4. Orders Processing

Orders Processing Overview

Orders processing is the hub of BOOMS. Information that is added to the Orders database ("BORDERS") is the central source of information for all Orders Management, Invoicing, Accounts Receivable and Accounts Payable. Figure 4-1 is a diagram of the relationship of "ORDERS" to the other parts of the System. In general, "Orders" are entered on a "DEMAND" basis, "BATCH" printed on a scheduled basis, and reported about on a periodic basis (e.g. monthly, year-to-date). However, because the real world is never so "orderly", printing of orders and producing of reports can just as easily be done on a demand basis.

ORDER ENTRY is designed to simplify the flow of Orders through the System. You need only be concerned with entering the information required to Add the order to the Orders database. An Order can be entered in its entirety from just two fill-in-the-blanks screens. Screen 1 contains all the basic information for an Order. Screen 2 allows entry of special instructions. Even the special instructions are simplified by allowing entry of "CANNED" information that is common to many Orders. By entering a 3-digit number, a "CANNED" Instruction can be selected (See Chapter 15 for information on maintaining these instructions). This reduces the number of keystrokes required to enter the instructions and insures uniformity when entering often-repeated instructions..

BOOMS allows you to print a single Order when that Order is being displayed. However, because this "DEMAND PRINTING" is not always desirable, a "BATCH" Print facility is also included. This allows groups of Orders to be printed based on various criteria.

BOOMS provides a wide variety of "on-demand", "Month-end" and "Year-to-date" Orders Reports for both Brokerage and Management. In addition, the "Report Writer" (Chapter 27) provides access to additional reports and the ability to create customized reports.

Order Entry

Order Entry is the process by which Brokerage or Management List Rental and/or Exchange requests are introduced into the System. The Order Entry Main screen (Figure 4-2) is displayed upon selecting Function "O", Sub-Function "1" ("O1", Order Entry) from the Main Selection Menu. This screen is divided into 3 parts: Part 1 (Top 2 lines) is the STATUS/ERROR Message Area and a description of the 10 primary Function Keys (F1-F0). Part 2 is on line 3 and contains the "Order Status Flags". Part 3 is the Fill-in-the-blanks actual Order Entry area. Upon initial display, the following STATUS message is displayed as a reminder of the need to press a function key to continue:

Press a Function Key to Continue

In order to "SELECT" any of the options, an appropriate Function Key must be pressed. Selection of a valid Key results in the "ENABLING" of the option. Selection of an invalid option results in a PC Speaker BEEP and an error message in the STATUS/ERROR Message Area. An invalid option is typically an illogical Key selection. For example, pressing "F2" (Print) or "F5" (Update) when an "Order" is not being displayed, is an illogical action. This will result in Error Message:

DISPLAY A RECORD FIRST....

Also, pressing any Key except a Function Key will be ignored because Order information cannot be entered until an Update or Add request has been made. Thus, the pressing of a non-Function key will result in a BEEP of the PC speaker.

The valid Functions Keys are:

- **F2** - Print an Order
- **Shift-F2** - BATCH Print Orders
- **Ctrl-F2** - Dummy Print an Order
- **F3** - ADD a new Order
- **Shift-F3** - ADD-NOCLEAR a new Order
- **Alt-F3** - flag an Order as a Credit Risk (Toggle)
- **F4** - CANCEL an Order (Toggle)
- **Shift-F4** - Hold an Order (Toggle)
- **Ctrl-F4** - Do Promotion File Maintenance

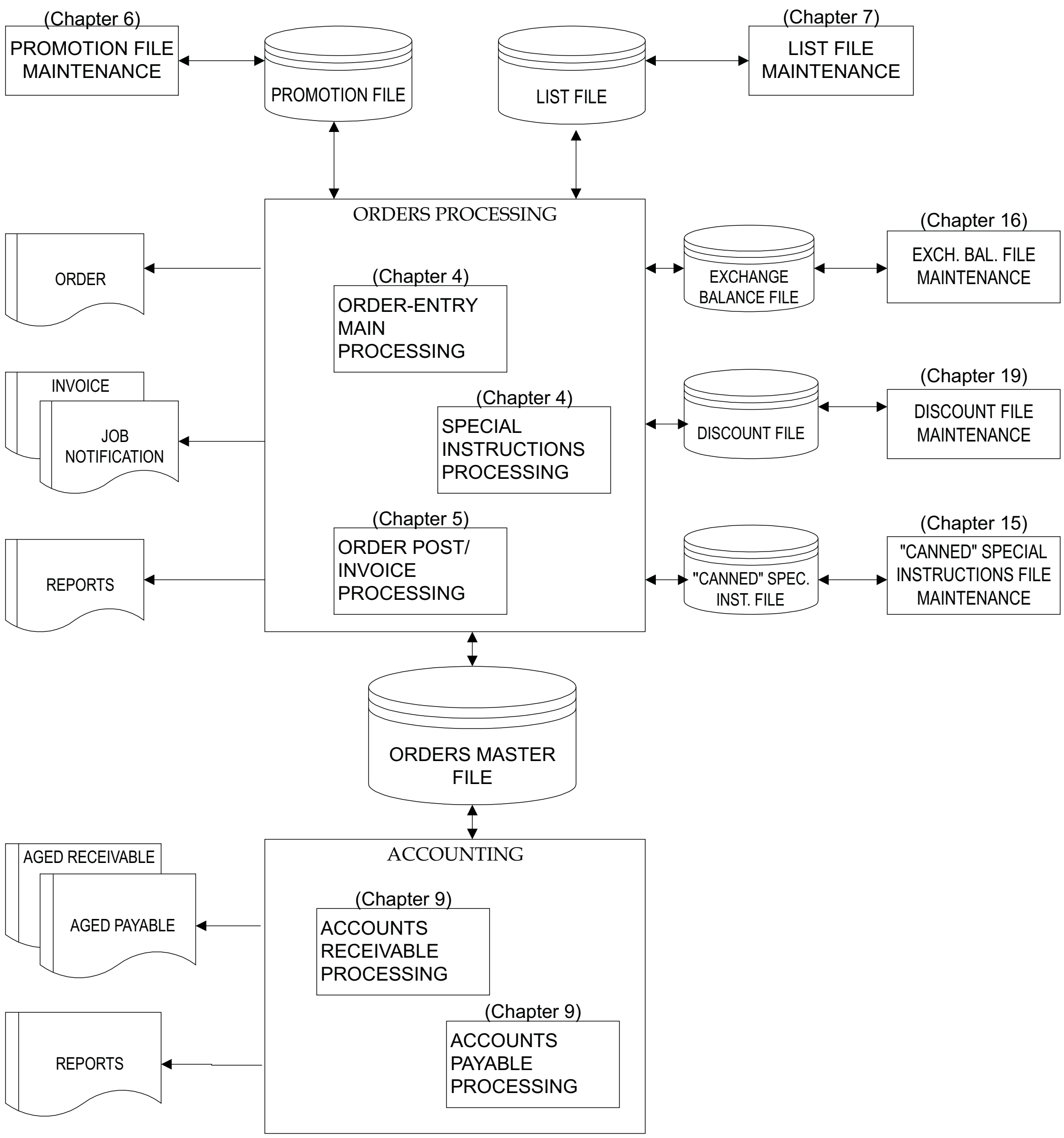

Figure 4-1. Relationship of "Orders Processing" to other BOOMS Programs

- **F5** - UPDATE an Order
- **Shift-F5** - UPDATE an Order's ORDER DATE
- **Ctrl-F5** - UPDATE an Order's REVISION DATE
- **Alt-F5** - POST Shipping Information
- **F6** - Enter Special Instructions for an Order
- **Shift-F6** - Display an Order (by Broker/Client Purchase Order Number)
- **Ctrl-F6** - Do List File Maintenance
- **Alt-F6** - Enter NOTES for an Order
- **F7** - Display an Order
- **Shift-F7** - Display next Order in sequence (same as PgDn)
- **Ctrl-F7** - Display previous Order in sequence(same as PgUp)
- **Alt-F7** - Display Last Order
- **F8** - Put an Order in REVISION Mode (Toggle)
- **Shift-F8** - Flag an Order for Guarantee of Payment (Cycle)
- **Ctrl-F8** - Do DataCard Entry/Edit
- **Alt-F8** - Set the User Flag (Toggle)

A record must be Displayed (F7) or Added (F3) before any other action can be taken against it.

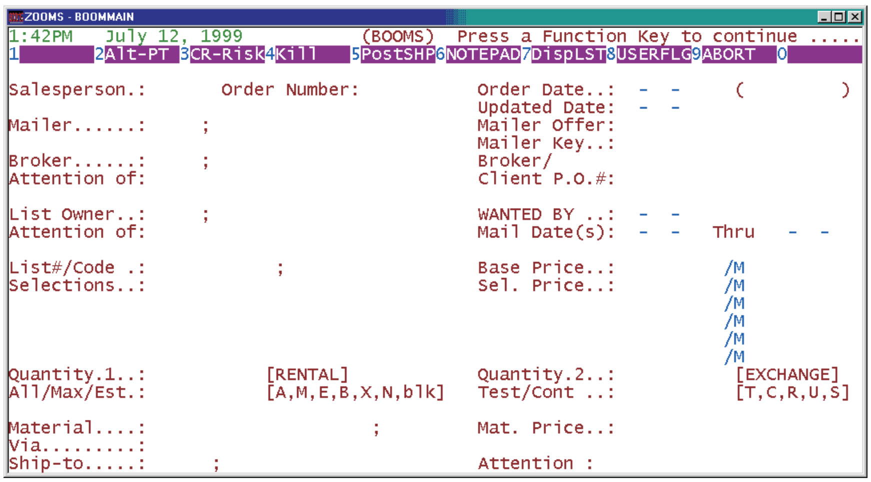

Figure 4.2. Order-Entry Main Screen

Contents of the Orders File Used by Order Entry

Following are the contents of the Orders File:

- ***Order Number*** - is a number from "000001" to "999999" that is generated automatically (i.e. BOOMS assigns the next Order Number in sequence regardless of whether the Order is for Brokerage or Management). The first Order Number is determined by a "Global Definitions" setting (see Chapter 24).
- ***Salesperson*** - 2-DIGIT number that uniquely identifies the salesperson for the order. BOOMS supports salesperson numbers from "01" through "96". These 2-digits must match the last 2 digits of a SALESPERSON ID (Type = "P" entry on the Promotion File). For an Order placed through the List Management Department, this is the List Manager's Salesperson ID. For a Brokerage Order (non-Managed List), this is the Salesperson ID of the Broker.
- ***Order Date*** - date that the Order was placed.
- ***Revision Date*** - date that the Order was last Updated.

- ***Mail Dates*** - beginning and ending Mail Dates. A date can be reset to “blanks” by entering all zeroes (i.e. 00-00-00) or “blanking” the date. A “blank” Begin Mail Date indicates the names will be used “UPON RECEIPT”. A “blank” End (through) Mail Date indicates that there is only 1 mail date.
- ***Broker Code*** - 5-character BROKER Code for the Order (This code corresponds to a Broker Code on the PROMOTION File). For a Brokerage Order, this field should be left blank (it will automatically be set to your Broker Code). If the first 3 characters of the Broker Code match the first (or only) 3 characters of your company code, then the 4th and 5th characters MUST be a salesperson number.
- ***Broker Attention Of*** - “ATTN:” for a Printed Order. If this field is left “blank” when adding an Order, the “contact” from the Promotion File is used. (meaningful for a Management Orders only).
- ***Mailer Code*** - 5-character MAILER Code for the Order (This code corresponds to a Mailer Code on the Promotion File). If you are the Mailer, the first three characters of the Mailer Code MUST match the first three characters of your company code.
- ***Mailer Key*** - 10-character Mailer Key for an Order. For a Brokerage Order, if a “Client P.O.#” is not entered, the MAILER KEY is also used as the P.O.# for accounting purposes.
- ***Mailer Offer*** - 20-character Mailer Offer for a Mailing. This field can be coded with “#nnnnn” where “nnnnn” is the List Number that corresponds to the name of the Offer. Report “EXCHPRT6” (See Supplemental List of Reports) uses this field to do an exchange breakdown of a family of lists that are being exchanged.
- ***Broker/Client P.O.#*** - 10-character Broker Order number for a Management Order or the 10-character Client P.O.# for a Brokerage Order.
- ***List Number*** - 5-digit number of the List being Ordered. (This number corresponds to a List Number on the List File). Leading zeroes need not be entered.

> ☞ **A List’s 12-character “sortcode” can be entered instead of a List Number when Adding or Updating an Order. Upon successful Add/Update, the List number (not the “sortcode”) will be displayed. If multiple lists have the same “sortcode”, the one with the lowest list number will be used. For this reason, use of “sortcode” may be more appropriate for “management” orders since it is more likely that the “sortcode’s” for management lists will be unique.**

- ***Owner Attention Of*** - “ATTN:” for a Printed Order. If this field is left “blank” when adding an Order, the “contact” information from the List Owner’s entry on the Promotion File is used. This field accepts a “List Selection Abbreviation” (See Chapter 21).

> ☞ **The Owner Code is derived from the information in the List File entry. It is not part of the Order.**

- ***Owner’s P.O. # (Confirmation Number)*** - List Owner’s Purchase Order Number (POST SHIPPING INFORMATION Window).
- ***Quantity 1 [RENTAL]*** - the number of names requested on Rental or the number of names shipped on Rental (POST SHIPPING INFORMATION Window).
- ***Quantity 2 [EXCHANGE]*** - the number of names requested on Exchange or the number of names shipped on Exchange (POST SHIPPING INFORMATION Window).
- ***All/Max/Est?*** - indicates that the Order’s requested quantity is for:

  A = ALL AVAILABLE names
  M = MAXIMUM names.
  E = ESTIMATED ALL AVAILABLE names
  B = BALANCE AVAILABLE names
  X = APPROXIMATE names
  N = Nth Name

- ***Test/Cont?***- indicates that the Order type is:

  T = TEST
  C = CONTINUATION
  R = RETEST
  U = REUSE
  S = STANDING ORDER

  For a LIST rental TEST (or RETEST) or “nth Name”, “Keep a Record of Names Used” is printed on the Order. REUSE and STANDING Orders are types of CONTINUATIONS.

- ***Base Price*** - price for Rented names. This price can be per thousand (/M) or Flat ("blank").
- ***Selections*** - 25-character descriptions of up to 5 selections.

> ☞ **The "List Selections Abbreviations" capability allows you to enter an abbreviation for a selection which will be automatically expanded to the full text of the selection. Also, if the "Base Price" and "Selections Price" are "blank" on the Order, they will be filled in automatically with the pricing associated with the List Selection. Only 1 abbreviation per selection line can be entered. Position 1 of the selection line must be a "#" (expands to full text and pricing) or "@" (expands to just full text) to indicate a selection abbreviation is being given. This is followed by the 1 to 5 character selection abbreviation (terminated by a "blank"). In addition to selections and base price, the "Owner ATTN", the "Material", "Via" and "Ship-to ATTN" fields can also be abbreviated.**

- ***Selections Prices*** - prices for the above 5 selections. These prices can be per thousand (/M) or Flat ("blank").
- ***Ship Date*** - date that names should be shipped or date they were actually shipped (POST SHIPPING INFORMATION Window). Ship Date requirements vary widely. BOOMS accommodates the following situations:

  The meaning of this field can be changed to either "***WANTED BY***" or "***NEEDED BY***" by changing a Global Definition Setting. (See Chapter 24).

  A **"blank"** Ship Date will cause "**ASAP**" to print instead of a date (unless the **Ship-to Code** is "**DONOT**" - DO NOT SHIP, TAPE IN POSSESSION).

  A Ship Date of "**00-00-00**" will cause "**WILL ADV**" to print instead of a date.
- ***Ship-to Code*** - 5-character Computer-house Code for an Order. (This code corresponds to a SHIP-TO Code on the Promotion File). If a "PIP" or "CardDeck" is being Ordered, this field defaults to the "LIST MAINTAINED AT (SB)" field on the List file entry.
- ***Ship-to Attention Of*** - "ATTN:" for a Printed Order. If this field is left "blank" when adding an Order, the "contact" information from the Promotion File is used. This field accepts a "List Selection Abbreviation" (See Chapter 21).
- ***Shipping Material*** - 20-character material to contain the names. When an Order is being ADDED, this field can be coded as follows:

9/1	=	9TRK 1600 BPI TAPE
9/6	=	9TRK 6250 BPI TAPE
4/U	=	4-UP CHESHIRE LABELS
P/S	=	P/S LABELS
3X5	=	3x5 Cards
312	=	3 ½" Diskette
3480	=	3480 Cartridge
3490	=	3490 Cartridge

- ***Shipping Material Price*** - "Per Thousand" (/M) or "Flat Charge" ("blank") for Shipping Material. This field is given special treatment as follows: if the shipping material name begins with "**M**" or "**9**" (for **Magnetic Tape**), the price is a **Flat Charge** and "**Supply Dump and Layout**" appears on the printed Order. If the name begins with "**4**" or "**P**" (**Labels**) the price is a **Per Thousand charge**. Any other 1st character results in a Flat Charge (no special handling).

> ☞ ***When an Order is "Added", if all names are on exchange, the Materal Charge will be zeroed.***

- Shipping Technique (Via) - 20-character shipping technique. When an Order is being ADDED, this field can be coded as follows (Other abbreviations may be available if you have defined them from List Selections Abbreviations: See Chapter 21):

I	=	IN-HOUSE
B	=	BEST WAY FOR ON TIME
F	=	FEDERAL EXPRESS
F1	=	FEDERAL EXPRESS P1
F3	=	FED. EX. 3RD PARTY
FS	=	FEDERAL EXPRESS STD
A	=	AIRBORNE

U = UPS GROUND
UB = UPS BLUE
UR = UPS RED (NEXT DAY)

- ***Shipping Charges*** - Shipping Charges related to "Shipping Technique" (POST SHIPPING INFORMATION Window).
- ***Names Through*** - Last date of activity reported on a List Update. This field is not printed on an Order (POST SHIPPING INFORMATION WINDOW).
- ***Received Quantity*** - This field can be reported using the Report Writer (POST SHIPPING INFORMATION WINDOW),

The following fields are entered from the "Special Instructions" screen (See "Special Instructions"):

- ***Net name Percent*** - percent to be used for special Net Name discounting. You can automate this field based on specific "Mailer/List" discounting (See Chapter 19). The Net name Percent can apply to Selections [S].
- ***Running Charge*** - per thousand fee to be charged for names shipped but not used (for net name discounting) or for charges on canceled Orders. You can automate this field based on specific "Mailer/List" discounting (See Chapter 19).
- **Ship Direct** - "Yes" indicates that an Order is not to ship directly to the Client (Useful when printing 3-part Orders)
- ***Gross Billing*** - a flag that indicates ("Y") that an Order should be billed at 100% REGARDLESS of the "net name percent". This allows an Order to be billed at gross but still have a net name percent for reporting purposes.
- ***Contact Override*** - a 2-character code used to override the "CONTACT" information that prints on a Order. By default, this code is set to the Salesperson Number. The override might be used to allow several people to do Order entry for the same Salesperson. Each of these people could have his/her own "Contact Override". For example, if you want to enter a contact override of "XX", then create an entry on the Promotion File (type = P) for "cccXX" (where "ccc" is your company code).
- ***Related Order Number*** - allows you to indicate that the current Order is somehow related to another Order in the system (typically a prior Order). For a "Package Insert" (PIP) order, this field is printed on the Invoice along with the order number. Also for "PIP" orders, this field allows you to relate subsequent Invoice-only Orders with the original Order. For example, if the original order is for 1,200,000 Inserts to be billed with 6 different invoices, the orders might be set up as follows:

```
Order# 1000 - Ordered = 1,200,000 Shipped = 200,000
Order# 2010 - Ordered = 0         Shipped = 200,000, Related Order# 1000
Order# 3500 - Ordered = 0         Shipped = 200,000, Related Order# 1000
Order# 4000 - Ordered = 0         Shipped = 200,000, Related Order# 1000
Order# 6000 - Ordered = 0         Shipped = 200,000, Related Order# 1000
Order# 6900 - Ordered = 0         Shipped = 200,000, Related Order# 1000
```

- ***Special Instructions*** - instructions tailored to the needs of an individual Order. You can enter up to 60 lines of Special Instructions text. The first 15 lines print on page 1 of the order. Lines 16-60, if entered, will print on page 2 See "Special Instructions" for more detail).

Add an Order (F3, Shift-F3)

To Add an entirely new Order, select option "Add" (F3). This results in:

- The clearing of any Order Information that was being displayed from any prior order.
- Status message:

Add Request ....

- The positioning of the CURSOR at the first input field ("Salesperson")

In some cases it is not desirable to CLEAR information from a currently displayed screen. This can occur when 2 (or more) Orders are similar (e.g. a series of Orders for the same Mailer). Not clearing the information for the displayed Order would then result in much less retyping for the new Order. BOOMS provides this facility with the **ADD-NOCLEAR ("Shift-F3")** Option. If this option is selected, none of the information for the order that was being displayed is lost (except "Order Number"and "Order Date") . This includes "Special Instructions" (except for "Net name Percent" and "Running Charges" on Tests and on continuations less than 60 days old). The Status Message and the CURSOR placement are the same as if you simply selected option Add.

When entering information for an Order, the Order Number field is skipped. This is because the Order Number is an OUTPUT-ONLY FIELD. The Order Number is calculated automatically. It cannot be entered by you.

From this point on, “Order Entry” is a simple Fill-in-the-blanks process. The minimum amount of information required to add an Order is the SALESPERSON ID. If only this information is entered, adding the Order will result in that Order Number being reserved for that SALESPERSON. Additional information is added in one of 2 ways:

- The items can be filled in 1 at a time from left-to-right and from top-to-bottom on the screen. This is done by pressing “Enter”(or “Tab”) after typing the information for a field.
- By making use of the CURSOR UP, CURSOR DOWN, TAB, and BACKTAB Keys, data can be entered in any order desired. (See APPENDIX B for a discussion of Keyboard Usage).

An Order will be added to BOOMS if:

- Either “Enter” is pressed when the cursor is in the last input field on the screen (“Ship-to Attention”) or “Esc” is pressed when the cursor is in any input field (BOOMS QUICK ACCEPT OF INPUT) and
- None of the fields have been filled in with invalid data.

When a record is successfully added, BOOMS redisplays all the output fields on the screen (with appropriate editing for numeric fields) and displays Status Message:

Added ....

Figure 4-3 is an example of a Order Entry Main screen after an Order has been Added. As noted above, when “Enter” is pressed while the CURSOR is in the last input field, it signals that Order Entry is COMPLETE. This is the way that ALL “Fill-in-the-blanks” Screens are handled. “Esc” is also used to signal completion. However, it can be pressed when the cursor is positioned at ANY input field. This is especially useful during Order Update (F5) processing when, typically, only a few fields are being updated. Using “Esc” allows you to avoid having to repeatedly press “ENTER” (to get to the last input field) to have an Update request processed. Regarding the second “bullet” above, BOOMS attempts to keep you from entering invalid data at the time you press an invalid key. For example, if a field is defined as ALPHABETIC only, the pressing of a number will result in a “BEEP” (of the PC speaker) and the number will not be accepted; or if the field requires a number (e.g. a DATE field) the pressing of a Letter key will result in a “Beep” and the letter will not be accepted. However, all fields are not so cut-and-dry. Dollar amount fields, for instance, allow the entering of numbers and a variety of editing characters (‘$’, ‘.’, etc). Error detection is not always possible as these fields are being entered. Instead, when the attempt is made to Add (or Update) the Order, extensive validity checking is done to insure that invalid information is not placed on the Orders database (or any database, for that matter). Invalid data result in message:

VALUE FOR FIELD IS INVALID, RE-ENTER

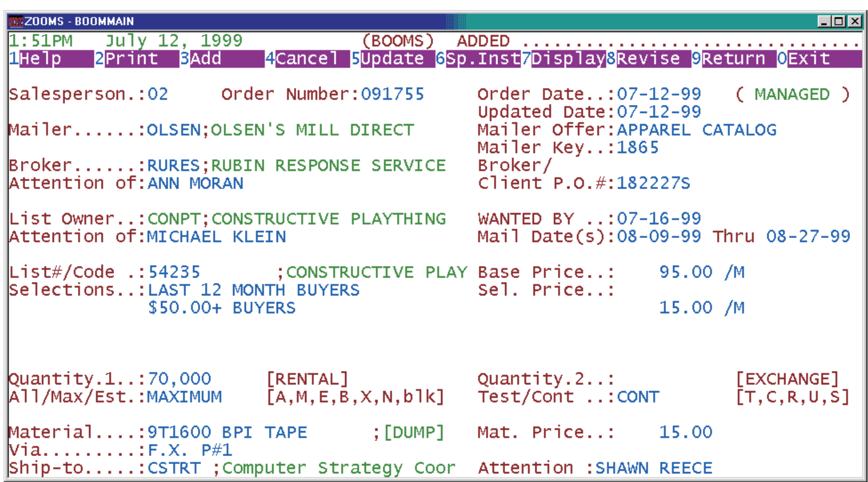

Figure 4.3. Order-Entry Main Panel (after ADD)

BOOMS prompts for valid data by placing the cursor at the field in error.

Promotion/List Lookup

If you attempt to ADD (or UPDATE) an Order that contains an unknown “Mailer Code”, “Broker Code” “Ship-to Code” or “List Number” OR if you enter a Mailer Name, Broker Name, Ship-to Name or List Name, BOOMS will display the Promotion/List Lookup screen overlay (Figure 4.3b). From this screen you can search for the appropriate code or number.

Upon initial display, the cursor is positioned at the first of 10 code/list entries. For a promotional entry, the right side of the screen also contain address information for the top entry. The Valid function keys are:

- **F2** - Use the Top Entry and return to Order Entry
- **F4/F9** - Cancel selection and return (the entry will still show as INVALID)
- **Shift-F7 (PgDn)** - Scrolls the list of codes/names UP 1 line)
- **Ctrl-F7 (PgUp)** - Scrolls the list of codes/names DOWN 1 line

You can also ENTER a name to do a RE-SEARCH. Simply type in a new name and press “enter”. The list will be refreshed with the top element containing the name you selected (as close as possible)

☞ **Promotional entries that are flagged “NOT VALID FOR ORDER-ENTRY” are not displayed**

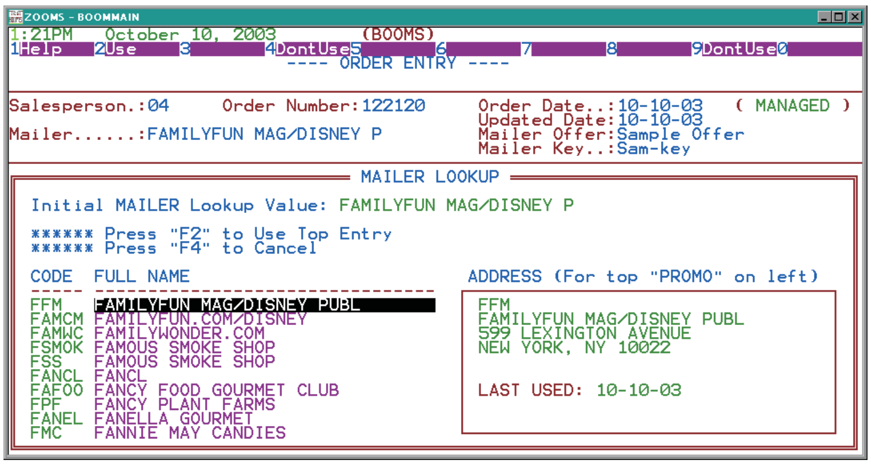

Figure 4.3b. Promotion/List Lookup Screen Overlay

Display an Order (F7, Shift-F7, Ctrl-F7, Alt-F7, Shift-F6)

Selecting option Display (F7) results in:

- STATUS message:

  Display Request ....

- The positioning of the cursor at the ORDER NUMBER field.

To DISPLAY an Order, fill in the ORDER NUMBER field and press “Enter” (or “Esc”). If the requested Order does not exist you will receive ERROR message:

RECORD(S) NOT FOUND ON FILE “BORDERS”

Normally, the record will be found. Order Entry will then respond with the STATUS message:

Displayed ....

All the fields on the screen will be filled in with information from the selected Order. In addition to the information obtained from the Order, Order Entry also searches the Promotion File and List File to obtain Company name and List name information. This descriptive information is not kept in the Order itself because it would unnecessarily take up valuable Disk Storage.

Instead, it is obtained as needed. If Order Entry processing is unable to locate an entry on either of these two files, the description for the Code will be displayed as:

****UNKNOWN****
or
***UNKN**

In this case one of two situations is possible:

- The Code was entered in error, or
- A valid code was entered, but an entry for this code does not exist on either the List File or Promotion File.

The first condition is corrected by changing the code with an Update (F5). The second condition is corrected by Adding the appropriate entry(s) to the List and/or Promotion Files. This "Add" can be done directly from Order entry processing (See "Promotion File Maintenance" and " List File Maintenance" in this Chapter).

Once an Order has been Displayed, the next Order number can be displayed by pressing **Shift-F7** or PgDn (**Display Next**). Also, the prior Order number can be displayed by pressing **Ctrl-F7** or PgUp (**Display Previous)**.

Alt-F7 (Display Last) is a special form of display. When you first sign on to BOOMS, Alt-F7 will display the highest Order number in the system. After that, it will give the last currently displayed Order or Invoice. So, for example, you could display an Order, go to Invoicing, and display the related Invoice by pressing Alt-F7 (or visa versa)

Shift-F6 (Alternate Display) will give you two additional choices as indicated by the following: status message:

F5=Mailer/MailDate F6=ClientP.O.#

F5 - allows you to display Orders in Mailer/MailDate sequence
F6 - allows you to display orders in Client PO# sequence
F4 - as always, is the Cancel key

For Mailer/MailDate, the following combinations are available:

Enter "**Mailer Code**" and press "**Esc**" to get the last Order for the Last Mail Date
Enter "**Mailer Code**" and press "**Enter**", enter "**blank Mail Date**" to get the first Order for the first Mail Date
Enter "**Mailer Code**" and press "**Enter**", enter "**Mail Date**" to get the last Order for the indicated Mail Date

For ClientPO#, enter the desired "**ClientPO#**"

Once an Order is displayed, "PgUp" and "PgDn" can be used to scroll through other Orders in sequence

☞ **If a SalesID authorization list in effect for your SignonID, an Authorization error will occur if you attempt to display an Order containing a SalesID for which you are not authorized.**

Update an Order (F5)

Update (F5) processing is very similar to Add processing. Selecting Option F5 results in:

- STATUS message:

  Update Request ....

- The positioning of the cursor at the first input field ("SALESPERSON").

From this point on, fields can be filled in exactly as they are during Add processing.

Update Order Date (Shift-F5)

A special form of the Update Option is available to allow JUST the update of the "Order Date" field. Selecting this option results in:

- STATUS message:

  UPDATE FOR "Order " DATE

- The positioning of the cursor at the "Order Date" field

ONLY the "Order Date" can be changed. Pressing "Enter" (or "Esc") will cause the update to occur. If the Order Date is left "blank", it will be set to the current date.

> ☞ **Change order dates with caution. It is not generally a good idea to do so since Orders are accessed in Order number sequence. If you must change a date, it is best to keep it in the same month as the Orders around it. If the Global Parameter, "Allow Order Date Change", is set to "N" then "Shift-F5" will be ignored.**

Update Revision Date (Ctrl-F5)

See "Revision Mode Toggle" for a discussion of "Revision" as it applies to BOOMS.

In some situations, it may be necessary to Update an Order's "Revision Date". Note that Revision Date is not a field that appears on the screen because it normally defaults to the date at the time the Order was last "Updated". However, selection of option "Ctrl-F5" allows this date to be manually overridden. This should only be done just prior to printing an order. Any further update activity will result in the revision date being set to the current date. Selecting this Option results in:

- STATUS message:

  UPDATE FOR "Revision" DATE

- The positioning of the cursor at the "Update Date" field

This action only affects the current order. Any additional updates for this or any other Order results in the current date being used for the Revision Date. Press "Enter" (or "Esc") will cause the update to occur. If the Order Date is left "blank", the Revision Date will be set to the current date.

Successful Update

A successful Update of the Order results in:

- Redisplay of the screen (with appropriate editing of numeric fields and expansion of coded fields)
- STATUS message:

  UPDATED ....

A successful Update does not mean that BOOMS has all the information needed to Print a valid Order. It only means that all the information entered was syntactically correct (and within valid ranges). For example, Promotion and/or List file information may be incorrect or Special instructions may have to be provided.

If the System is unable to Update the Order, the reason for the failure will be displayed in the STATUS/ERROR Message area. Typical reasons why an Update will not occur are:

- Syntax errors (e.g. invalid Dollar Amount fields)
- Errors on the Orders database ("BORDERS"); Any such error should be reported immediately.

Order Status Flags

During the life of an Order, it can go through many changes. For example, an Order can be canceled, revised, held, invoiced, etc. BOOMS gives visual feedback concerning this status whenever an Order is displayed (and in some situations when an Order is added or updated). Following is the STATUS information that can appear on the Order STATUS line (line 3 on the screen):

- ***Held*** - Order is HELD
- ***CANCELED*** - Order is CANCELED
- *****DEAD***** - Order is "DEAD" (i.e. not eligible for Accounting).
- ***REVISION*** - Order is in "Revision Mode"
- ***Invc'ing*** - Order is under Invoicing Control; it cannot be updated from Order-entry
- ***A/R-A/P*** - Order is under Accounting Control; it cannot be updated from Order-entry

- ***NO-XBAL*** - displayed during "Update" or "Add". It indicates that no Exchange Relationship exists between the Mailer and the List Owner (this should only concern you if you are maintaining and tracking such relationships)
- ***XBAL*CRE*** - displayed during "Update" or "Add". It indicates that Exchange Balance relationships have been automatically created for the Mailer and List owner. If this happens, BOOMS will also set a Group Code 1 equal to the first valid one found from any existing relationship for Mailer/Owner Code 1.
- ***XBALERR*** - displayed during "Update" or "Add". It indicates that an error has occurred on the Exchange Balance File (report this error immediately).
- ***PARTXBAL*** - displayed during "Update" or "Add". It indicates that only part of an exchange relationship exists between the Mailer and the List Owner. This may be a normal condition depending on the mailers for which you are tracking exchange information.
- ***GUAR-nn***, **GUAR-30**, **GUAR-45**, **GUAR-60** - Order is flagged for Guarantee of Payment for the indicated number of days (or for no specific number of days if "Guar-nn" is displayed).
- ***USER*FLG*** - Order has special meaning to you. BOOMS does not specifically use this information. However, it is possible to develop Report Writer reports using this information (See Chapter 27).
- ***NOTES*** - there are "notes" on the NOTEPAD file for this Order.
- ***INOTE*** - there are Invoice "notes" on the NOTEPAD file for this Order
- ***ZCOMM*** - for a Brokerage Order, "zero commission" is indicated (either for a Rental or an Exchange)
- ***BROKER*** - this is a Brokerage Order
- ***MANAGE*** - this is a Management Order

Special Instructions (F6)

Selecting Option "Special Instructions" (F6) while an Order is being displayed results in:

- the Order Entry Main screen is replaced by the Special Instructions Screen.
- any appropriate "canned" Instructions are automatically setup.
- status message:

Update Request ....

IT IS ALWAYS ASSUMED THAT SPECIAL INSTRUCTIONS ARE BEING DISPLAYED IN ORDER TO CHANGE THEM (or initially "Add" them). For this reason, UPDATE is always selected (enabled), and there is no need to press a Function Key to do so. There are 4 screens of Special Instructions. The first of these screens ("SI Page#1") contains 15 lines of text that is to appear at the bottom of a printed Order ("Page 1 of 2" will be printed if there is a second page). The other 3 screens each consist of 15 lines of text that combine to allow for 45 lines of special instructions that are printed on the 2nd page of an Order (Page 2 of 2). The current screen is indicated on the status line ("SI Page#"). The valid function keys are:

- **F4** - Clear. All Special Instruction text is "blanked" and any appropriate "canned" instructions (e.g. #10 for a "Net name" Order) are automatically displayed. This function ONLY clears the current screen (not the other 3).
- **F8** - 1-Page. will force all Special Instruction to print on 1 page of an Order. It is your responsibility to insure that these instructions will actually fit. "F8" is a toggle that will show the visial "1-Page" if it is on.
- **Shift-F7** or PgDn - Display Next. This allows you to page forward to access the other Special Instruction screens (2 through 4) for the current Order.
- **Ctrl-F7** or PgUp - Display Previous. This allows you to page backward to access the other Special Instruction screens prior to the current screen. If you are on the first screen, pressing "Ctrl-F7" will place you in the "Net Name" field.
- **Shift-F8** - will cycle through "Void-30, Void-45, and Void-60 (shown above Net Name) to indicate that a NetName arrangement will be voided (rescinded) 30, 45 or 60 days after the mail date if payment has not been received. These flags will cause Canned Special Instruction #960 to be placed on Line 7 at Invoice time (See "CANNED Special Instructions).

The input area on this screen is divided into two parts: the TOP Part allows direct entry of a "Net name percent", "Running Charges per thousand", "Gross Billing indicator", "Contact Override" and "Related Order Number". The BOTTOM Part (where the cursor is initially positioned) is a "Mini-Editor" which allows you to enter "Canned" (predefined) instructions and other appropriate text to be printed at the bottom of the Order.

Entering Special Instructions Text

The "Mini-Editor" section of the Special Instructions Screen consists of 2 columns. Column 1 is used to select a "Canned" Special Instruction. Column 2 allows you to enter text directly into the Order. This text is typically unique to a given Order (i.e. it is not generally used by many different Orders).

In addition to text to be placed as special instructions on the Order, column 2 also allows you to enter two other types of information. The fields labeled "SBL1" and "SBL2" are used to enter 2 lines (32 characters each) that will appear below the Computer Shop address on Shipping Labels produced during "Batch Print". The field labeled "COMM" is used to communicate information between "Order Entry" and "Order Invoicing" (e.g. prepayment received, special arrangements, "see me about this", etc.). Whereas the 15 standard lines of Special Instructions will be replaced by Special Instructions for Invoicing, the comment field is not affected by invoicing and is never printed.

Any combination of "Canned" Special Instruction Numbers and User Text can be entered. "Canned" Instruction Numbers are 3-digit numbers (See Chapter 15 for a discussion on Adding, Updating and Printing these "CANNED" Special Instructions). Entering this data is similar to entering any data in BOOMS. When the cursor is positioned in column 1 ("CNUM" or "Canned instruction Number") a 3-digit Number can be entered (if the number begins with a leading "0", the leading "0" need not be entered; thus "010" may be entered as "10"). When the cursor is in column 2 (Special Instructions Text), User Text (up to 74 characters) can be entered. Text that is generated by a " Canned" number can be converted to User Text as follows:

- After displaying a line containing a "Canned" number, blank out the number
- Update the text field as desired
- Press "Esc"

The line is now considered User Text. As with other screens, the change is not reflected until you press "Enter" while in the last input field ("COMM"), or if you press "Esc" (Quick Accept). Upon doing either of these, BOOMS will redisplay the screen. This redisplayed screen will contain the expanded text of all "Canned" Instructions. In some cases, the "Canned" Instruction takes up more than 1 line on the screen. In these cases, the 2nd, and subsequent, line(s) of the instruction will be "flagged" with a "*" in column 1. You will notice that this field has become an OUTPUT-ONLY field; that is, you can no longer enter data into it. This will be the case as long as the multi-line "Canned" instruction is included.

> ☞ **If you initially enter both a "canned" number and text, the canned number will be used and the user supplied text will be ignored.**

As you enter or modify special instructions you receive Status message:

UPDATED ....

However, actual changes to the Special Instructions File do not occur until you press "F9" to return to the Order Entry Main screen (or PgUp/PgDn to another Special Instructions Screen) . If at any time you decide that you want to nullify these changes, you can "ABORT" by pressing "Ctrl-Break" (or Alt-F9). This will cause an immediate return to the Order Entry Main screen without updating the Special Instructions File.

CANNED Special Instructions

If an instruction contains a "**J**" in position 1 of the "CNUM" field, that instruction is flagged to only appear on a **Job Notification** (the 2nd part of a 3-part Management Invoice) or a Management Remittance Advice (See Alternate Print options for Brokerage Orders). If an instruction contains an "**S**" in position 1 of the "CNUM" field, that instruction is flagged to only appear on a **Management Service (exchange) Fee Invoice** (the 3rd part of a 3-part Management Invoice). If such an instruction is present, the Invoice will be printed even if there is no exchange quantity. In this way, the Service Fee Invoice can be used to indicate a "Credit Due" a List Owner (through Special Instructions). If an instruction contains a "**B**" in position 1 of the "CNUM" field, that instruction is flagged to appear on **both the Invoice and the Job Notification or Management Remittance Advice (for Brokerage Orders)**.

Several "canned" instructions have predefined meanings to BOOMS. You can get a current listing of these instructions from the "Utilities Menu" (Function "Print Special Instructions"):

> ☞ **"Canned" Special Instructions 900 to 999 are reserved for BOOMS use. They should not be used for unique instructions that you want to define.**

#10 - Net Name Percent/Running Charges Per Thousand are automatically filled in for "Order Entry".

#45 - Please Mark Package.... causes the "Mailer Key" to be automatically filled in.

#50 - Please Key each ... causes the "Mailer Key" to be automatically filled in.

#200 - Net Name Percent is automatically filled in for Invoicing when you press "F4" (Clear).

#205 - Please send 2nd copy of Invoice with statement is automatically included when you press "F4" (Clear) from Invoicing.

#900 - Invoicing Guarantee of Payment. The number of days for the guarantee is automatically filled in when you press "F4" (Clear).

#909 - Order Guarantee of Payment. For a "Brokerage" Order, the number of days for the guarantee is automatically filled in when you press "F4" (Clear).

#910 - Order Guarantee of Payment. For a "Management" Order, the number of days for the guarantee is automatically filled in when you press "F4" (Clear).

#911 - Automatic Rental and Exchange Quantity fill in.

#930 - List owner accepts Credit Risk on this Order is automatically included on a Job Notification if the Order is flagged as a "Credit Risk".

#940 - Mailer Discount does not apply is automatically placed on line 9 on an Invoice if discounting is in effect, but does not apply to this Order, when you press "F4" (Clear).

#941 - List Discount does not apply is automatically placed on line 9 on an Invoice if discounting is in effect, but does not apply to this Order, when you press "F4" (Clear).

#960 - Netname Arrangement Voided (rescinded). The number of days for the VOID (30, 45 or 60) is automatically filled in when you press "F4" (Clear). The Fill-in is at offset 60.

#991 - automatically replaces #205 when there is a "Payment Due" and it is less than the "DON'T PAY AMOUNT" (See Chapter 24)

#992 - automatically replaces #205 when there is a "Refund Due" and it is less than the "DON'T PAY AMOUNT" (See Chapter 24).

#993 - automatically replaces #205 when there is NO "Payment Due".

☞ **A default "canned" instruction can be associated with a salesperson (See Chapter 6). This instruction is automatically placed on line 11 when you initially display the "Special Instructions" screen.**

Insert & Delete Special Instructions Text Lines

Normally, changes to special instructions are made by simply overtyping the "Canned" number and/or the User Text. However, when you need to adjust the text in a more significant manner, you can INSERT and DELETE lines as follows:.

- Insert Line - position the cursor on the line BEFORE which you want to insert a line (you can be in either column 1 or 2). Press the INSERT LINE key combination (Alt-I). All lines, starting with the line containing the cursor are moved down 1 line (creating a blank line). If there was text on line 15 prior to this INSERT LINE, the text is deleted and will not be printed when the Order is printed. The cursor will be positioned on the blank line.
- Delete Line - position the cursor on the line that you want to delete (you can be in either column 1 or 2). Press the DELETE LINE key combination (Alt-D). All lines, starting with the line following the one containing the cursor are moved up 1 line.

Figure 4-4 is an example of a Special Instructions screen that has been filled in and contains "CANNED" Instructions #10 and #50.

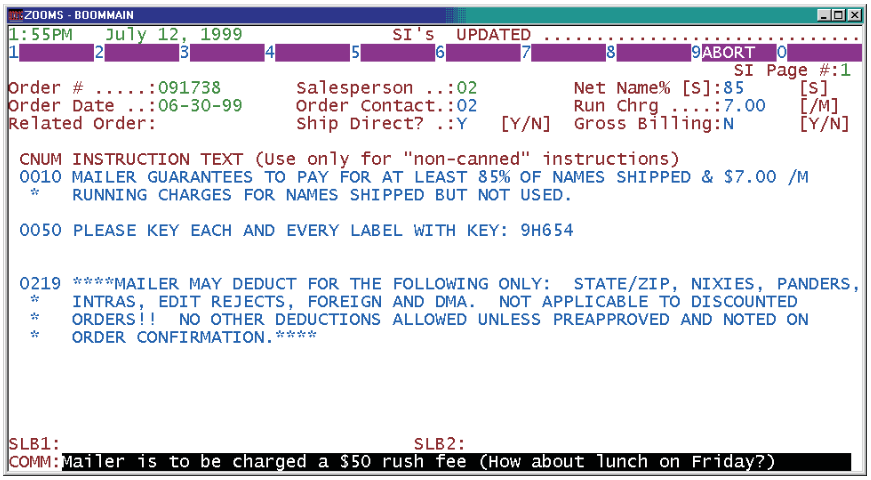

Figure 4.4. Special Instructions Screen

Order Notes (Alt-F6)

Selecting Option "Order Notes" (Alt-F6) while an Order is being displayed causes the Order Entry Main screen to be replaced by the "NOTEPAD" screen (Figure 4-5). Repeatedly pressing "Alt-F6" will alternate you between "Order notes" and "Invoice notes". Upon initial display one of the following messages appears in the STATUS/ERROR Message Area:

Update Request ....
DISPLAY-ONLY MODE ....

If you are authorized to update the notes, you will receive the first message. Otherwise, you will receive the second. Updating Notes is similar to updating Special Instructions. There are 15 lines of notes and one line for "Decoys Received". The NOTEPAD is simply running text. The information contained in it is not printed on an Order. However, it can be printed by itself by

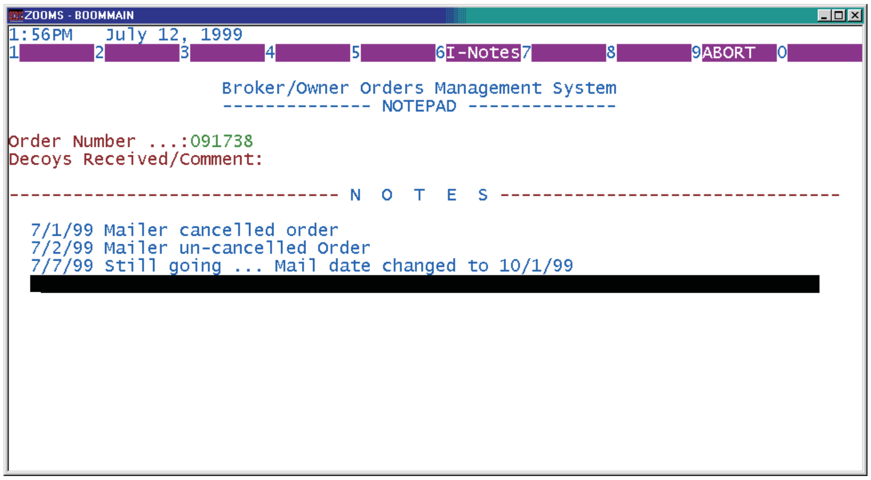

Figure 4.5. Sample "Notes" Screen

selecting option "Print" (F2). Notes can be a convenient way to log any unusual Order-related information to be reviewed at a later time.

Printing a Single Order (F2, Ctrl-F2, Alt-F2)

When an Order is being displayed, it can be printed by selecting option Print (F2). The Printer should be loaded with Order Forms and properly aligned prior to doing this. If the Printer is not ready, the screen will clear and you will receive a combination of the following DOS messages:

Write fault error writing device LPTn
Printer out of paper error writing device LPTn
Abort, Retry, Fail, Ignore

After you have taken the appropriate action to correct the error (i.e. put paper in the printer or put the printer on-line), select option "Retry" (R). Selecting any of the other options will result in a FAILED request (return to BOOMS). On some systems, it can take up to 45 seconds for a printer to "time-out", so be patient if you "FAIL" the request. Also, it is possible for your printer to be setup to never timeout. So, if it is not printing, doublecheck to make sure that it is "Ready".

Once a printout has started, you can interrupt it be pressing "Esc". Otherwise, when the Order has finished printing you will receive STATUS Message:

PRINTED ....

☞ **Once an Order has been printed, it will not be reprinted by "BATCH" print unless it is subsequently updated. Also, the Order is now eligible for INVOICE PROCESSING. If you update an Order, it will require reprinting in order to be Invoiced.**

An Order can be reprinted even if it is under Accounting control (either Invoicing or Accounts Receivable/Accounts Payable).

If the Broker Code is not valid for a "Brokerage Order" you will get error message "ORDER CONTAINS INVALID BROKER CODE!"

When attempting to print an Order to a FAXBOX or ZETAFAX, the Order WILL NOT be sent for an internal management order if the Broker is also the Salesperson. This will prevent the Broker from accidentally faxing the Order to your List Owner's Service Bureau.

A special form of Print is available to mark an Order as PRINTED WITHOUT ACTUALLY PRINTING IT. This option may be useful if you make any changes that do not require reprinting on paper. Selecting option "Dummy Print" (**Ctrl-F2**) while an Order is being displayed results in:

- The Order being Marked Printed (not actually Printed)
- STATUS message:

PRINTED ....

A special form of Print (**Alt-F2**) selects "Alternate Print". You are presented with the following prompt that allows you to select a different print format for a "multi-page" Order (i.e. there is more than 1 page of Special Instructions):

F5=PAG-1-ONLY F6=ALL-1-PAG F7=COMBO

Press a function key to perform the required action:

F2 = a normal print of the Order.
F5 = Print ONLY page 1 (SI's on pages 2-4 are ignored)
F6 = Print the entire Order on ONE PAGE (you may get a page overflow).
This is the same as specifying "1-Pag" from the Special Instructions screen.
F7 = Print the Order twice (F5 and F6 combined)
F4 = As always, cancels the request

When printing an Order, BOOMS will automatically detect:

- Whether the Order is for Management or Brokerage.
- Whether a revisable field has been updated for an order in REVISION MODE. (See "REVISION MODE"). If it has, the field is highlighted (e.g. double struck or underlined).
- Whether the Mail date is a single date or one date "THRU" another.
- Whether the Order is for a List RENTAL, List EXCHANGE, or BOTH a rental and an exchange.
- Whether the material is a magnetic tape, labels, or other media.
- Whether the material charge is a "per thousand" or flat charge.

- Whether 4-up or 5-up addresses are used
- If **"BLOCKOUT" IS NOT in effect** (see Chapter 24) then:

  For a "Management Order" (outside broker), the Broker's address is printed.
  For a "Management Order" (internal Broker), the Mailer's address is printed.
  For a "Brokerage Order", the Owner's address is printed.
- If "**BLOCKOUT**" **IS in effect** (see Chapter 24) then in all cases, the Owner's address is printed.
- If an Order is multipage (i.e. Special Instructions will print on page 2), then "PAGE 1 of 2" or "PAGE 2 of 2" is printed in the the top right corner of the Order.
- For a direct Order (from a Mailer) for an In-house list, an "ATTN" line will appear for the mailer. This information is obtained from the "Contact" field from the mailer's entry on the Promotion File.

Figure 4-6 is an example of a Printed Order.

```
TLC Associates                      LIST RENTAL INSTRUCTIONS:
   LOGO  227 TLC Lane               ORDER DATE:     11-19-94
   LOGO  P.O. Box 1122
   LOGO  Tender, NY, 10011          TLC   ORDER #:  003005
         212-666-2277

MAILER:   Hartley Stores            Mailer Offer:   Sales Catalog
(HART)                              KEY:            HC072

OWNER:    Orson's & Associates      SHIP DATE:      12-05-94
          ATTN: List Management
          123 Wills Avenue          MAIL DATE:      01-15-95 THRU
          New York, NY 10011                        01-30-95
          (212)-334-4567

LIST:     Land and Land             BASE PRICE:     $85.00/M
(12345)

SELECTS:  6 Month Buyers            PRICE           $10.00/M
QUANTITY: 20,000    ** MAXIMUM **   TEST/CONT:      TEST
                                            Keep a Record of Names Used

MATERIAL: 9T/1600 BPI MAG TAPE      PRICE:          $15.00
          Supply Dump & Layout

SHIP-TO:  CompuShop                 VIA:            FEDERAL EXPRESS #1
          ATTN: Bob Black
          1123 Evans DRIVE
          New York, NY 10013
          (212)-876-2359                   Contact: Tom Broker
                                           212-666-2277

------------------------ Special Instructions -------------------------

PLEASE ADVISE TLC IMMEDIATELY IF THERE IS ANY PROBLEM FULFILLING THIS

ORDER AS REQUESTED FOR ON-TIME DELIVERY.

Please ship ON or BEFORE above specified Ship Date.
Please key pkg. and reel w/ list name, qty. &  mailer key: HC072.
```

Figure 4-6. Sample Printed Order

BOOMS recognizes two special printer types, "**PRINTC(FAXBOX)**" and "**PRINTC(ZETAFAX)**", to allow the printing of an Invoice, Job Notification or Management Service Fee Invoice directly to a "**FAXBOX**", a fax machine that can be connected directly to a PC or through "**ZETAFAX**", a software faxing program. The following procedure occurs when you do this (the FAX number is obtained from the Promotion File):BOOMS recognizes a special printer type, "**PRINTC(FAXBOX)**" to allow the printing of an Order directly to a "FAXBOX", a Fax Machine that can be connected directly to a PC. The following processing occurs when you do this (the fax number is obtained from the Promotion File):

For a "Brokerage" Order, the fax is sent to the List Owner.
For a "Management" Order, the fax is sent to the List Owner's Service Bureau.
For an "Acquisition" Order, the fax is sent to the Broker (or List Owner, if the Order is direct).

When you request a Print, BOOMS pauses with the following prompt:

SendFax: t,ccccc; ffffffffff; F2/F4,F8

where:

"**t,ccccc**" is the promotion file "type" and "code" (e.g. "S,WILND")
"**ffffffffff**" is the fax number

Press "F2" to continue the fax transmission. Press "F4" to cancel the fax. Press "F8" to manually specify SENDFAX parameters (you will be presented with the SENDFAX Parameters screen; See Appendix K).

☞ **BOOMS will send a comment line to the FAXBOX printer. The comment includes the Order Number and the current BOOMS Signon-ID.**

Printing 3-Part Orders (Shift-F2)

This option presents you with the following choices as indicated by the status message:

F5=3-Part F6=Part1 F7=Part2 F8=Part3

F5 = allows you to print a 3-part, sequence numbered, Order. Part 1 is intended to be the in-house copy, part2 is intended for the Mailer/Broker (Owner information is not printed) and part 3 is intended for the Owner/Service Bureau. Also, if the Order option is "Ship Direct = No" then your Ship-to address is printed on part 3 (you must create the "S" entry on the Promotion file)

F6 - prints Part 1 only.
F7 - prints Part 2 only.
F8 - prints Part 3 only.
F4 - as always, is the Cancel key

For 3-Part Orders, parts 1 and 2 are printed with no "blockout". Part 3 is printed with "blockout". 3-part Orders are not appropriate for automatic faxing (i.e. Using the ZETAFAX or FAXBOX printers).

Promotion File Maintenance (Ctrl-F4)

The Promotion File Maintenance screen can be displayed directly from Order Entry by selecting option "Promos" (Ctrl-F4). If an Order is currently displayed, the Mailer's promotional entry will be displayed. This option is described in Chapter 6.

List File Maintenance (Ctrl-F6)

The List File Maintenance screen can be displayed directly from Order Entry by selecting option "Lists" (Ctrl-F6). If an Order is currently displayed, the List's entry will be displayed. This option is described in Chapter 7.

DataCard Entry/Edit (Ctrl-F8)

The DataCard Entry Main screen can be displayed directly from Order Entry by selecting option "DataCrd" (Ctrl-F8). If an Order is currently displayed, the DataCard will be displayed. This option is described in Chapter 8.

Cancel an Order Toggle (F4)

An Order that is currently being displayed can be "Canceled" (F4) or "Uncanceled" (F4). The option "Cancel" (F4) acts as a TOGGLE to alternately Cancel and Uncancel an Order. The current setting of the toggle is displayed in the Order STATUS Area. If an Order is in CANCEL mode, the visual "**CANCELED**" appears. Otherwise, no visual appears. Canceled Orders are not deleted from the system. Instead, they are printed with a "CANCELED" banner (Such Orders are usually invoiced for running charges). If an Order is to be "Killed" (marked "DEAD"), it must first be canceled by Order Entry.

☞ **If a "Dead" Order is "uncanceled", the "DEAD" flag is removed.**

Hold an Order Toggle (Shift-F4)

An Order that is currently being displayed can be Held (Shift-F4) or Released (Shift-F4). The option “Hold” acts as a TOGGLE to alternately Hold and Release an Order. The current setting of the toggle is displayed on the Status Line. If an Order is HELD, the Visual “**Held**” appears. Otherwise, no visual appears. “HELD” Orders are not eligible for Posting and Invoicing.

Kill an Order Toggle (Alt-F4)

A “Canceled” Order that is currently being “Displayed” can be “Killed” (Alt-F4) or “Revived“ (Alt-F4). The option “Kill” acts as a TOGGLE to alternately “Kill” and “Revive” an Order. The current setting of the toggle is displayed on the Order Status Line. If the Order is in “Kill” mode, the visual “**DEAD**” appears. Otherwise, there is no visual. Dead Orders are not deleted from the system. However, none of the information from such Orders is input to the BOOMS Accounting System.

☞ **You cannot “Kill” an Order that is currently Accounted. That can only be done from the “Invoicing/Posting” Screen (Chapter 5).**

Credit Risk Toggle (Alt-F3)

An Order that is currently being displayed can be flagged as a “Credit Risk” (Alt-F3) or NOT a “Credit Risk” (Alt-F3). The option “Credit Risk” acts as a TOGGLE to alternately flag and unflag an Order as a “Credit Risk”. The current setting is displayed on the Status Line. If an Order is flagged as a “Credit Risk”, the visual “**CR-Risk**” appears. Otherwise, no visual appears. If a “Management Order” is flagged “CR-Risk”, “canned Special Instruction” number “**J930**” will automatically be placed on line 3 of the Invoicing Special Instructions screen when “F4“ (Clear) is pressed. This feature can be used to indicate that the List Owner has accepted a “Credit Risk”. You must create/modify Instruction #930 with the appropriate wording.

Guarantee of Payment Cycle (Shift-F8)

An Order that is currently being displayed can be cycled through no guarantee of payment and 4 types of guarantee. The option “Guarantee of Payment” (Shift-F8) cycles through the following (as indicated on the “Status Line”).

Guar-nn - General Guarantee (you must fill in the number of days on a Special Instruction).

Guar-30 - 30-day Guarantee of payment

Guar-45 - 45-day Guarantee of payment

Guar-60 - 60-day Guarantee of Payment

“**blank**” - no Guarantee

Guaranteed Orders are related to “Canned” Special Instructions 900, 909 and 910 as follows (all require the number of days for the guarantee to be at offset 40 in the text):

```
900 BROKER GUARANTEES PAYMENT ON THIS ORDER ___ DAYS FROM INITIAL MAIL DATE.
909 ***TLC GUARANTEES PAYMENT ON THIS ORDER ___ DAYS FROM INITIAL MAIL DATE.
910 BROKER GUARANTEES PAYMENT ON THIS ORDER ___ DAYS FROM INITIAL MAIL DATE.
```

Number “909” is used for a “Brokerage” Order and number “910” is used for a “Management” Order. Number “900” is used for Invoicing.

User Flag Toggle (Alt-F8)

An Order that is currently being displayed can be associated with a flag that has meaning to you. The option “USERFLG” (Alt-F8) acts as a TOGGLE to alternately turn the flag on and off. The current setting of the flag is displayed on the screen (above the Order Number). If the flag is on, the word “USER*FLG” appears. Otherwise, the area above ORDER NUMBER is blank. The “USER*FLG” can be tested using the “Report Writer”. This function is valid even if the Order is under Accounting control.

Revision Mode Toggle (F8)

All Orders entered into the system can be Updated. However, updating an Order does not imply that the Order has been REVISED. REVISION can be viewed as a phase in the life cycle of an Order. Updating is merely the changing of information for an Order. These changes can occur at any time: after the Order is first added, anytime before the original Order is sent out, or before a REVISED Order is sent out. Only updates made after the original Order is sent out are considered revision updates.

Setting Revision Mode ON (F8) indicates that any updates to an Order from this point on are to be viewed as REVISIONS TO THE ORIGINAL ORDER.

> ☞ **Note that these revisions are cumulative. That is, if three revisions are sent out, the third revision will also reflect the changes made in the prior two (cumulative revisions can be reset by toggling revision mode OFF and ON).**

When an Order is in Revision Mode, BOOMS maintains a record of changes made. When the Order is printed, the revised fields are printed in **Double strike** or Underlining (as determined by a "Global Parameter": see Chapter 24).
Revision Mode can be TOGGLED OFF by again selecting Option F8.

If an Order is in "Revision" mode, the visual"REISION" appears on the Order Status Line. Otherwise there is no visual. Figure 4-7 is an example of a REVISED Order printed using underline to highlight Revisions.

```
                               ************
                               *-REVISION-*
  LOGO   227 TLC Lane          ************  ORDER DATE:     11-19-88
  LOGO   P.O. Box 1122
  LOGO   Tender, NY, 10011                   TLC   ORDER #:  003005
         212-666-2277

MAILER:   Hartley Stores                     Mailer Offer:   Sale Catalog
                                             KEY:            HC072

OWNER:    Orson's & Associates               SHIP DATE:      12-05-88

          ATTN: List Management
          New York, NY 10011                 MAIL DATE:      01-15-89 THRU
          (212)-334-4567                                     02-15-89

LIST:     Land and Land                      BASE PRICE:     $85.00/M
(12345)

SELECTS:  6 Month Buyers                     PRICE:          $10.00/M

QUANTITY: 30,000     **** MAXIMUM ****       TEST/CONT:      CONT

MATERIAL: 9T/1600 BPI MAG TAPE               PRICE:          $15.00
          Supply Dump & Layout

SHIP-TO:  CompuShop                          VIA:            FEDERAL EXPRESS #1
          ATTN: Bob Black
          1123 Evans Drive
          New York, NY 10013
          (212)-876-2359                     Contact:  Tom Broker
                                                       212-666-2277

------------------------- Special Instructions -----------------------
*-REVISION-* DATE: 12-01-88

NOTE CHANGE IN MAIL DATE.
Please key pkg. and reel w/ list name, qty. & mailer key: HC072.
THIS IS A CONTINUATION.  OMIT TLC ORDER(S): 002898 (516445B).
DO NOT DUPLICATE NAMES BEING SELECTED ON CURRENT TLC ORDER 003004.
```

Figure 4-7. Sample Printed "Revised" Order

Batch Print Overview

The Batch printing of Orders/Invoices is designed to:

- Reduce the amount of time required to Enter/Post an Order and then Print an Order/Invoice.
- Provide flexibility in the way that groups of Orders/Invoices are Printed.

By "Batching" the Printing of Orders/Invoices, less intervention is required on your part. When an Order is Added (F3), Updated (F5), or Canceled (F4) or when an Order is Posted for Invoicing (see Chapter 5), it is automatically marked for Batch Print. Instead of immediately Printing (F2) this Order/Invoice, you can proceed with the Entry or Posting of the next Order. Then, at some selected interval, a mass Print of these Orders can be done. During the printing you are free to perform other tasks. "Batch" Print of Orders/Invoices allows selective grouping of Orders based on various criteria. These criteria allow you to:

- Print all outstanding Orders/Invoices.
- Print outstanding Revisions only.
- Print outstanding Non-Revisions only.
- Print ranges of outstanding Orders/Invoices (without regard to Revision status).
- Print a single Order/Invoice (outstanding or not)
- Print Orders for a specific Mailer or Broker
- Print Orders/Invoices for a specific Salesperson.

Batch Print Selection

"BATCH" Print is selected by option "Batch Print" (Shift-F2) from the Order Entry Main screen or the Orders Posting/Invoicing Main screen, by selecting Function "Orders", Sub-function "Batch Print" ("O3") from the Main Selection Menu or by selecting Function "Accounting", Sub-Function "Batch Print" ("A3") from the Main Selection Menu. Selecting any of these options results in:

- The overlaying of the lower part of the screen by the Batch Print Window (Figure 4-8)
- STATUS message: "Enter Values in WINDOW below"
- The positioning of the cursor at the first input field

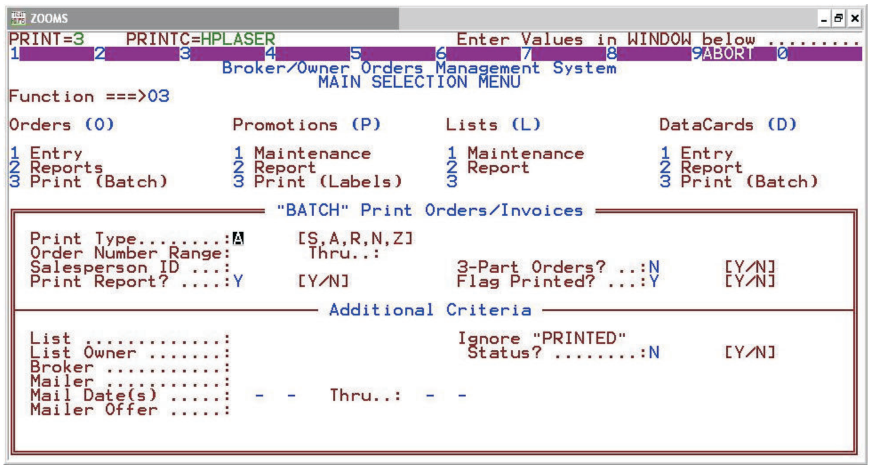

Figure 4.8. "Batch" Print Window.

Following are the definitions for the input fields:

- Print Type is one of the following characters:

A = all outstanding Orders/Invoices

R = Revised outstanding Orders/Invoices only

N = Non-revised outstanding Orders/Invoices only

S = SETUP Report only (See Batch Print Setup Report)

Z = Print a SETUP Report sorted by "**Fax-To**" and "**Order Number**". This is the sequence that Orders will be sorted when printing to the ZETAFAX printer (PRINTC=ZETAFAX).

- ***Order Number Range...thru -*** starting/ending numbers of outstanding Orders/Invoices to be Printed. These values determine the range of Orders to be scanned for outstanding Orders/Invoices (i.e. scheduled for BATCH Print).

> ☞ **IF ONLY ONE ORDER NUMBER IS ENTERED, THAT ORDER/INVOICE WILL BE PRINTED EVEN IF IT IS NOT OUTSTANDING.**

- ***Salesperson ID*** - used to indicate a specific salesperson for which Orders (or Invoices) are to be printed. (Default is to print all Orders/Invoices regardless of salesperson)
- ***Print Report?*** allows you to suppress the printing of the "Orders Batch Print" Report. By default (Y) the report is printed.
- ***3-Part Orders?*** - indicates ("Y") that 3part Order should be printed
- ***Flag Printed?*** - indicates ("N") that Orders should not be flagged "printed". This allows the same batch to be reprinted. The default is "Y".

Additional Criteria -----------------------.

- **Ignore Printed Status?** - Indicates ("Y") that Orders can be selected for Batch Printing EVEN if their current status shows that they are not eligible for Batch Print

> ☞ **This option may be useful, for example, if you need to re-print a batch of Orders/Invoices to be attached to an Email. NOTE: YOU SHOULD ONLY USE THIS OPTION IF YOU HAVE A SPECIFIC REASON TO DO SO. IT IS NOT INTENDED FOR GENERAL USE.**

- **List** - allows the printing of Orders (or Invoices) for a specific List
- **List Owner** - allows the printing of Orders (or Invoices) for a specific List Owner
- **Broker** - allows the printing of Orders (or Invoices) for a specific Broker.
- **Mailer** - allows the printing of Orders (or Invoices) for a specific Mailer.
- **Mail Date(s) … Thru** - allows the printing of Orders (or Invoices) for a specific Mail Date range (or single Mail Date).
- **Mailer Offer** - allows the printing of Orders (or Invoices) for a specific Mailer Offer.

Batch Print Setup Report

Each BATCH PRINT run produces a SETUP Report containing the following information:

- Order Number
- Order Date
- Order Type (PRT-B, for Print Brokerage, or PRT-M, for Print Management)
- CANCELED/REVISED flag indicates if an order is CANCELED, REVISED or HELD. If it is HELD, Order type will be "blank".
- List Number
- Mailer
- Broker
- Ship-to

If you specify PRINT TYPE = "S", you will just get this SETUP Report and no Orders will actually be Printed (However, all Orders that were eligible for Printing are still eligible). Figure 4-9 is an example of a "BATCH Print" Report.

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Salesperson: ORDERS "BATCH" PRINT

ORDER NUMBER	ORDER DATE	ORDER TYPE	CANCELED/ REVISED	LIST NUMBER	MAILER	BROKER	SHIP-TO
003410	01-10-89	PRT-B		01000	FIELD	TLC01	DONOT
003411	01-10-89	PRT-B		01308	FIELD	TLC01	DIRTE
003412	01-10-89	PRT-B		40200	FIELD	TLC01	DONOT
003413	01-10-89	PRT-M	REVIS	15835	SPEIG	DIRME	CCX
003414	01-10-89	PRT-M	REVIS	15835	SPEIG	DIRME	CCX
003415	01-10-89	PRT-M		03300	URKCO	TLC01	DONOT
003416	01-18-89	PRT-B		13000	FIELD	TLC01	ANCHO
003417	01-10-89	PRT-B		21000	FIELD	TLC01	ANCHO
003418	01-10-89	PRT-M		16000	INTCO	AZLII	DIRTE
003419	01-10-89	PRT-M		15000	FIELD	TLC01	ANCHO

Figure 4-9. Sample "Batch" Print Setup Report

Post Shipping Information (Alt-F5)

An Order this is currently printed and displayed can have its shipping information posted by selecting option "Post Shipping information" (Alt-F5). This results in the "POST SHIPPING INFORMATION" Window overlaying the bottom part of the screen (See Figure 4-10). From this window you will be allowed to update:

- Shipped Rental Quantity
- Shipped Exchange Quantity
- Shipping Technique (Via)
- Ship Date
- Shipping Charges
- List Owner's Purchase Order (Confirmation) Number
- Names Through (not printed on an Order/Invoice)
- Received Quantity (not printed on an Order/Invoice: See NOTE below)

These fields, except as noted, have the same meaning as the corresponding fields from the "POSTING/INVOICING" screen. They are presented here to provide a means of posting shipping information without requiring access to Invoicing. Upon display of this window, you will be placed in "Display-Only" mode if any of the following are true:

- you are not authorized to post shipping information
- the Order is not currently marked "printed" or
- the Order is currently under Accounting control

☞ **Function Update ("F5") allows tthe update of "*Received Quantity*" even if the Order has already been Accounted. *Received Quantity* is a field that can be used by the Report Writer and does not affect BOOMS Accounting. "F5" is only active IF (1) you are authorized to update Shipping Information and (2) Shipping Information has already been posted (i.e. a *Post Date* has been assigned)**

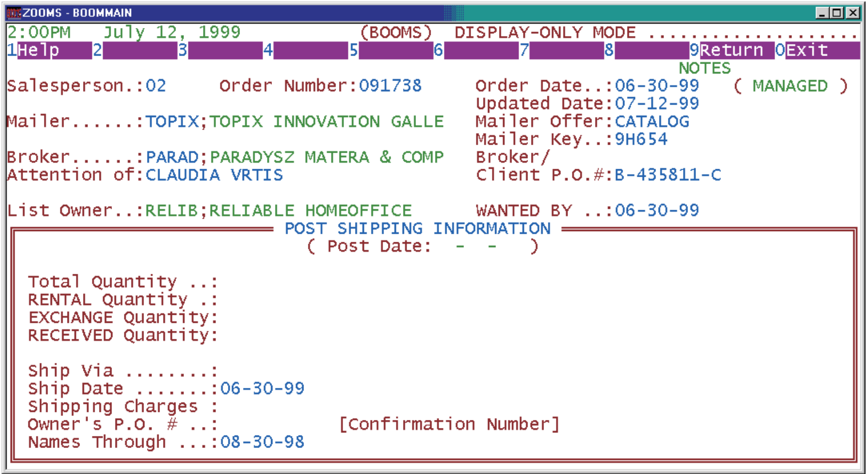

Figure 4.10. "Post Shipping Information" Window

☞ **If Shipped Quantities are not entered (i.e. they are left "blank"), the Order will not be flagged "ShipPost" (See Chapter 5).**

If the Quantity changes from 100% Rental to 100% Exchange (or vice versa), you will be prompted with "Are you Sure?" to confirm the change.

If Shipping Information is posted from this Window, the "Post Date" is fixed at the time of posting. However, if Shipping Information is posted from the "Invoicing/Posting" screen, the "Post Date" will be reset to "zero" if the Order is "FREED" back to Order Entry (See Chapter 5).

An Order can have Shipping Information "un-posted" by clearing the Rental/Exchange quantity fields. This is intended to allow correction of an erroneously posted Order before it is Invoiced.

Orders Reporting

The Orders Reporting Screen (See Figure 4-11) is displayed upon selecting Function "O", Sub-Function "2" ("O2", Orders Reports) from the Main Selection Menu. This Window is divided into 2 parts: Part 1 (top Part) contains the titles of the various reports that are available and, in general, for whom the report is intended. These reports include:

- Orders Log - all Orders
- Open Orders Log - all Non-Invoiced Orders
- Open Accounting Log - all Orders not yet on Accounts Receivable/Accounts Payable
- List Usage (by type of Mailer)
- Mailer Usage (by List or Order Number)
- Shipping Orders Log
- List Rental Summary
- Broker Usage (by Mailer and List) - this can also be one of your Brokers
- Management Booking Report
- Management Billing Report
- Management Exchange Status Report
- Management Exchange Status Recap
- Management Service Fee Report

- Management Sales Log - this is a "log" format, in Order Number sequence.

In order to select a report, its 2-character ID is entered in field "Report". For example to select a List Rental Summary, enter "B1" or to select a Booking Report enter "M2". If you enter an invalid report id, you will receive error message:

VALUE FOR FIELD IS INVALID, RE-ENTER

Upon entry of a valid report id, the cursor will move to part 2, ADDITIONAL QUALIFICATION. Depending on the type of report selected, you will only be permitted to enter relevant information. If the cursor is positioned in part 2 and you want to select a different report, press "Ctrl-Break" (or Alt-F9) to return the cursor to the "Report" field.

☞ **You can go directly to Promotion File Maintenance (Ctrl-F4) or List File Maintenance (Ctrl-F6) to verify any codes or List number.**

The input fields are:

- ***Begin/Mail Date*** - beginning Order date, beginning Invoice date, or Mail date. Begin Date is used in conjunction with End Date to limit the scope of most reports (e.g. Monthly, Quarterly, or year-to-date). A single Mail Date is used for the List Rental Summary Report
- ***End Date -*** used in conjunction with Begin Date
- ***List Number*** - List Number from the List File. It can be used to limit the scope of some reports.
- ***LOW Order Number*** - used in conjunction with HIGH Order Number to limit the scope of some reports. The Order Numbers default to the range of numbers defined for your location. Other numbers could be entered, for example, to report on orders that have been merged from a Branch Office.
- ***HIGH Order Number*** - used in conjunction with LOW Order Number to limit the scope of some reports.
- ***Mailer Offer*** - used to distinguish between two different offers with the same Mail Date (for the List Rental Summary Report). If there is only one offer for a selected mail date, there is no need to enter the Mailer Offer.
- ***Broker Code*** - identifies the Broker for the Broker Usage Report.
- ***Mailer Code 1*** - identifies the Mailer. It can be used to limit the scope of some reports.
- ***Mailer Code 2*** - identifies the other Mailer for the Exchange Status Report.
- ***Category Codes*** - used to limit the List Usage [by Type of Mailer] report to specific mailer types. Category codes is a series of 2-character codes (max 10 codes). If one of the category codes for a mailer matches one of these codes it is selected for print.
- ***Test/Continuation*** - used to limit the scope of some reports to just TESTS or just CONTINUATIONS.
- ***Rentals/Exchanges*** - used to limit the scope of some reports to just RENTALS or just EXCHANGES.
- ***Sales ID*** - is used to limit the scope of some reports to just Orders for the indicated salesperson.
- ***Ordered/Shipped?*** - for the Management Exchange Status Recap, indicates ("O") that a combination of Ordered and Shipped quantities should be reported (the default) or "S", only Shipped Quantities should be reported.

Once you have filled in the required values and pressed "Enter", the report will print. You will receive two different status messages from BOOMS:

Searching in Progress ....
nnnnn Record(s) Reported ....

The first message is displayed while BOOMS is searching for the first record to print. Once a record has been found, the second message will be displayed. "nnnnn" will be a running count of the number of Orders reported.

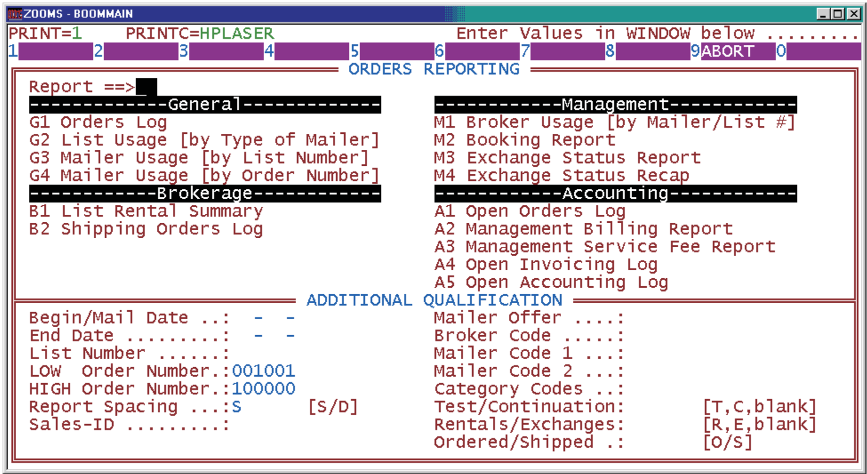

Figure 4.11. Orders Reporting Window.

Orders Reporting (Additional Qualification)

In general, parameters are used to limit the scope of a report. Any special considerations are noted.

Order Log (G1)
Parameters: Begin/End Dates, Low/High Order Number, Report Spacing, Sales-ID, List Number, Broker Code, Mailer Code, Mailer Category Codes.

List Usage [by type of Mailer] (G2)
Parameters: Begin/End Dates, List Number, Mailer Code, Category Codes, Test/Continuation, Exchange/Rental

> List Number can be "ALL" to print information for ALL Lists, or "blank" to print information for "ALL MANAGED" Lists. If "ALL" is specified and the scope of the report is not restricted, this can be a very large report. This report includes DEAD Orders.

Mailer Usage [by List Number] (G3)
Parameters: Begin/End Dates, List Number, Mailer Code, Mailer Offer, Test/Continuation, Rental/Exchange, Sales-ID, Broker Code

> Mailer Code can be "ALL" to print information or ALL Mailers. If "ALL" is specified and the scope of the report is not restricted, this can be a very large report. This report includes DEAD Orders.

Mailer Usage [by Order Number] (G4)
Parameters: Begin/End Dates, Low/High Order Numbers, List Number, Mailer Code, Mailer Offer, Test/Continuation, Rental/Exchange, Sales-ID, Broker Code

> Same format as Report "G3". This report includes DEAD Orders.

List Rental Summary (B1)
Parameters: - Mail Date, Mailer Offer, Mailer Code

> Mail Date and Mailer Code are required. Mailer Offer can be used to distinguish between two mailing on the same Mail Date.

Shipping Orders Log (B2)
Parameters: Begin/End Ship Dates, Low/High Order Numbers, Mailer Code, Spacing, Sales-ID

Broker Usage (M1)
Parameters: Begin Date, End Date, Broker Code, Mailer Code

> Broker Code can be "ALL" in which case ALL BROKERS are reported (EXCEPT FROM YOUR COMPANY).

Management Booking Report (M2)
Parameters: Begin Date, End Date, List Number, Tests/Continuations

List Number must be either a Managed List or “blank” in which case ALL MANAGED LISTS are reported.

Exchange Status Report (M3)
Parameters: Begin Date, End Date, Mailer Code 1, Mailer Code 2

The Mailer Codes are required and indicate the two Mailers for which “detail” Exchange information is required.

Exchange Status Recap (M4)
Parameters: Mailer Code , Ordered/Shipped

Mailer Codes can be “ALL” in which case all Tracked Mailers are reported. By default, Ordered Quantities are used to report Exchange Balances if the Orders have not shipped. If “Ordered/Shipped” is set to “S”, ONLY shipped Orders are reported. NOTE: This report has a limit of 450 exchange relationships. Use “EXCHPRT4” (See Report Writer) to avoid this limitation.

Open Orders Log (A1)
Parameters: List Number, Mailer Code, Begin/End Mail Dates, Low/High Order Numbers, Spacing, Sales-ID, Rental/Exchange

This report includes only those orders that have not been Invoiced.

Management Billing Report (A2)
Parameters: Begin/End Dates, List Number

List Number must either be a Managed List or “blank” in which case ALL MANAGED List are reported.

Management Service Fee Report (A3)
Parameters: Begin/End Dates, List Number

List Number must either be a Managed List or “blank” in which case ALL MANAGED List are reported.

Open Invoicing Log (A4)
Parameters: List Number, Mailer Code, Begin/End Mail Dates, Low/High Order Numbers, Spacing, Rental/Exchange, Sales-ID

This report includes only Orders that are flagged to be invoiced, but not yet invoiced..

Open Accounting Log (A5)
Parameters: List Number, Mailer Code, Begin/End Mail Dates, Low/High Order Numbers, Spacing, Rental/Exchange

This report includes only Orders that have not been Accounted (i.e. not currently on Accounts Receivable and/or Accounts Payable).