DATE" of all Promotion File and List File records that are referenced by the merged Orders. Figure 18.2 is a sample MERGE ACTIVITY REPORT.

ORDER NUMBER		OLD SID	NEW SID	STATUS	-----EXCHANGE BALANCES-----				
					STATUS	OWNER	MAILER	OLD QTY	NEW QTY
900500		01	01	NOT REPL					
900510		01	01	NOT REPL					
900511		01	01	REPLACED					
900515		01	01	REPLACED					
900601		01	02	ADDED					
900602		01	02	ADDED					
900604		01	01	ADDED					

Figure 18-.2. Sample Branch Office Orders Merge Report