

# Promotion File Processing

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Promotion File Overview.....6-2

Contents of the Promotion File.....6-2

Promotion Status Flags.....6-4

Promotion File Maintenance .....6-4

Add a Record (F3, Shift-F3, Ctrl-F3).....6-5

Update a Record (F5).....6-6

Display a Record (F7, Shift-F7, Ctrl-F7).....6-7

Delete a Record (F4).....6-7

Hold a Record Toggle (Shift-F4).....6-7

Credit Hold a Record Toggle (Ctrl-F4) .....6-7

Notepad Facility (Alt-F6) .....6-7

Agency Toggle (F8) .....6-8

“1099+” Toggle (Shift-F8).....6-8

Promotion File Printout .....6-8

Mailing Labels .....6-9

## Promotion File Overview

The "Promotion" File contains both "client" (Order-related) and "promotional" (mailing labels) information. Client information is required for the Order Entry & Accounting System to function properly. Promotional information is useful for maintaining customer lists (e.g. prospecting information). The main distinction between the two is that Client information refers to "companies" while Promotional information refers to individual "people". Thus, there should only be one Client entry that refers to a particular company. For example, if brokerage company "ABC" is defined, then the code "ABC" **would always** be used on any Order that referenced that company. However, there may be multiple people at "ABC" to whom you wish to send Promotional literature. These could be defined, for example, as "ABCXX" or "ABCYY". These codes **would never** be referenced by Order Entry.

The Promotion File is further divided into "Subfile Types". These "Types" are used to store Client information about BROKERS, MAILERS, LIST OWNERS, Computer Houses (SHIP-TO & SERVICE BUREAU), SALESPEOPLE, and additional Accounting Information (VENDORS, SALES TAX, INVOICE-TO, Accounts Payable). This information is used extensively for Orders, Invoices and Accounting Processing.

In addition, there must always be one special entry on the Promotion File that describes your company to the System. This entry, which is of type "L" (for Licensed User) was placed on the Promotion File that was provided to you. Also, there must be an entry for each BROKER and MANAGER in your company. These entries which are of type "P" (for Salesperson) are used to identify your salespeople. These Salesperson codes must be of the following format:

- The first 3 characters must match the first 3 characters of your company code (from the type "L" entry)
- Characters 4 and 5 must be numeric and must match the Salesperson ID that is assigned to a Broker or Manager.

Because only the Promotion File CODES are contained in an Orders File Record, once a Promotion File Record is defined and used for an Order it should never have its code changed. If this code does change, the Reporting and Accounting Systems will be unable to retrieve proper information about it.

## Contents of the Promotion File

Following are the contents of a Promotion File record:

- **Company Code** - is a Client code referenced by Orders processing to obtain information about a particular Promotion File entry. This is a 5-character ALPHANUMERIC field. IT CANNOT BE ALL NUMERICS.
- **Type** - 1-character subfile code that classifies the entry as:
  - B** Broker
  - O** Owner (List Manager)
  - M** Mailer
  - S** Ship-to/Service Bureau
  - P** Salesperson (for Account Executives)
  - Q** is a special type that allows "Quick" entry of matching Owner and Mailer codes. When "adding" promotion records, specifying a type of "Q" will actually result in two record (Type=O and Type=M) being added.
  - L** Licensed User
  - T** Sales Tax Account
  - I** Invoice-to (and Accounts Receivable)
  - A** Accounting (Accounts Payable)
  - C** Checks (Accounts Payable)
  - V** Vendor (for Operating Expense Check Writing)
  - G** Group (Corporate) Entries used by Exchange Balance Processing

 If you want to create new Promotional types (e.g. for "prospecting"), use only the letters "X", "Y" & "Z" or numbers "0" through "9". Lissan Computing reserves the right to use letters "A" through "W" in future releases of BOOMS.

- **Company Name** - 32-character Company Name.

- **Sort Code** - 12-character sort sequence when displaying promotional entries in alphabetical sequence (as opposed to "Company Code" sequence). When a new entry is added and this field is left "blank", it will default to the first 12 characters of the "Company Name" field. It may be useful to enter a Sort Code in situations where the Company Name begins with a "THE" or "A" (e.g. "The ABC Company" could be entered with a "Sort Code" of "ABC Company").
- **Category Codes** - series of 2-character entries (max 10 entries; there is no punctuation between entries) that describe a Mailer's offer or in some way classify an entry. The definition of these codes have no special meaning to BOOMS. However, the reporting system will allow you to take advantage of any coding system that you have setup.
- **Valid for Order Entry?** - is a value that indicates that an entry is valid for Order Entry ("Y") or not ("N"). If the entry is not valid, you will receive the following message if you try to use it when adding an Order:

**NOT VALID FOR ORDER ENTRY**

- **Contact** - 28-character name of the person to whom a mailing label should be addressed for Promotional purposes. This is also the name that will appear on an Invoice to the company being billed. In addition, contact information will be carried forward to an Order if the "ATTN" information is not entered on the Order.
- **Title** - is Mr, Ms or Dr. This field is not used for addressing in BOOMS, but is available through the Report Writer.
- **Street Address** - 28-character street address for the company.
- **Additional Street Address** - 28-character additional street address line.
- **City** - 20-character city name.
- **State** - 2-character state code.
- **Zip Code** - 10-character Zip Code. 5-digit Zip Codes are printed only if they are non-blank. Carrier routes are printed only if they are non-blank. This field allows entry of Canadian codes.
- **Phone Number** - 10-character phone number.
- **Fax Number** - 10-character FAX Number to be used by the Faxing system (FAXBOX) and Reporting system.
- **Email Address** - 50-Character "Contact" email Address.
- **Exchange Fee** - Exchange Fee charged to a Mailer (or by a Broker) for the use of a List. This value can be a flat fee or a per thousand charge.
- **Minimum Exchange Fee** - Minimum Exchange Fee charged to a Mailer (or by a Broker) for the use of a List.
- **Maximum Exchange Fee** - Maximum Exchange Fee charged to a Mailer (or by a Broker) for the use of a List. This value WILL NOT override any value that is entered on a Single Order Discount Record.
- **Rental Service Fee** - Service Fee charged to a Mailer. Charging a Service Fee does not eliminate Brokerage Commission. Use normal Mailer Discounting if you wish to rebate Brokerage Commission to the Mailer. This value can be a flat fee or a per thousand charge. A per thousand Mailer Service Fee can be further qualified with "S" (/MS) or "N" (/MN) to indicate that the fee is based on either the "Shipped" quantity or the "Netname" quantity (default is Netname quantity).
- **Mailer Discount Type** - can be "T" (standard 10% Discount: if broker commission is 20% for a List, then ½ (10%) of the commission is discounted to the Mailer (or from the Broker) when ordering that List) or "S" (a Discount Record exists for this Mailer or Broker).

 An existing Discount Schedule record (See Chapter 19) will not be used if this field is not set to "S". This allows the schedule to be turned off without deleting it (perhaps to be reinstated at a future date).

- **Sales Tax Exempt** - indicates ("Y") that the Mailer or Broker entry is Sales Tax Exempt. By default Mailers and Brokers are NOT Sales Tax Exempt.
- **Sales Tax Percent** is the percentage to be charged for Sales tax (Sales Tax Account only).
- **Sales Tax Account** - indicates, for a Mailer or ShipTO, the Company Code (TYPE=T) containing Sales Tax information (i.e. Account Name, percent, etc.). Note: the 1st 2 characters of this field must match the State Code where Sales Tax applies (e.g. "NY001").
- **Alternate Type For Invoicing or A/P** - By Default ("blank"), BOOMS will use the name and address from the current entry when it is referenced for Accounting purposes (Invoicing, A/R, A/P, etc). In a situation where the paperwork will go to an alternate location (name & address) enter an "I" or "A" in this field and create an entry with the same "code" as the current entry but with a type of "I" or "A". The override name & address will appear on all accounting reports. Normally, you would use either "I" or "A" for all overrides. The exception is when

overrides are required for both receivables and payables. In this case, the receivable (e.g. from a mailer) would use an "I" override and the payable (e.g. to a list owner) would use an "A" override. In addition, an "A" type can be further overridden by a "C" type resulting in A/P Statements and Reports (type "A") going to a different location from A/P Checks (type "C").

- **Line 1 Contact, Line 2 Contact, Line 3 Contact** - (for Type "P" entries only) is 3 lines of "contact" information to appear at the bottom of a printed Order (before special instructions) and on certain reports. This is usually name and phone number information.
- **Canned SI#** - (for Type "P" entries only) is a "canned" Special Instruction (See Chapter 15) that will be placed automatically on Line 11 of Special Instruction for an Order. (See Chapter 4).
- **Creation Date** - date that the entry was Added.
- **Last Used Date** - date that the entry was last used by ORDERS PROCESSING (If "blank", it has never been used).
- **Modified Date** - date that the entry was last Updated (If "blank", the entry has never been Updated).

### Promotion Status Flags

The "Promotion Status Line" (The line above "Basic Promotion Information") can show the following status indicators for the entry being displayed:

- **Held** - entry is being Held. It cannot be used by Order Entry
- **Credit-Held** - entry is being held for "Credit". It cannot be used by Order Entry
- **[AGENCY]** - entry (typically a "B" Type) is flagged as an "Agency". This indicator will appear on the invoicing screen so that appropriate action can be taken regarding the agency (e.g. reduced commission).
- **[1099+]** - entry is flagged for "1099+" processing.
- **DEFERDEL** - entry is flagged for "deferred delete"
- **NOTES** - information for this entry exists on the "notepad"

### Promotion File Maintenance

Promotion File Maintenance is selected by Function, "Promotion File", Sub-Function "Maintenance" ("P1") from the Main Selection Menu. Selecting this Option results in:

- Replacing of the current screen by the Promotion File Maintenance Screen (Figure 6.1 and Figure 6.2).

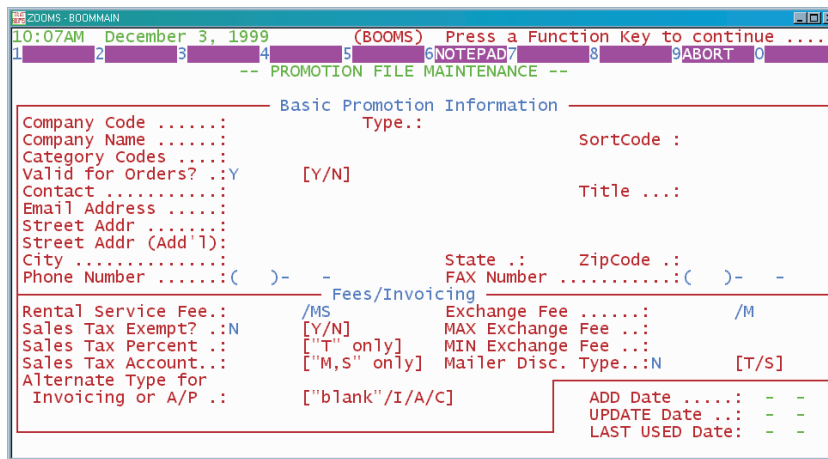


Figure 6.1. Promotion File Maintenance Screen (all except Type=P)

- Disappearance of the cursor
- Status message:

**Press a Function Key to continue**

You must press a Function Key to select (enable) 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 Promotion File entry
- **Shift-F3** - ADD-NOCLEAR a new Promotion File entry
- **Ctrl-F3** - ADD-DUPLICATE a new Promotion File entry
- **F4** - DELETE an entry
- **Shift-F4** - HOLD an entry Toggle
- **Ctrl-F4** - CREDIT HOLD an entry Toggle
- **F5** - UPDATE a Promotion File entry
- **Alt-F6** - NOTEPAD Facility
- **F7** - DISPLAY an entry
- **Shift-F7** - Display next entry (same as PgDn)
- **Ctrl-F7** - Display previous entry (same as (PgUp)
- **F8** - AGENCY Toggle
- **Shift-F8** - "1099+" Toggle

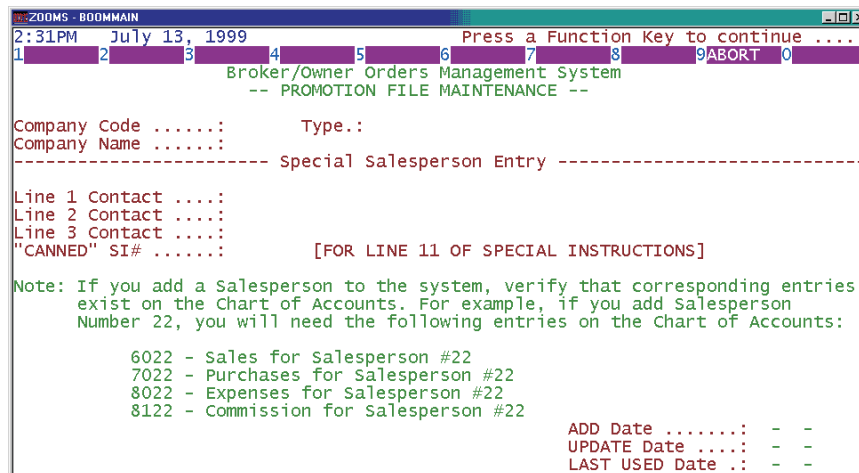


Figure 6.2. Promotion File Maintenance Screen (for Type=P)

**Add A Record (F3, Shift-F3, Ctrl-F3)**

To Add an entry to the Promotion 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 (COMPANY CODE)

Input fields are then filled in the same manner as all data entry screens. That is, after data is entered into a field, the "ENTER" key is pressed, and the cursor moves to the next input field. After the last input field is entered, the record is Added to the Promotion File if:

- Required fields are not "blank" and
- The key of the Promotion file record being Added is not identical to a record already on the file. A key is identi-

cal if both the “Company Code” and “TYPE” are the same.

Successful addition of a record to the Promotion File results in:

- STATUS message:  
**ADDED .....**
- An automatic UPDATE of the “CREATION DATE” output field (with the current date).

On some occasions, it may be desirable to Add a series of records to the Promotion File that contain similar information (typically Company Name and Address). 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 “Company Code” or “Type” must be changed or you’ll get a “DUPLICATE RECORD” error message). Also, when adding entries for types “B”, “O”, “M” and “S”, an entry will not be added if the same code already exists for one of the other three types **AND** the company name is different (e.g. you cannot add a Mailer with a code = “ABC”, Name = American Business Compilers, if a Broker already exists for code = ABC, Name = Amex Brokerage Company). In order to add such duplicates, you must use option ADD DUPLICATE, (Ctrl-F3). Note that it is a not a good idea to create such conflicts since BOOMS uses these codes for accounting purposes and you may wind up with, for example, a receivable or payable from 2 different companies under the same code. Figure 6.3 is an example of a screen after a record has been Added to the Promotion File.

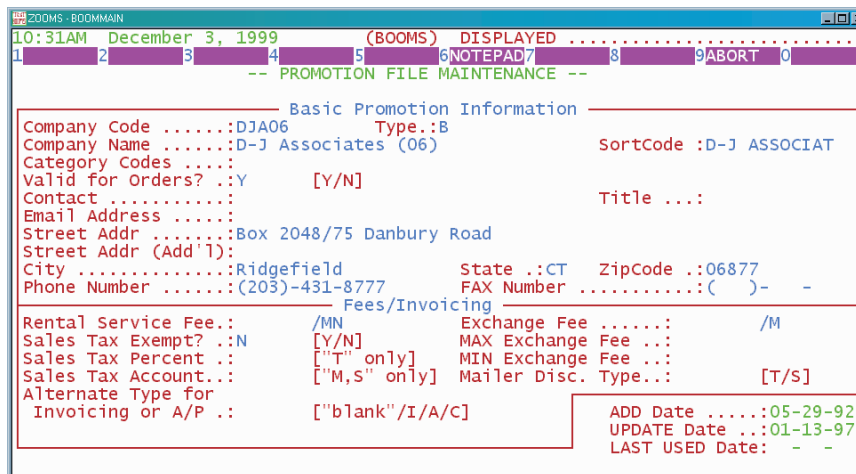


Figure 6.3. Promotion File Maintenance Screen (after Add)

## Update a Record (F5)

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

- STATUS message  
**UPDATE REQUEST .....**
- The positioning of the cursor at the first input field ELIGIBLE for Update

Fields are entered just as if they were being Added to the file. A successful Update results in:

- STATUS message:  
**UPDATED .....**
- An automatic update of the “MODIFIED DATE” output field (with the Current Date).

☞ If you update the “Sort Code”, you will be prompted for verification (As always, “F2” is a positive response, “F4” is a negative response):

**Verify Sort Code Change; “F2/F4”**

## Display a Record (F7, Shift-F7, Ctrl-F7)

Selecting option "Display" (F7) results in:

- STATUS message  
**DISPLAY Request .....**
- The positioning of the cursor at the first input field (Company Code)

The record will be Displayed after you fill in fields "Company Code" and "Type". If no records exists on the Promotion File with the Code and Type you entered, BOOMS will perform an "alternate" search based on the "Sort Code" (starting with the current "Type") and display the record with a matching Sort Code (or the next higher one, alphabetically, if there is no match). If the alternate search is performed you will receive status message:

**DISPLAYED ("ALTERNATE" SEARCH TYPE)**

If a record can be successfully retrieved from the Promotion File based on "Company Code" and "Type", you will receive STATUS message:

**DISPLAYED .....**


Once a record has been displayed, the following record can be displayed by pressing **Shift-F7** (Display Next) or **PgDn**. Also, the prior record can be displayed by pressing **Ctrl-F7** (Display Previous) or **PgUp**. In either case, if the first record being displayed was obtained by an "alternate" search, the records will be in Sort Code sequence (within "Type"). Otherwise, the records will be in Company Code sequence.

## Delete a Record (F4)

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

**DELETED .....**

Because entries on the Promotion File are critical to the proper operation of BOOMS, it is recommended that a limited number of people be allowed to deleted entries.

 A global option allows these delete requests to be deferred. That is, when "Delete" is requested, the entry is not physically deleted. Instead, it is put on HOLD and marked for "DEFERRED DELETE" The actual delete is done from the "FILES UTILITIES" screen (See Chapter 20)

## Hold a Record Toggle (Shift-F4)

An entry that is currently being displayed can be put on "Hold" (Shift-F4) or "Released" (Shift-F4). The option "Hold" acts as a toggle to alternately "Hold" and "Release" an entry. If an entry is currently on "Hold", the visual "HELD" will appear on the Promotion Status Line. A Held record cannot be used when Adding an Order (you will receive error message "INVALID ENTRY!! ITEM IS BEING HELD" if you try to use it).

## Credit Hold a Record Toggle (Ctrl-F4)

An entry that is currently being displayed can be put on "Credit Hold" (Ctrl-F4) or "Released from Credit Hold" (Ctrl-F4). The option "Credit Hold" acts as a toggle to alternately place an entry on "Credit Hold" and "Release" an entry from "Credit Hold". If an entry is currently on "Credit Hold", the visual "Credit-HELD" will appear on the Promotion Status Line. A Held record cannot be used when Adding an Order (you will receive error message "INVALID ENTRY!! ACCOUNT IS IN CREDIT HOLD" if you try to use it).

## Notepad Facility (Alt-F6)

Selecting option "NOTEPAD" (Alt-F6) when a record is being displayed, results in the displaying of the "NOTEPAD" screen. From this screen, you can enter up to 15 lines of 74-column informational text for the promotional entry. See Chapter 4 for a discussion of the Notepad Facility.

## Agency Toggle (F8)

An entry that is currently displayed can be flagged as an "Agency" (F8) or unflagged as an "Agency". The option "Agency" acts as a toggle to alternately flag and unflag an entry as an "Agency". If an entry is flagged as an "Agency", the visual "[AGENCY]" appears on the Promotion Status Line. If the entry is a "Broker", BOOMS uses this flag to display a "visual" (AGENCY) on the Posting/Invoicing screen.

## "1099+" Toggle (Shift-F8)

An entry that is currently being displayed can be flagged for "1099+" processing (Shift-F8) or unflagged for "1099+" processing (Shift-F8). The option "1099+" acts as a toggle to alternately flag and unflag an entry for "1099+" processing. If an entry is currently flagged for "1099+" processing, the visual "[1099+]" will appear on the Promotion Status Line. This flag is typically used on an Owner (Type "O") entry to allow the flagging of companies that should be sent a "1099" or other reports for tax purposes. Report Writer reports, "GENLPRT8" & "JOURPRT7" use this flag.

## Promotion File Printout

A listing (Printout) of the Promotion File can be obtained by selecting Function "Promotion File", Sub-function "Reports" (P2) from the Main Selection Menu. Selecting this Option results in:

- The overlaying of the Main Selection Menu with the Promotion File Report Window (Figure 6.4)

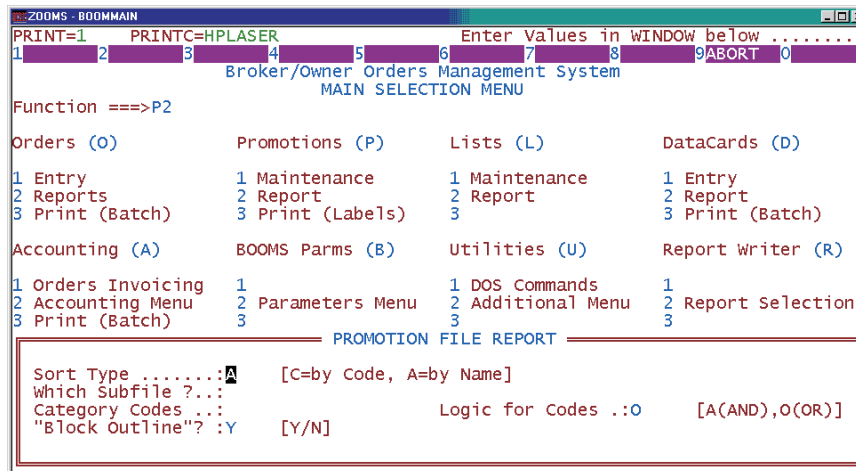


Figure 6.4. Promotion File Report Window

- The positioning of the cursor at the first input field ("Sort Type")

Valid values for this Window are:

- **Sort Type** is either "C" (Sort by COMPANY CODE) or "A" ( Sort by SORT CODE)
- **Which Subfile?** indicates the TYPE of the Promotion entries to be listed (i.e. B, O, M, S etc.)
- **Category Codes** - series of 2-character codes (maximum of 7, NO "blanks", NO "commas").
- **Logic for Codes** - If "O" (OR), then if a record contains any of the Category Codes specified above, then it is reported. If "A" (AND), then a record must contain "ALL" the category codes specified above in order to be reported.
- **Block Graphics?** - "Y" (default) results in the report having a more spreadsheet-like look. NOTE: when printing on a Laser printer (HP-compatible), "Block Graphics" requires the PC-8 Symbol Set. This can be set as the default for your printer (from the printer's control panel; e.g. on a LaserJet 4 select menu "PCL Menu", Item=SYMSET=PC-8). In BOOMS, you can also update the "Initial Setup String" for the printer characteristics that you will be using to print the report to: "1B451B2831305500" (all current definitions already contain this string).



As the report is printing, the following status message is displayed:

**nnnnn Record(s) Reported (kkkkk) .....**

where “nnnnn” is the number of records and “kkkkk” is the last “key” reported. “kkkkk” is either a “Company Code” (sort type “C”) or the 1st 5 characters of the “Sort Code” (sort type “A”). Figure 6.5 is a sample Promotion File Listing for the Broker Subfile.

January 23, 1989 2:17PM TLC Associates		Broker/Owner Orders Management System PROMOTION FILE LISTING: BROKER (SORTED BY COMPANY NAME)					PAGE 001	
BROKER	A.CODE	C.CODES	CONTACT	STREET ADDRESS CITY	ST ZIPCD	PHONE NUMBER	XFEE	
A. B. DATA LTD.	ABDAT	BN		8050 N. PORT WASHINGTON RD. MILWAUKEE	WI 53217	414-352-4404		
A. B. Data Ltd.	ADATA	BY	Jim Cowens	8050 N. Port Washington Rd. Milwaukee	WI 53217	414-352-4404		
Accredited Mailing Lists	ACCAB	BY	Ann Brock	3 Park Avenue New York	NY 10016	212-889-1180		
Accredited Mailing Lists	ACCJL	BY	Joe Lowry	7316 Wisconsin Avenue Bethesda	MD 20814	202-652-8096		
Action List Service	ACLIS	BN		35 E. Grassy Sprain Road Yonkers	NY 10710	914-337-7900		

Figure 6.5. Sample Promotion File Printout

## Mailing Labels

The Selection of Function “Promotion File” , Sub-function “Print Labels” (P3) from the Main Selection Menu results in:

- The overlaying of the bottom part of the Main Selection Menu with the “PRINT PROMOTION FILE LABELS” Window (Figure 6.6)
- The positioning of the cursor at the first input field (“Which Subfile”)

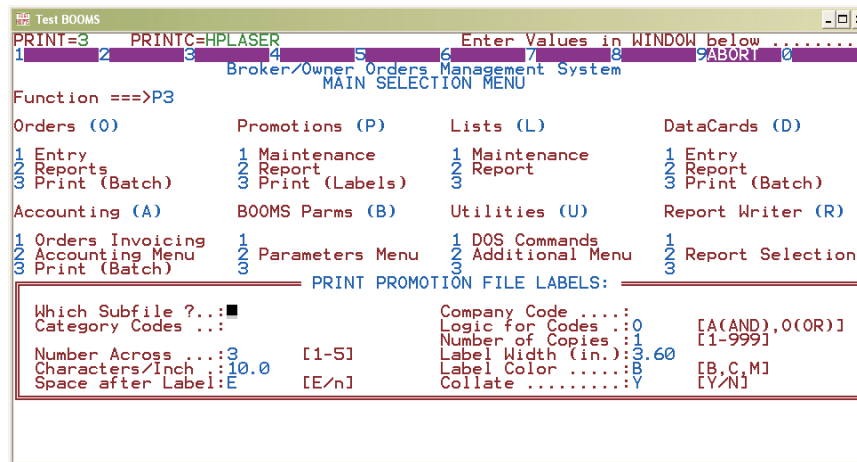


Figure 6.6. Promotion File Mailing Labels Window

Valid values for this Window are:

- **Which Subfile** - Type of the Promotion entries for which Mailing Labels are desired (i.e. B, O, M, S etc.)
- **Company Code** - Code of a specific Company for which Mailing Labels are desired
- **Category Codes** - series of 2-character codes (max 7 codes) to be used as a criteria for selecting entries from the requested subfile. If any 2-character Category Code in a Promotion File entry matches any of the codes specified here, the entry is printed. Otherwise, it is bypassed.

- **Logic for Codes** - If “O” (OR), then if a record contains any of the Category Codes specified above, then a Mailing Label is printed. If “A” (AND), then a record must contain “ALL” the category codes specified above in order to have a Mailing Label printed.
- **Number of Copies** - number from 1 to 999 indicating the number of labels to be printed for each company selected.
- **Number Across** - number of Labels (1-5) to be printed across a page (default is 3).
- **Label Width** - physical width of each Label (default is 3.6 inches).
- **Characters per Inch** - Print size required. Acceptable sizes are 10.0 (default), 12.0, and any number from 15.0 to 20.0 (compressed).
- **Label Color** - color in which Labels are to be Printed. Acceptable colors are “B” (BLACK), “C” (CYAN/BLUE), or “M” (MAGENTA/RED). The default is BLACK. If your printer does not print in color, it is possible to use this field to print in a different type style (e.g. italics). It is also possible to print in other colors by redefining the meaning of the colors (See Chapter 25).
- **Collate** - (default = Y). If collate = N is specified and you are printing multiple labels for more than 1 company, the labels will be grouped by company (e.g. 10 labels for company A followed by 10 labels for company B, etc.).
- **Space after Label** - is a value that allows you to control the number of lines between labels. A value of “E” (the default) results in an “Eject” (printer hardware “formfeed”) between labels. A number from 1 to 9 indicates a number of “blank” lines to be inserted between labels. This is most useful when printing labels on a Laser printer. For example:

To print labels on Avery “5160” Laser Labels:

**SET PRINTC(HPL5160)**

**Number Across = 3**  
**Label Width = 2.70**  
**CPI = 16.7**  
**Space after Label = 1**

To print labels on Avery “5161” Laser Labels:


**SET PRINTC(HPL5160)**

**Number Across = 2**  
**Label Width = 4.20**  
**CPI = 10.0**  
**Space after Label = 1**

To print labels on Avery “5162” Laser Labels:

**SET PRINTC(HPL5162)**

**Number Across = 2**  
**Label Width = 4.20**  
**CPI = 10.0**  
**Space after Label = 3**

 In order to ease this definition process, 3 function keys are defined to aid in printing Avery-compatible mailing labels on HP Laserjet-compatible printers. Pressing one of these keys will set the appropriate screen variables AND automatically set the correct printer characteristics (if defined).

**F5 = Set5160**  
**F6 = Set5161**  
**F7 = Set5162**

If all the defaults are chosen (3 across labels;3.6 inches wide;10 cpi), there will be no parameter conflicts. However, if Labels are to change, and you wish to respecify these parameters, note that the LABELS PRINT Program will not allow illogical specifications. A label requires room for 32 character (the number in a Company Name). The default settings allow room for approximately 34 characters. If you have a label that has a width of, say, 2.5 inches, you cannot fit 32 characters on it at 10.0 characters per inch (CPI). You will have to specify a number from 16.0 to 17.1 CPI for a label of this width. While the Labels are printing, the STATUS message is:

**nnnnn Record(s) Printed.....**

where nnnnn is the number of labels printed.