When using the Electronic (PDF) version of this document,
1) Maximize this window to Full Screen.
2) Click on the View menu and select "Fit in Window".
2) Click on the Binocular button to SEARCH for a specific topic.

Micro Florist
The Ultimate Floral Software

# Visual Ticket™

# User's Guide

**Version 8.70 – (Release: June. 2009)**
Please download the LATEST version from:
http://www.VisualTicket.com/ftp/vt_manual.pdf
(It is an Acrobat PDF document)

©Copyright 1990- 2001 – M. Cyrus Nima
All Rights Reserved.

To contact us:

support@VisualTicket.com

**Tel (1): 425-822-4690**
**Tel (2): 425-605-0558**
**Fax: 206-374-2879**

# Software License Agreement

**This is a legal agreement** between you (the LICENSEE) and Visual Ticket Corporation (the LICENSER). By opening the sealed CD package containing the software media, or taking delivery thereof, or signing the Purchase Agreement, or signing this Agreement, you are accepting and agreeing to become bound by the terms of this agreement, which includes the software license and software disclaimer or warranty (collectively the "Agreement").

This Agreement constitutes the complete Agreement between the Licensee and Licenser (the PARTIES), supersedes any previous understanding or Agreement between the Parties, and covers all actions that may arise between the Parties. If you do not agree to the terms of this Agreement and you have already received the product, do not open the disk package, promptly contact the vendor from whom you obtained the product, in order to request return approval from the vendor. Restocking charges will apply, and return of the unopened CD package and the accompanying items (including written materials, binders or other containers, and hardware, if any) will be required.

**Grant Of License.** In consideration of payment of the License fee, which is a part of the price for this product, Visual Ticket Corporation, as licenser, grants to you, the Licensee, a nonexclusive, personal non transferable, nonexclusive and perpetual license **to use** and display this copy of a Visual Ticket Corporation software program, for internal use only (The "Software") on a single computer (i.e.; with a single CPU), or on a Local Area Network (LAN) at a single location. The Licenser reserves all rights not expressly granted to the Licensee.

**Limited Warranty.** The Licenser warrants that upon receipt of the Software and for a period of 90 calendar days thereafter, the media on which the software is embedded will be free of defects in material and workmanship under normal use. The Licenser does **NOT** in any way warrant, or guarantee that

(i) the Software and related updates will be free of defects,
(ii) the Software will satisfy any of your requirements / expectations or,
(iii) the use of the Software will be uninterrupted or error free.

**Ownership of Software.** As Licensee, you own the magnetic, or other physical media on which the Software is originally or subsequently recorded or fixed, but the Licensee retains title and ownership of the Software, recorded on the original disk copy(ies)., all of the software, and all copies regardless of the form or media in or on which the original and other copies may exist. This License is not a sale of the original Software or any copy. You may not alter, de-compile, reverse engineer, disassemble, or reverse translate, or in any other way derive any source code from the Software. You may not remove or obscure Licenser's copyright and trademark notices in either hardcopy or machine readable portions of the Software and related written material (the "PRODUCT").

**Copy Restrictions.** This Software and the accompanying written material are copyrighted. Unauthorized copying of the Software, including Software that has been modified, merged, or included with other software, or of the written materials is expressly forbidden. You may be held legally responsible for any copyright infringements that is caused or encouraged by your failure to abide by the terms of this License. Subject to these restrictions, and if the Software is not copy-protected, you may make one (1) copy of the Software solely for backup purposes. You must reproduce and include the copyright notice on the backup copy.

**Use Restrictions.** As the Licensee, you may physically transfer the Software from one computer to another provided that the Software is used on only one computer, or on one Local Area Network at a time. You may not electronically transfer the Software from one computer to another over Wide Area Network, phone lines, or the Internet. You may not distribute copies of the Software or accompanying materials without the prior written consent of Licenser. Any attempt to do any of the foregoing shall be a material breach of this License Agreement, which shall immediately entitle the Licenser to exercise any remedy that may exist at law or in equity.

**Transfer Restrictions.** This Software is licensed only to you, the Licensee., and may not be transferred to anyone without the prior consent of Licenser. Any unauthorized transferee of the Software shall be bound by the terms and conditions of this Agreement. In no event may you transfer, assign, rent, lease, sell, distribute, or grant any rights to the Software or the accompanying materials on a temporary or permanent basis without the prior written consent of the Licenser.

**Custom Modifications.** Allowing any employee of Visual Ticket Corporation to perform any service is considered to be full acceptance of all the terms and conditions contained in this Agreement for the work performed.

**Termination.** This License is effective until terminated. This License will terminate automatically without notice from the Licenser, if you fail to comply with any provision of this License. Upon termination you shall return to the Licenser the accompanying materials and all copies of the Software, including modified copies if any, and **delete or remove** all copies of the Software on any computer media in your possession.

**Laws Governing Agreement.** This Agreement shall be governed by and construed in accordance with the laws of the **State of Washington, USA,** without regard to conflicts of law principles.

**Warranty Disclaimer and Limitations of Liability.** The Licenser provides the product "**AS IS**", neither the Licenser nor anyone else involved in the creation, production, delivery, or licensing of the Software or documentation make any warranty or representation of any kind, express or implied, with respect to the Software or the documentation, or its quality, reliability, it's features, title, performance, or its merchantability or fitness for particular use or purpose. The Licensee assumes the responsibility to verify the correctness and accuracy of all products and services provided by Licenser to the Licensee. The Licenser is NOT responsible for any client data or costs associated with maintaining or restoring said data, no liability for consequential damages, in no event shall the Licenser or its suppliers or distributors be liable for any direct, indirect, special, incidental or consequential damages whatsoever however caused or on any theory of liability (including, without limitation, damages for loss of business profits, business interruptions, loss of business information, or other pecuniary loss) arising out of the use or inability to use the Software, even if the Licenser has been advised of the possibility of such damages. Because some states do not allow the exclusion of limitation of liability for consequential or incidental damages, the above limitation may not apply to you. This limitation is intended to limit the liability of the Licenser and shall apply not withstanding any failure or essential purpose of any limited remedy.

**Implementation.** All the necessary computer hardware, network, printers, and cables need to be provided by you (the Licensee), and be installed by a fully trained, certified, and experienced Computer Technician hired locally by the Licensee. It is hereby understood that the selection, and the operation, of the hardware, hardware upgrades, the operating system, and the Local (or Wide) Area Network is the responsibility. of the Licensee.

**Limitation of Remedies.** The Licenser's entire liability and your exclusive remedy shall be, at Licenser's option, either

a) return of the price paid within ten (10) days if the seal on the Software media is unbroken or
b) termination of the License Agreement, as described in the License Agreement.

**Claims Resolution.** Any controversies, actions, or claims arising out of, or relating to, this Agreement, or the making, performance, or interpretation thereof, shall be settled by arbitration in **King County, Washington**, in accordance with rules of the American Arbitration Association then existing, and judgment on the arbitration award maybe entered in any court having jurisdiction over the subject matter of the controversy.

**Attorney's Fees and Costs.** If any action at law or in equity is necessary to enforce or interpret the terms of this Agreement, the prevailing party shall be entitled to reasonable attorney's fees, costs, interest, and necessary disbursements in addition to any other relief to which he/she may be entitled.

**Partial Validity.** If any of this Agreement is held by a court of competent jurisdiction to be invalid, void, or unenforceable, the remaining provisions shall nevertheless continue in full force without being impaired or invalidated in any manner.

**Notification or Waiver.** This Agreement is not to be amended, except after the date hereof by an instrument in writing signed by all the parties, and no amendment, modification, termination, or waiver shall be binding unless in writing and signed by the party against whom the amendment, modification, termination or waiver is sought to be enforced. No waiver of any provisions of this Agreement shall be deemed, or shall constitute, a waiver of any other provisions, whether or not similar, nor shall any waiver constitute a continuing waiver.

**Confidentiality.** The Software contains confidential trade secret information belonging to the Licenser and you may use the Software **only** pursuant to the license set forth herein. In addition, you may not disclose the Software to any third party.

The Shop Management Series software and Shop Management Series User Manual are the sole property of Visual Ticket Corporation. Reproduction of any kind without prior written consent is strictly prohibited.

Copyright c 1989/1990/1991/1993/1995/1997/2001 All rights reserved.

# Table of Contents


User's Guide ____ i
Software License Agreement ____ ii
Table of Contents ____ iii
Chapter 1 ____ xv
Visual Ticket Essentials ____ xv
System Overview ____ xv
Where is the data stored ? ____ xv
It is a Tale of 2 Databases ____ xv
The Wall between Databases ____ xv
Order Pad Database ____ xvi
Posted Database ____ xvi
The Processing Agent ____ xvi
Back-Link to "Posted Sales" ____ xvi
What does The Micro Florist do ? ____ xvii
Visual Ticket Agents ____ xvii
What are Agents ? ____ xvii
Interfacing Agents ____ xviii
Order Processing Agents ____ xviii
System Agents ____ xviii
Who's in charge ? ____ xviii
The System Manager ____ xviii
Financial Manager / Supervisor ____ xix
Technical Support ____ xix
Startup Support (VAR Support) ____ xix
On-Site Installation & Training ____ xix
Startup Phone Support ____ xix
Maintenance Support (VT Support) ____ xix
Sign-up for Support ____ xix
Paid Services ____ xx
Technical Support Backup ____ xx
Opting out of Support ____ xx
At least Once a Year ____ xx
Cost of updates ____ xx
When to Signup ? ____ xx
Chapter 2 ____ 23
The Road Map ____ 23
Running Visual Ticket ____ 23
Is the Network Ready ? ____ 23
Quick Setup ____ 23
The "Tulip Screen" ____ 23
File Maintenance ____ 23
Connections ____ 23
Hardlock and UUV ____ 23
Month-End Routines ____ 23
Login ____ 24
Agent Launcher ____ 24
Business Parameters ____ 24
Sales Tax ____ 24
GST (Canada) ____ 24
Service Charge on Wireout orders ____ 24
Delivery Charge on Wireout orders ____ 24
Division Names ____ 25
Test Orders ____ 25
Watch the Movies ____ 25
Enter orders ____ 25
Deleting Practice Orders ____ 25
Deleting Posted Orders ____ 25
Fine Tuning the System Setup ____ 25
Going Live ____ 26
The Adjustment Period ____ 27
Check Lists ____ 28
Turning System On ____ 28
Turning System Off ____ 28
Chapter 3 ____ 29
Order Entry ____ 29
Overview ____ 29
Order Pad Display ____ 29
Windows Desktop Area ____ 29
Placing Forms on the screen ____ 29
Entering a new order ____ 29
Main Order Pad ____ 30
Achieving Perfection ____ 30
Tab Sequence ____ 30
Cut & Paste ____ 30
Shortcuts for Fast Entry ____ 30
Special Considerations ____ 31
Order Entry Skills ____ 31
Enforcing your Rules ____ 31
Quick Cash Order Pad ____ 32
The Order Pad ____ 32
Special Features ____ 32
Mastering the QuickCash ____ 32
QuickCash Automation (QCA) ____ 33
QCA in Payment form ____ 33
Order Pad Windows ____ 34
The Combined Form ____ 34
Wire-out ____ 34
Wire-in ____ 35
Shortcuts ____ 35
Submitted/Processed Orders ____ 35
Button Icons & Shortcuts ____ 35
The Prep Form ____ 35
Item Selection ____ 35
The Picture ____ 36
The Card Form ____ 36
The Picture ____ 37
ACRONYMS to the rescue! ____ 37

The Delivery Form 37
The Wire-out Form 39
The Wire-in Form 39
REC and INC Messages 39
Multi-Line Item Wire-In sales 39
The Payment Form 40
Drawer and Printing 40
The Change amount 40
Customer Balance & Credit Limit 40
Credit Card Payments 40
Credit Card Type Dropdown 41
Instant Approval 41
The CVV code 41
Now or Later? 41
Making Zip Code Mandatory 41
Where to begin ? (tab sequence) 42
What to do, what to do??! 42
Account Sales 42
Sent it via email 42
The Other Info Form 43
Division No. 43
Changing the Station No. 43
Allocation Account 43
Print Request 43
Account Sales 44
Account Sale with Caller-Id 44
Account Sale with the Account Dropdown box 44
Account Sale - w/Large Customer Database 45
Account_Id is NOT known 45
Account_Id is known 45
Additional tips on Account Sales 45
Personalized Service 45
Reseller Certifications 45
Default Customer Account 45
The Alternate Top Of File Account 46
How to over-ride system protections: 46
The Billing Option 46
The Browser Utility 46
Color Coded Order Status 47
Locating Orders 47
Locate by Sorting 47
Locate by Selecting 47
Where is Home?! 47
What is Master_Id ? 47
Moving around.. 48
Going to an order 48
The Auto-Update Mode 48
**Repeating Orders 48**
Repeat using Copy button 48
Copy for Repeat or Refund ? 48
Repeat with Line Item option 49
Repeat Posted Sale 49
Repeat Templates 49
Repeat Recipient 50
Recipients in VT 50
Recipients in MFS 50
**Station vs. Default Tax Rates 50**
Chapter 4 51
**Order Management 51**
**Order Status 51**
Life Cycle of an order 51
Processing Parameters 51
Standby Parameter 51
Archive Parameter 52
Purge Parameter 52
Standing Order Lead Time 52
Auto-Submit Orders 52
Halt Processing 53
Status Conversions 53
Voided vs. Reversed 53
When to Void or Reverse ? 53
Voiding and AIM 54
Status Conversions (Cont.) 54
Crediting a Credit Card Sales 54
Canceling a Wire-In order 55
Time Stamps 55
Over-written Orders 55
The History Button 55
Flags 55
Attention Flag 55
Resetting Time Stamp 56
[ ON-HOLD] order status. 56
Audit Flag 56
Line Item Serial No. 57
Reassigning the Line numbers 57
**Pre-Printing Production Tickets 57**
Via the Print Agent (regardless of Order Status) 57
From the Report Launcher 58
**Handling COD Orders 58**
COD By Billing 58
COD By Payment 58
Balance Utility Considerations 59
**Handling Wire Orders 59**
Wire-Out Processing Center 59
Changing the Amount Given 60
Auto-Select 60
Shop Assignment 60
Directory Lookup (Shop Search) 60
Browse the Directory 61
Preferred / Blocked Shops 61
Editing the Directory 61
Search by Product Codifications 61
Calling out the order 61
Mercury Direct / Dove Transmissions 62
Modify Florist Info. 62
Wire System Sequence Tracking 62

Managing Divisions 63
The Select Menu 63
Auto-Update (Timer) 63
Specifying Default Selections 63
VT Networking Services 64
Florist Direct tm 64
It's a Paid Service 64
Find a VTN Florist 64
It is for Internal Use 64
VT Net Setup 65
Using Florist Direct 65
Bid or Final ? 65
Emailing the order 66
Faxing the order 66
**Order Pad Status Review 67**
A perfect day ?! 67
Order Pad Status 67
Tracking orders in the Browser 67
Access Level Requirements 67
Before Server Shutdown 68
Auto-Update (Timer) 68
Delivery & Production Status 69
**Standing Orders 69**
Order Templates 69
Custom Print Requests 69
Add/ Remove Print Requests 70
Standing Order Schedule 70
Auto-Repeat of Standing Orders 70
Standing Orders Schedule 70
Standing Order Creation 70
Standing Orders Lead Time 71
Standing Orders Schedule 71
Global Status Changes 71
Remove all Attention Flags 71
Auto-Submit all qualifying orders 71
Remove all Print Requests 71
Delivery Pools 71
Visual Pool Ticket 72
Using pre-printed Pool Tickets 72
**Canadian Taxes 72**
Local Orders 72
Wire orders 72
Canadian, Aye? 72
Exchange Rates 73
Implementation 73
Cash-Outs 73
Recording the Drawer Open Action 74
Cash-Out and the Balance Utility 74
Cash-Out and the AIM 74
Changing Expense Groups/Categories 74
Quick Setup 74
Detailed Setup 74
Voiding Cash-Out Transactions 75
**Credit Card Security 75**
Credit Card Info. & Customer Consent 75
No Credit Card Info on file 75
Account Sales 75
Customer Profile 75
Customer Defaults 75
General Sales / QuickCash 75
Maximum Credit Card Security 75
Erasing ALL Credit Card Information 76
Credit Card Agent 76
Voids / Refunds 76
Handling Order Fragments 76
Chapter 5 77
**Balancing and Reports 77**
Overview 77
What is a Session 77
**The Balance Utility 77**
It's a Balancing Act 77
Where are my numbers ? 77
Balancing Separately 78
Balance another session 78
Central Balancing 78
Employee Access Levels 78
Step By Step Balancing 78
Retrieving the information 78
Include GL ? 78
Update figures 79
The Count Cash Utility 79
Printing the Check Deposit Slip 79
Resolve Discrepancies 79
The Reconcile Utility 79
Transfer Amounts 80
Rotating Balances 80
Transferring Out Funds 80
The Z-Report (order pad) 81
Exporting Z-Report Data 81
Emailing the Z-Report 81
**Reports 82**
Which Printer ? 82
**Catalog Reports 82**
Your Inputs 82
**The Report Launcher 83**
Reports vs. Listings 83
Report Output 83
Report Filtering 83
Sales Reports (Order Pad Database) 84
Select Utility 84
Additional Filtering 85
Mercury, Dove or Bloomlink? 85
Planning Reports 85
Planning and Production Status 85

MRP Report #5 86
Posted Reports 86
Posted Sales Report 86
The Selection Utility 87
Wire-In and Wire outs 87
Automatic 87
Using the Filter Form 87
Teleflora Wire-Outs 87
Teleflora Wire-ins 87
Other Scenarios 87
Report Contents 88
Posted Deliveries Reports 88
Posted Daily Sales Report 88
Posted Payment Report 88
Posted Deliveries Reports 89
Reconciling Report Contents 89
Trouble Shooting Reports 89
Customized Reports 89
**Module Specific Reports 90**
Balance Utility 90
Customer History 90
The eManager 90
Accounting Interface Module (AIM) 90
Power Module Reports 90
Snapshot (+Print) Button 90
**Save / Send Toolbar 91**
Output (Save) Options 91
How to ? 92
Applications 92
Emailing Reports 92
**Micro Florist Reports 93**
Cash Register Menu 93
Sales Information 93
Transactions Menu 93
Financials Menu 93
Services Menu 93
Wire Service Reports 94
Occasions Reminder Reports 94
Customer Management Reports 94
Employee Reports 94
Chapter 6 95
**Order Tracking 95**
**Overview 95**
Production Tracking 95
The Default Sorting 96
The Procedure 96
Changing Due Dates 97
Planning Reports 97
Recipe Production 98
Entering Production Mode 98
Updating the Recipe with Qty Used 98
Recipe Reports for Production 98
Pickup Orders Tracking 98
Delivery Tracking 99
The Procedure 99
Flora-Map 99
The Delivery Manifest 100
Sorting Options 100
Making Deliveries 100
Back to the shop 100
Filter for specific Delivery Zones 101
Delivery Confirmations emails 101
Batch Mode Automation 102
The Rush Button 102
SQL Select Troubleshooting (Re-Index) 103
Using Delivery Zones as Map Coordinates 103
Enforcing Dependencies 104
**Flora-Map 104**
Automated Interface 104
Mapping Engine Defaults 104
Using Flora-Map 105
The Point File 105
Mapping Procedure 105
Mapping Engines 106
MapPoint 106
Streets and Trips 106
Street Wizard 106
Street Wizard Installation 106
**Problem Tracking 107**
Procedure 107
Purging Orphan Problem Folders 107
**Using Barcode 107**
Barcode Manager 107
Barcode Printing 107
Choosing the Font Size 107
Scanning Existing Barcodes 108
Barcode Interface 109
Scanning Barcodes 109
Barcode Automation 109
Sample Barcode Automation Sheet 110
Increasing Automation 110
Chapter 7 111
**Search Engine 111**
**Overview 111**
Visual Search Engine (VSE) 111
Fuzzy Search Technology 111
The Filter Utility 113
The Operators 113
View the Current Values for each field 113
Adding the second criteria 113
Universal Excel Output 113
Setting Flags 113
Direct Access 114

Chapter 8 115
Customers 115
Customer Profile 115
Adding a customer 115
Deleting Customers 115
Editing Customers 115
Adding Customer Photo 116
Customer Setup Form 116
Sales Tax (or GST) Exempt 116
The Alternate Customer Id 117
Setup Initial Balances 117
Balance Adjustor (PM #9) 117
Sorting / Filtering Customers 118
Setting up Customer Initial Balances 118
Voiding Balance Adjustments 118
The Micro Florist Option 119
Adding Customer with existing balances 119
Adding the Customer 119
Posting Initial balances 119
Verify Initial Balances 120
Entering Payments 120
Sent it via email 120
Past Payments 121
Void Payments (in Visual Ticket) 121
Void / Modify Payments (in Micro Florist) 121
Void Payment Transaction 121
Modify Payment Transaction 121
Customer History 121
Customer History Report 121
Invoice Tracking 121
Changing the Printer 122
Customer Aged Balances 122
Saving Archived copies 122
Printing the Archived copies 122
Global Invoice Tracking 122
Posted Sales 122
Posted Sales Browser 123
Posted Sales Filter Utility 123
Search for Invoice# 123
Browsing Details 123
Rapid Succession Deletions 123
Accessing the Order (in the Order Pad) 123
Printing Hardcopy of Posted Sales 124
Quick Lookup Windows 124
Delivery Tickets 124
Payments 124
Customer Status Window 124
Accessing Posted Transactions Directly 124
Posted Sales (in time) 124
From the Order Pad 124
Posted Payments / Balance Adjustments (in time) 125
Accessing orders in the Order Pad 125
Customer History in Micro Florist 125
Special Occasions 125
Customer Types / Defaults 125
The “Do Not Use” customer 126
Visual Billing Module (VBM) 127
Billing Sessions 127
Selection Criteria 127
Customer Type Codes 127
Balance Range 128
Division Filtering 128
Account_Id Filtering 128
Filter Utility 128
Billing Options 128
Accessing the Customer Profile 129
Who’s is Billed ? 129
Build for a specific customer 130
Customer Aging 130
Aging prior to Build 130
Other Tools 130
Fine Tune the output 130
Forms and Templates 130
Using the Billing Module 131
After the BUILD 131
Confirmation Invoices 132
Billing Setup 132
Invoice_No, Aging, & Late Messages Setup 132
Billing via the eManager 133
Operation 137
eMail Template 137
Keeping copies on-file 137
Other Customer Specific Modules 138
Power Module #2 138
All the items purchased by this Customer 138
Power Modules:9 &10 138
Account Changer / Merger (PM #10) 138
Voiding Finance Charges 139
Chapter 9 141
Inventory 141
Inventory Profile 141
Standard Inventory Items 141
Service Items 141
Wireout Items 141
Selecting (Searching for) items 142
The Barcode Field 142
Keywords 142
Sales Tax and GST 142
Cashier Notes / Adjusted Price 142
Item Specifications 142
Global Item Counter (GIC) 142
Inventory Setup 143
Adding Standard Inventory 143
Adding Service Items 144
Pricing Labels 144

Inventory Recipes 145
The Recipe List 145
Recipe Items 145
Price vs. Qty Comparisons 145
Price Comparisons 145
Qty Comparisons 145
Printing the Recipe List 145
Inventory Reduction 145
Implementation 146
Deciding the contents of the Recipe List 146
Updating the Recipe List 146
Work Ticket w/Recipe List 146
Recipes in Production Mode 146
Recipes in Event Worksheet 146
Material Usage Report 147
From the Report Launcher 147
From Production Tracking 147
From Event Worksheet 147
The Cumulative List 147
Resetting the Counts 147
Reorganize the Inventory 148
Power Module #1 148
Change/Merge a Single Item_Id 148
Change/Merge Group of Item_Ids 148
Let's Reorganize ! (the Procedure) 148
Power Module #2 149
Who bought Item x ? 149
Quantity Check Window 150
Price Check Window 150
Line Item Discounts 150

Chapter 10 151

**Employees 151**

**Employee Setup 151**

Mid-session Login 151
Forced Login 152
Close Your Session!! 152

**Punch In / Punch Out 153**

Modify/Remove (adjust) Punch-Ins 153
Add/Modify/Delete Time Entries 153
Time Overlaps 154
Sorting and Verifying 154
Previous Weeks 154
Submit the entries 154
Payroll Settings 154
Daily Over Time 154
Start of Payroll Week. 154
Time Sheet Reports 155
In Visual Ticket 155
In Micro Florist 155

**Messaging System 155**

To send a message 155
To Receive a message 155
The Prompter 155
The Prompter Setup 156
Employee Performance Evaluations 157
Power Module #3 157
Employee Sales Performance Measurement 157
Power Module #4 157
Production Performance Measurement 157
Power Module #5 157
Driver Performance Measurement 157
The Data Source for PM 4 and 5 158

Chapter 11 159

**Wire Services 159**

**Overview 159**

Wire Service Setup 159
Wire Service Setup in VT 159
Add a Wire Service 159
Auto Distribute 159
Auto-Select 159
Auto-Select Force Mode 160
Wire Service Accounts 161
Wire Services Setup in Setup Manager 161
Wire Service Accounts in Micro Florist 161

**It is about Reporting 162**

Automatic Reporting 162
REC / INC Message Transmissions 162
REC / INC Setup 162
Schedule INC/REC 162
Managing REC/INC messages 162
Period Reports 163

**Wire Service Reconcilement 163**

Modifying the Posted Order 164
The Auto-Reconcile 164
Reconcile in Micro Florist 164
Finishing up 165
BloomNet Xml Interface 165
Printing Options 166
Timed Out Rejects 166
Handling Rejected orders 166
It's a Paid Service 166
Auto-Print on BloomNet Website 166

Chapter 12 167

**Marketing / Customer Service 167**

Using Sales Reference Number 167
Gift Certificates 167
Marketing Points 167
Implementation 167

**Personalized Enclosure Cards 168**

Implementation 168
eMail Account Setup 168
Print Job Setup 169

**The eManager** 169
eManager Setup 170
Customer Defaults 170
Customer Setup 170
Your Email Account 170
Does your ISP block your Mass Emails ? 171
Email Template Editor 171
eManager Operations 172
Interactive eManager Session 172
Changing "SENT" status globally 172
File Attachments 173
Stored Messages 173
Marketing Promotions 173
Invoice by Email 173
Occasion Reminder Email 173
Doing a Build 174
Transmit 174
Filtering Customers 174
Automatic eManager Sessions 174
Via the Nightly Agent 174
Via the VOX Agent 175
Applications 175
The VOX Express 175
Implementation 175
eManager Maintenance 175
Reports 175
Archived eMails 175
eManager File Attachments 175
Sending HTML eMails 176
What is HTML ? 176
How does it work ? 176
How to implement HTML ? 176
Your Shop's Logo 176
Pictures of Products 176
Features to facilitate HTML 176
Should you do it ? 177
Direct & Immediate emails 177
**Mail Merge** 178
Power Module #6 178
Overview 178
Mail Merge Templates 178
Loading the Latest Templates 178
Data Source 179
Choosing the Data Source 179
Using the Customer Database 179
Choosing between two dates 179
Using Occasions Reminder 179
Data Fields 180
Customer Database Fields 180
Occasions Reminder Fields 180
Recipient Database Fields 180
Using the Recipient Database 181
Grouping to Reduce List 181
Filtering 181
Browse / Modify / Excel 181
Mail Merge Procedure 181
Customer VIP Cards 182
**Advertisement Tracking (AT)** 182
Assigning AT Codes 182
AT Names / Report 182
Changing AT Names 182
Choosing Sale Types 182
Printing AT Sales Details 183
**Occasions Reminder** 183
Overview 183
Implementation 183
How to get the data ? 183
Ask the customer 183
Data Mining 184
Using the Occasions Reminder 184
Mention it 184
Send a Post Card 184
Send an email 184
**The Sender List** 185
For Thank You Notes 185
Power Module # 11 185
Your Options 185
Chapter 13 187
**Orders Transfers (VOX)** 187
VOX Operations 187
VOX between Main/Branch shops 187
Dial Up Automation 188
Dial on Demand 188
Resource Files 188
Completion Criteria 189
Encryption 189
VOX rules on the HOST 190
VOX rules on Remote Stations 190
Processing rules on the HOST 191
Can't Find that Customers ? 191
VOX Stamps 192
View Pending VOX Orders 192
**Orders From Website** 193
Occasion Reminders 193
**Running eManager Sessions** 193
VOX Setup 193
Chapter 14 195
**The Event Worksheet ™** 195
Overview 195
Setting up Events 195
The Events Report 195
System Components 195
Interface Features 197

Customer Database 197
Navigation (selecting worksheets) 197
Color Picker Utility 197
Inventory Database 197
Item Specifications 197
The Spell Checker 197
Frequently Used Addresses 197
Creating a Visual Ticket Order 197
Event Worksheet - Events Listing 198
How to handle Deposits 198
Customer Account Connection 199
Customer's Current Account Balance. 199
Amount Not Yet Covered 199
The Payment button 199
Item Recipes 199
Each Item's Recipe 199
Building the Recipes 199
The Combined Material Usage List 199
Printing Worksheets 200
Pictures ONLY Addendum 200
Single Enlarged Pictures 200

Chapter 15 201

**Accounting Interface (AIM) 201**
Accounting Interface Module (AIM) 201
What it does 201
**AIM Components 201**
Calculated Fields 201
The Build Process 202
Output Files 202
XLS & XML File output 202
Excel Output A & B 202
XML file Output 202
XML file Upload 202
Automatic XML Upload Setup 203
IIF Output 203
AIM Automation 204
Data Extraction 204
**AIM – Level2 205**
Dynamic Link 205
Automating Payroll 205
QuickBooks Pro Preferences 205
**How it works 206**
Division Filtering 207
GL Transactions 207
The Build Process 207
Figures from The Balance Utility 208
A.I.M. Setup 208
AIM Level-1 209
AIM Level-2 209
Server Shutdown 210
Server Shutdown - Running AIM - Level -2 210
Setup Parameters 210
COGS% vs. Ave. Cost 211
**QuickBooks Interface 212**
The Road Map 212
What is an IIF ? 212
Chart of Accounts 213
Designing your IIF 213
Testing the IIF 215
Recreating IIF for past data 215
Balancing the IIF 215
IIF Out-Of-Balance ? 216
Verifications 216

Chapter 16 217

**Planning 217**
**Overview 217**
Planning (for Material Requirements) 217
Resource Planning 217
Revenue Goals 218
**Visual Charts (Power Module #7) 218**
Customers & Deliveries 218
How to use the Chart Module 219
Sales Terns / Load Analysis 219
Sales Trends 220
Load Analysis 220
5 or 10 Year Performance 220
**The Chart Agent 221**
Chart Agent Operations 222
Stacked vs. Non-Stacked 222
The First Chart 222
The Second Chart 222
The Third Chart 222

Chapter -17 223

**System Manager 223**
Overview 223
**Downloading updates 223**
Visual Ticket News 223
Security Considerations 223
**Paid Services Options 224**
Credit Card Processing Options 224
Instant Approval options 224
Current Status of Gateways 225
USAePay Gateway 225
iTransact Gateway 225
Lynk Systems 225
Card Present Transactions: 226
**User Defined Templates / Reports 226**
"Custom" User Defined Templates 227
Programming Keyboards 227
A QuickCash Automation Application 227
Micro Florist from ANY station. 228

**Routine Maintenance Tasks** 228
External Backup 228
Windows Maintenance 228
Visual Ticket Cleanup 228
System Supervision 229
Server Shutdown 229
Tracking orders in the Browser 229
Changing/Adding Printers 229
Orphan Orders 229
Universal Excel Output. 230
Archiving Posted Transactions 230

Appendix -1 231

**Getting Connected** 231
Hardware Requirements 231
**Mapping Network Resources** 231
Sharing Disk Drives 231
Sharing Printers 231
**Installing the CD** 232
Terminal Service Installation 232
**UUV Installation** 233
Hardlock Key 233
Installing System Configuration 233
Selecting the Station No. 234
Password Protection 234
**Local Connections** 234
VT Data Directory 234
MFS Server Directory 235
MFS Host Directory 235
Locking Drive Connections 235
Startup Action 235
Backdrop Picture 235
Multi-Media Players 236
**Automatic Start-up** 236
Bypassing normal Log-in 236
Auto-Startup of Visual Ticket 236
Windows XP 236
Windows Vista 236
Copy Shortcut 236
**Print Setup** 237
Blank Paper Printer 237
Cash Drawer 237
Print Spooler Limit 237
Pushing it to the limit 237
Print Job Utilities 237
Reset all Printer Names 237
Check All Printer Assignments: 237
Reset Printer Attributes 237
Capture Printer Port: 238
Setup Print Jobs 238
Direct Printing 238
Central Printing 238
Basic Format 239
Printer Control Files 239
Visual Format 240
Fine Tuning Print Jobs 240
Division specific Print Jobs 240
Printing tickets for Processed Orders only? 240
Prompt the User to select a printer 240
Generic Output 240
Hardcopy of all orders 241
Hardcopy Before Save 241
Hardcopy via the Print Agent 241
The Re-Print Label 241
Which Combined Ticket ? 241
The “Basic Format” version 242
The Visual Format version 242
HardCopy Alert for Incoming orders 243
Setup HardCopy Alerts 243
How it works? 243
Local versus Central Printing 243
HardCopy Alert Print Request 243
Thermal Printers 244
Adding Logo To your Receipts 244
Thermal Printers and The Basic Format 244
Enclosure Card Font 245

Appendix -2 247

**Accessories** 247
Instant Approval Setup 247
Using Instant Approval 247
Flora-Credit Server (using ICVerify) 247
Installing ICVerify 247
How does it work ? 248
Setup ICMulti 248
Setting up the Flora-Credit Server 248
Number of Users 248
Installing Mercury Interface 249
Mercury Direct Interface Agent 249
Setting Print Job 249
Get the Password 249
Mercury Direct on ALL stations? 250
Multi-Shop operations 250
Sending Delivery Confirmation (ANS) 250
Managing Delivery Confirmation (ANS) Messages 250
The Alternate Mercury Agent 250
Installing the Dove Agent 251
Incoming Dove files 251
Installing Bloomlink Agent 251
Incoming Bloomlink Files 251
Tracking Imported BL Orders 252
Setting up the Agent 252
Wire-In Reporting 252
Bloomlink Direct Pay 252
The Caller-Id Manager 253

Installing the Caller-Id Manager 253
Running the Caller-ID Manager 253
The Caller-Id Interface 254
The Auto-Dialer Interface 254
The Auto-Fax Interface 254
Florist Directory Extensions 254

Appendix -3 255

**System Setup 255**

**VT Setup Levels 255**

Local Connections 255
Global Parameter 255
Session Defaults 255
Agents Setup 255

**The Setup Manager 255**

Delivery Zones / Frequent Addresses 256
Display an "Address" indicator 256
Delivery Services Setup 256
Canadian Delivery Zones 256
Environment Setup 257
The Master Password 257
The Manager Password 257
Bypass Password Checking 257
Deletion Control Password 257
Lock System Monitor on Startup 257
Enforce Dependencies 257
Global Item Counter 257
File Maintenance Schedule 257
Delete Orphan Problem Folders 257
REC / INC Message Transmissions 258
Drop Down Boxes 258
Caller-Id Log file 258

**Session Defaults 258**

Defaults Tab 259
Order Entry Defaults 259
Division Name/Address 259
Invoice Defaults 259
Order Entry Tab 259
Order Pad Scope 259
Order Entry Options 259
Status Button mandatory ? 259
Wire Button mandatory ? 259
Other Info mandatory ? 260
Recipient Address mandatory? 260
Sender's Name mandatory ? 260
Start with Account Sale ? 260
Display the Summary Screen ? 260
Print Request Defaults 261
Customize Order Entry 261
Hardcopy of all Orders 261
Automatic Division Assignment 261
Choice_2 Append Function 261
Making Zip Code Mandatory 262
Where to begin ? (tab sequence) 262
Credit Card Type Dropdown 262
Enable Barcode Interface ? 262
Enable Price Checking ? 262
Enable Quantity Checking ? 262
Enable Auto-Zip code Insertion ? 263
Enable Staff_Id / Sold Division changes ? 263
QuickCash Automation 263
Cash Drawer Mode 264
System Tab 264
Data Entry Field Colors 264
Skins and Themes 264
Novice vs. Expert modes 264
Set Confirmation On ? 265
Bypass "Are You Sure" ? 265
Disabling Dropdown Controls 265
Background Save 266

**Adding Pictures (image files) 267**

Enlarging and Printing 268
Enlarging Pictures 268
Printing Pictures 268
A Sample Application: 268

Appendix -4 269

**Agents Setup 269**

**Overview 269**

Running Agents 269
Menu vs. Background 269
Session Specific Access 269
Prevent the Automatic Closing of Agents 270
The Monitor Agent 270
Monitor Agent Timer 270
Add/Modify Sessions 270
Access Levels 270
Central Control 271
Verification Tab 271
Locking the Monitor Agent 271
The Process Agent 271
The Daily Agent 272
Chart Agent 272
The Credit Card Agent 272
The Caller-Id Agent 272
The Mercury Agent 273
Running it overnight 273
The Dove Agent 273
The Bloomlink Agent 273
The Nightly Agent 274
Nightly Backups 274
Support Bulletin / Announcement 275
Saving Archive Copies of Aged Balances 275
The Cleanup Utility 275
The Internet Agent 275
The VOX Agent 276

The Print Agent 276
Printer Errors 276
The Timer Delay option 276
The Agent Monitor 277
Issue warnings over-night 277
Reporting status of the System Monitor Agent 277
Reporting status of Agent running on Stations 277
Verifying Agent Monitor Operations 277

Appendix -5 279

**Micro Florist 279**

**Overview 279**

Self Guided Tour (SGT) 279

**Micro Florist Setup 280**

Printer Setup 280
PCL5 Compliant Printer 280
Local vs. Network Printing 280
Capturing LPT port 280
With a little help from your Friend 280
Printer Auto-Switching 281
Printer Brand Selections 281
Adjusting the Font Size 281
Adjusting the Page Size 281
Personalizing the Micro Florist 281
Micro Florist Screen Size 281
Customizing Micro Florist 281

**Search Engine 282**

Practice Session 282
Adding Employees 282
Access Levels in Micro Florist 282
Activate Password Protection 283
Delivery Service Setup 283
MFS Balance Utility 283

Appendix -6 285

**Trouble Shooting 285**

Overview 285

**File Maintenance (FM) 285**

VT Server FM 285
Station Level FM 285
Micro Florist FM 285
VT Issues an Error 286

**Recovering from Windows Crash 287**

Can not access File (or file does not exist) 287
File Access is Denied 287

**Damaged Data Files 288**

Memo File is unusable (or missing) 288
Recovering From Backup 288
Automatic Backup Recovery 288
Manual Backup Recovery 288

INDEX 289

# NOTES

# Chapter 1

**Recommended read for:**

1) System Manager
2) Manager

## Visual Ticket Essentials

**Welcome** to Visual Ticket. In this chapter we will discuss the basics of Visual Ticket and things you need to know before you attempt to use the system.

### System Overview

Visual Ticket (VT) is a Point of Sale / Order Management system that is specifically designed for Retail Florist, Gift Basket, and Mail Order businesses. Visual Ticket is a "Database Application" that provides you with the means to capture data, storing it in various (database) files and then by processing that data, it helps you retrieve "useful information" to better manage your business.

### Where is the data stored ?

Before we talk about clicking this or clicking that, lets talk about some of concepts here.

#### It is a Tale of 2 Databases

The data stored in various files actually reside in 2 different File Cabinets (ie Databases). Namely;

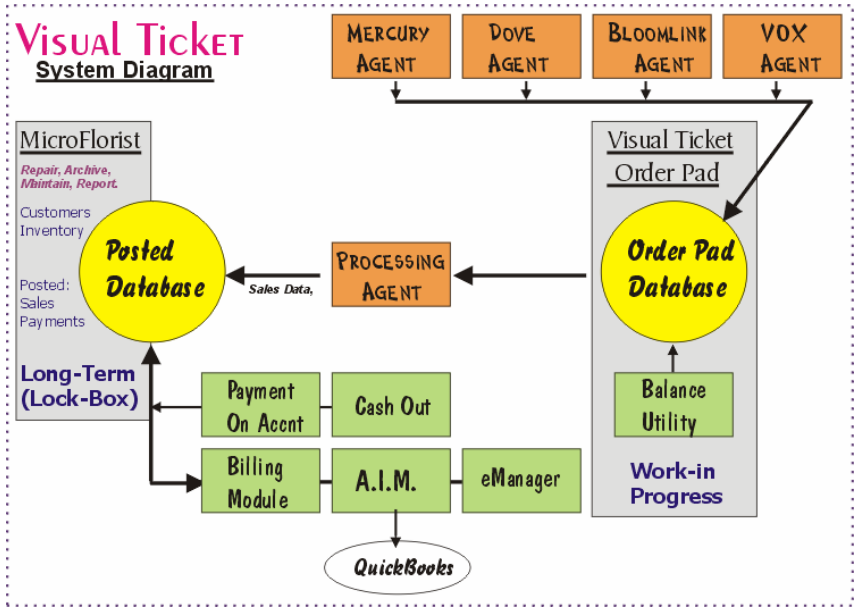
- Order Pad Database
- Posted Database

Opening the VT order pad, simultaneously opens about 50 files that belong to the Order Pad Database (located on the VT Server, which is a good reason to always close the Order Pad, when not in use). While the "Posted Sales" report, or the Billing module, open about 20 files that are part of the Posted (long term) Database.

#### The Wall between Databases

There are good reasons for the separation of the two databases. Including;

In case of damage and file corruptions, the two separate set of files provide a higher level of security and redundancy. To a point where, one set maybe used to compensate for the other (for example, by posting processed sales in the Order




Pad again, we can replace the damaged records in Posted Database).

- Provides for automatic Archiving and Recycling of your Order Pad files (the work-in-progress area), by purging "Processed" (Posted) orders after few weeks have passed since the information was transferred to Posted Database.
- The Posted database is packed and maintained with a level of details that is suited for the long haul of at least a few years (after which they too maybe archived and purged, if/when the time comes).

In the above diagram, the two databases are shown in yellow circles. The yellow circle on the right represents the Order Pad Database, where you perform most of your "Shop Operations" by sending/receiving orders from external sources, order entry by Cashiers, filling orders, tracking orders, and finally balancing your drawer(s) at the of the day.

While the yellow circle on the left holds your (long term) Posted Database records in a lockbox, sort to speak where General Ledger Transactions, Billing, and Accounting functions take place. This is because the information contained in Posted Database is somewhat "Final". Even though the system still allows you to delete/modify (some) posted information (when and if necessary), but the process is not as accessible as it is with the Order Pad data.

### Order Pad Database

This is the set of files that store your entire Order Pad information (Located on VT Server). It contains all the orders that popup when you open the Order Pad. We like to refer to this as your "Work-in-Progress" area where orders come in and go out, order status change rapidly, and things are quite fluid and dynamic. The database contains "future" orders, "not yet paid" orders, orders with "Attention flags", orders pending wire transmissions, as well as of course submitted, processed and archived orders.

As an example, since the Balance Utility must take into account all sales activity for a given day, regardless of whether they were posted or not, it operates on the "Order Pad" database.

You can see the details of sales in the Order Pad Database, by running one of the reports that start with "Order Pad Sales…" in the Report Launcher. The Z-Report on the Balance Utility summarizes the information (so it also uses Order Pad Database).

### Posted Database

The "Posted" database, on the other hand, holds what we like to refer to as your "Realized Revenue" (sales that were buttoned up, signed, sealed and delivered). This is because only Due and Paid orders that have been Transmitted, Delivered, and Submitted (by the Operators), are allowed to be picked up by the Process Agent for Posting into the "Posted Database", end up here.

You can see the details of sales in the Posted Database, by running one of the "Posted Sales Reports" available on the Report Launcher.

The Posted Database holds all the Customers, Inventory items and General Ledger transaction (Payments, Cash-Outs, Finance Charges, etc..), as well as of course Posted Sales records. This is why the "Billing" module, the "Accounting Interface Module (AIM)" (ie QuickBooks Interface), and all Marketing modules (such as the eManager) work off of the information stored in the long-term "Posted Database" files. These files are physically located in the C:\SMS\SET1 folder on the VT Server.

### The Processing Agent

As you can see on the diagram above, it is the "Processing" Agent that sends "Submitted" orders from the "Order Pad Database" into the "Posted Database". The Processing Agent like any other Agent can be scheduled to run on certain timer multiple times during the day, or run just once as part of the nightly "Server Shutdown" process, at the end of the day. Each has it's own tradeoffs. See Agents discussed in Appendix -1.

## Back-Link to "Posted Sales"

If you want to change something on an order, after the order has already been processed, then "Back-Link" is your "ticket!

In short, "Back-Link" lets you MODIFY the Posted Sales record simultaneously as you modify the processed order on the order pad. In other words, with "Back-Link" ON, you are modifying both databases at the same time.

Without Back-Link, once an order is Processed, the order is locked up with it's Posted Sales record inaccessible for making any changes. You can only Reverse (or Void) the Posted Sales, and then re-post it, in order to change any of the information on the Posted Sales records.

With Back-Link turned ON, for Processed (or Archived) orders, you can simply change various fields on the Order Pad itself (by clicking the necessary Delivery, Prep, Card, Other Info, Wireout, or Wire-in forms) and the Back-Link updates the respective Posted Sale record automatically and concurrently.

What could be simpler than that?! However, there are pre-conditions, and here they are:

- Staff Access level must be greater than the Level 1 - "Novice" (ie; due to NO dollar value impact).
- The Posted Sale record for the order must not have been Voided (deleted).
- The Attention Flag must NOT be ON.
- The "Back-Link" feature is switched ON (activated) on that Session (in Sessions Defaults - bottom of Order Entry tab).

- When the above conditions apply, the "Back-Link" indicator appears on top of the Delivery, Prep, Card. Wire-out, Wire-In, and Other Info forms, indicating that the Back-Link to the Posted Database has been established and is activate.
- Even-though "Back-Link" allows you to concurrently change and update many fields, you still can not change any of the DOLLAR values, switch Delivery Companies, or Wire Services.

The "Back-Link" label means the Posted Sales record has been identified and located, and is currently linked to the order. Any changes you make on the Deliv, Prep, Wire-out, Wire-In and the Other Info forms, will immediately update the respective Posted Sales information.

As mentioned above, to activate the "Back-Link to Posted Sales" for each session, please go to Session Defaults (under the Setup menu), go to Order Entry Tab, and check the box "Back-Link to Posted Database" on the bottom of the page. Please note that the system automatically activates the Back-Link on ALL of Station #1 (VT Server) sessions that are setup with User Access level = 4.

- Please note activating the "Back-Link" on each session, opens many additional files when the Order pad is opened. So it is best to activate it ONLY on session that is used mostly for Order Management tasks. Make sure you always close the Order pad, when not in use (to minimize the possibility of Posted Database file damage, in case the power glitches or other disasters).

Let's consider this. A Wire-out order was Rejected by Florist "A" and was forwarded to Florist "B", but you find out about this a day or two later after the order has already been processed during Server Shutdown.

With Back-Link turned on, all you have to do is to go to the order, click on the Wire-out button, and change the Florist information to Florist-B. With "Back-Link On" the Accept button is now available, and as you click it, the system prompts "Posted Sales Updated!". That's all there is to it!

The Back-Link feature goes beyond the changes you make on the Order pad. It also applies to the Wire-Out Processing Center, Delivery Tracking, and Production Tracking utilities. In other words, any changes you make to the Delivery form while in Delivery Tracking, will UPDATE the Posted Record right there and then!

The same feature applies to the "Wireout Processing Center" (available from Operations menu). With the "Back-Link to Posted Sales" active, you can quickly and easily change the Filling Florist information in Posted (Processed) Sale record.

With "Back-Link" activated and the User's Access level higher than 2 (Manager and System Manager access levels) the following applies;

- The "Back-Link" identifier appears at the bottom of: Production Tracking, Delivery Tracking, and Wire-Out Processing Center utilities. Indicating that you have the option to automatically UPDATE the Posted Sales records as you make any changes (via the Back-Link channel).
- On the Order Pad, with a Processed (or Archived) order, when you click on the HardCopy button at the bottom of the Order Pad, you will have the following options:
  - To Print / Preview the HardCopy of the current order (as before).
  - To Print / Preview the HardCopy of the Posted Sale.

This allows you to verify the changes you have made to the Posted Sale records.

### What does The Micro Florist do ?

The Micro Florist is the Posted Database Container. It is the "Back-End" application that maintains, repairs, and provides access to the "Posted Database" files in the form of various utilities and reports.

The Micro Florist is a mature DOS application that only a few years ago, used to run the entire show by itself. But now it is mainly used for the variety of built-in tools / utilities that perform those "extra" things, when and if necessary.

Almost all standard user interface functionality of the Micro Florist has already been transferred to Visual Ticket in some form or another. But still for those data centric operations involving super fast month-end routines, file structure evaluations, index generation, File Maintenance and so on, the Micro Florist is the one set of tools you want to have around.

According to the Software License Agreement, the Micro Florist can be activated by clicking it's Shortcut, only on the VT Server computer. But you can access it on all stations from VT Setup menu, while under Tech Support subscription.

## Visual Ticket Agents

### What are Agents ?

Agents are separate "Programs" that run in separate windows, in the background and perform very useful functions, that otherwise would require human attention and effort. For example, the Mercury Agent connects directly to the Mercury Host located at the FID headquarters, sending and receiving orders every 10 or 15 minutes.

All VT Agents (except the Chart Agent) operate on the "Order Pad Database", sending / receiving Mercury, Dove, Bloomlink orders, or orders from your website (via the VOX Agent). Other Agents such as the Daily Agent, the Print Agent, and the Credit card Agent each perform different tasks.

The Chart Agent charts the Long-Term financial data located in the Posted Database files, since it needs to go back in time more than a year, as necessary).

### Interfacing Agents

These are the Agents that Send/Receive orders from different sources such as Mercury, Dove, Bloomlink (now called "BloomNet"), and VOX Agents.

### Order Processing Agents

They facilitate Order Processing tasks such as the Daily Agent, the Credit Card Agent, the Print Agent, and of course the Processing Agent.

- The Daily Agent runs the first thing in the morning, looking at the Order Pad database, updating order status of Standby orders that have become due (automatically submitting them), changing Processed Orders into Archived orders, and Archived orders that need to be purged. It also generates the "Standing" orders scheduled for the day, plus many other Daily tasks.
- The Print Agent produces the Production Paperwork from a central location for all stations, and locations. Production Paperwork includes Work Ticket, Enclosure Card, Delivery Ticket, Shipping Label, and/or the Combined Ticket. The Print Agent looks for Submitted orders (in the Order Pad database) that have Print Request. It then produces the requested Print Job, and removes the Print Request flag. Having the Print Agent run from a central location, allows it to send Print Jobs for various jobs or divisions to different local (or remote) printers. It is a very flexible and powerful module.
- The Credit Card Agent processes credit cards for orders for which the Later button was pressed (in the Payment form to save time) or for those orders that have become Due and were Submitted by the Daily Agent.

### System Agents

These are the Agents that both "organize" and "monitor" access from various stations in a multi-user environment.

The "System Monitor Agent" mist always run in the background coordinating access to various databases in a multi-user environment (manages File Sharing and Record Locking mechanisms, and insures the System Click on all stations are synchronized).

If you accidentally close (quit) the System Monitor Agent, the Main Menu on all VT stations becomes disabled, after about 15 minutes.

You can also use the Monitor Agent to add/remove authorized Sessions on each station (which employees can logon to which stations). You can also modify Session Defaults settings of any session, on any station, from a centralized location.

The "Nightly Agent" handles the "Server Shutdown" process running a variety of critical tasks at the end of the day including; Processing Agent, File Maintenance, File Backup, building and transmission of scheduled emails via the eManager, building QuickBooks output file, etc., etc.

## Who's in charge ?

### The System Manager

When we talk about the System Manager, we are not referring to the technician who setups the hardware / network. We are talking about the person who will be "managing" the system and the information contained in it, for the long run.

Visual Ticket System implementation succeeds when one individual takes charge of the system and thus becomes the System Manager by default.

We believe that being the System Manager empowers the Owner/Manager to enforce shop policies (including increasing efficiency) through properly planned system implementation. An employee may not have the same goals.

You don't have to be a "Computer Expert" to act as the System Manager. All you need to do, is to make the commitment, read as much of this User's Guide you can stand, and then explore, explore and explore. Clicking on buttons does not require Master in Computer Science. You just need to learn this one system, but learn it well. It will pay off.

Of course you don't want to read the entire User's Guide all in one sitting, either! Take your time and read only one page or one chapter at a time, take a few days to try out what you have learned, and then start another chapter as a new project, the following week.

As the System Manager gains hands on experience running the "Entire" system, s/he can decide on which windows should be made Mandatory during order entry? What needs to be on the Prompter Windows for each employee ? Which Print Jobs should print to fill orders with ?. Who can delete sales, and who can't ?

The System Manager (like the default SM employee, that ships with the system) has the highest Access Level (of 4) and his/her password always starts with a . (dot or a period) such as: .MGR (which provides highest access level in Micro Florist).

The System Manager sets the Master Password (factory default is .MASTER) and decides who gets it. The System Manager is also the focal point for all contacts

with Technical Support. This insures that support issues are not duplicated, or contradictory action is not taken for the same issue, by different individuals.

The main responsibilities of the System Manager may include:

- To make sure all employees eventually buy-in into a "successful" implementation of this brand new system. There maybe resistance coming from certain employees, who are currently comfortable with the statuesque and resist changes in procedure and transparency that a system like Visual Ticket can bring. If individuals with lots of clout around the shop, decide on resisting the system, and gather support from other employees, chances of success will be deem.
- Think outside of the box when it comes to updating some of the existing procedures around the shop. Always consider improvements by using some of the new tools that are offered by VT.
- As time goes on, keep fine tuning your system setup to accommodate your long term goals. Take it one step at a time, and give each change couple of weeks for it to be accepted and digested.

### Financial Manager / Supervisor

Financial Manager is usually given Access Level 3 (or 4) and is the person who can access shop's Financial Information, but can not change system setting / behavior. The Financial Manager / Supervisor is given the Manager's Password (also .MASTER in Factory Defaults), which can be used to override Credit Limit changes and so on.

If the System Manager is not able to be at the shop at all times, the Financial Manager should be able to login as the System Manager when contacting Technical Support.

Operators / Employees

Operators are the folks who enter orders. The are usually given Level 2 access. Employees are people who occasionally access the system for certain tasks such as Drivers accessing Delivery Tracking utilities. They are usually given Access Level of 1.

# Technical Support

Technical Support provided by your (Value Added) Reseller (VAR), is referred to as Startup Support. While the long term "steady state" support you sign-up for, after the initial Startup Support has expired, is called Maintenance Support. Maintenance Support also includes Software Updates, Florist Directory updates, and Paid Services.

## Startup Support (VAR Support)

The Reseller provides you with options to purchase "Startup Support" as follows.

### On-Site Installation & Training

The extent of the on-site installation and/or training, the cost of the service, the number of days spent on-site, the traveling expenses, the number of technicians involved, and other specifics must be worked out and agreed upon between you and the Reseller, directly as part of the initial Purchase Agreement.

If at any times, you require additional on-site installation/training, you need to contact a VT Reseller. The Maintenance Support does not offer any on-site (or on location) services.

### Startup Phone Support

Some Resellers may offer FREE Telephone Support for periods of two to four weeks, depending on the terms of your Purchase Agreement.

## Maintenance Support (VT Support)

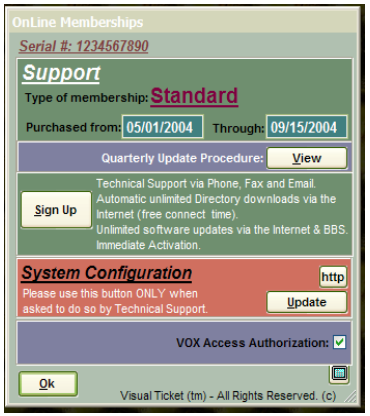
Once the initial 2-4 weeks of Startup Support has expired, you have the option to purchase Maintenance Support. Maintenance Support must be purchased and activated from your Visual Ticket system (via the Internet Agent).

### Sign-up for Support

From the Visual Ticket Main menu, go to Setup menu, go to Setup Manager, go to Tech Support Access button, and click on Sign-up. Enter your Visa/Master Credit Card information and click on Submit. The system will transmit the sign-up order for the amount and period specified and will open itself up for downloads and the continued operation of Paid Services.

The support sign-up is for 90 Days at a time (once a quarter), unless you have signed up for a Paid Service. In which case, the sign-up is for 30 days at 1/3rd of the cost.

Please click on the "View" button (located on the Support Access form) to download a 2-3 page PDF document containing the latest Contact Information, Hours of Operation, and the step by step procedures to download and install new update, directory files and other download requirements.




### Paid Services

There are certain features of the Visual Ticket system that are only available as a "Paid Service". These features require constant monitoring, modifications and additional development by the VT development team in order for them to remain operational.

Due to the very high cost of the initial development and continued support required, these features would be too expensive to license based on a purchase price. Some would be in the excess of thousands of dollars which would be lost if and when the service is either discontinued, the corresponding wire service is dropped, or the Merchant Account is changed.

There are also third party Software Licenses and ongoing Gateway Fees that need to be paid (some in advance) to various external companies for the use of these features.

As a result we offer these features as "Paid Services: with only a modest "Setup Fee", and then the customer pays a small "Pay Per Use" fee, while the feature is actually in use. Once the feature is no longer in use, the Paid Service maybe deactivated. Currently we offer following Paid Services;

- Instant Approval.
- Mercury Direct Interface Agent.
- Florist Direct (VT Network) for wire-out orders.

Please contact Visual Ticket Support for the current Paid Service fee schedule. There is usually a "per transaction" fee with certain minimum quantity of orders per month allocated. For example, 15 cents per transaction with minimum of 300 orders per month, means $45/month for up to 300 orders. The $45 is added to your monthly Support fee and is paid when you sign up for support.

## Technical Support Backup

For Startup Support, the Reseller is in charge of 1st Line of support, while the Maintenance Support team maybe called upon as the 2nd Line of support depending on time zone, and the level of expertise required to handle the issue.

For Maintenance Support, Visual Ticket is always in charge of 1st Line support, while the Reseller maybe called upon to provide 2nd Line of support, only as the last resort, depending on the time zone, and the urgency of the issue at hand.

## Opting out of Support

Signing up for Technical support is NOT mandatory. However, if you have signed-up for a Paid Service, if you decide not to renew your support membership, the paid Service feature will expire (cease to function).

Once your Maintenance Support membership expires, you will not be able to obtain the latest versions of the Visual Ticket and Micro Florist software, downloads, the latest version of the Florist Directory files, updated versions of US zip code files, and other update files.

### At least Once a Year

If your operations are just not big enough to accommodate Support Membership, we recommend that you sign-up for support at least once per year, in order to keep up with critical updates.

These minimum downloads can make huge difference in your system's performance and features, so that they can maintain compatibility with new versions of Microsoft Windows updates, or even changes to Data Policy, required by law due to tax law changes, or security issues having to do with handling of credit cards data and so forth.

### Cost of updates

Please be advised that at least one Support Sign-up per year is required when the system software falls behind by more than one year. In other words if your software is behind by 3 years and decide to update it, you would need to pay for 4 updates. So, performing one update per year also makes economic sense.

### When to Signup ?

In this case, you may want to synchronize that once a year sign-up (and downloads) with the busy holiday season (winter/spring) such that you can obtain the latest features and enhancements, refresh your Florist Directory files, catch up with all the necessary downloads, and reactivate Paid Services for the duration of the holiday season, at the same time.

You may TEAR OFF this page.



**Confidential** (For Owner/Manager Eyes only !!)

# Managing Deleted Records

This application note pertains to managing **deleted** sales in both the Posted Database (Long Term Micro Florist), as well as the Order Pad Database. You may want to tear off this page due to it's somewhat sensitive nature.

## Deleting Sales in Posted Sales Database

Once Visual Ticket orders are processed (by the Process Agent), they are posted into the Posted Sales Database's permanent files. To delete sales in Posted Sales Database, from the File menu, go to Posted Sales, select the Sale in question and press the Delete button. Master Password is required for this operation. Once a Posted Sales Transaction is deleted, a copy of it is placed in the file **"C:\SMS\SET1\HIST.DBF"** on the Micro Florist Server.

## Deleting sales in Order Pad Database

In Visual Ticket Order Pad any order may be deleted by clicking on the "Delete" button on the Toolbar. The system requires the Supervisor Over-Ride (authorization), if the User's Access level is less than 3. A copy of the order is placed in the file **"C:\SMS\VFT\vHistory.DBF"** on the VT Server.

## Deletion Control Setup

To change the Default "Deletion Control" password, from the Setup menu, please go to the Setup Manager, go to Environment Setup, then click on Page_2 tab.

## The Reason For Deletion

You can also make it a requirement for the Operator to enter the REASON for the Deletion. Once you check the "Ask for Reason" checkbox, a Blank response will not be acceptable. The Operator needs to type-in something in order to allow the Deletion process to continue.

## Viewing Deleted Records

- From VT main menu, please select the Administration menu, and activate the **Balance Utility**. The Session's Access Level must be 4 in order to continue with this operation. When prompted for password, enter the word "please". (to change this password see "Deletion Control Setup" above).
- In order to view / print the orders Deleted from the Order Pad, Double Click on the label "Order Qty". To view the contents of the order's Memo and the Reason for Deletion, double click the column memo.
- In order to view the Deleted records in Posted Database (MFS), Double Click on the label "Sales".
- The system prompts for the password, and will then open a Browse window moving the pointer to the record of the last order that was deleted. Please note that in Posted Sales, the Sales Summary Report also shows the amount of deleted sales for the specified Time Interval.

## Erasing Deleted Records History

In order to completely **erase** all history with respect to Deleted sales, double click on the "Starting Balance", or the "Change/Cash Back" labels on the Balance Utility to erase "Order Pad Database" or "Posted Sales Database" History files respectively.

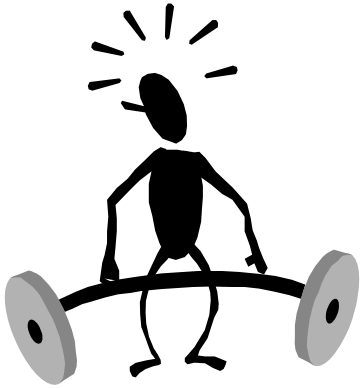
## Manager's Special Report - (OP12)

This report extracts orders that were paid by CASH and then were saved MULTIPLE times, with the total amount of order being reduced at each Save.

The information for this report comes from the data that is logged in the order History which keeps track of the changes made to the total amount of order at each "Save".

## How to RESET order history to not flag such sales?

For Cash Sales w/Access Level 4, you may RESET the order History, by clicking on the little button with "Key" icon. (available on the Other Info form).



# NOTES

# Chapter 2

**Recommended read for:**

1) System Manager
2) Manager

## The Road Map

### Running Visual Ticket

This chapter talks about starting Visual Ticket, doing a quick setup on your Station #1 (the VT Server), and downloading the necessary files to make sure you are running the latest version of the software and Directory files.

Please see the Appendix -1 for detailed instructions on installing the CD and setting up the system on multiple stations and various accessories.

### Is the Network Ready ?

Before you go start the system (each day);

- Make sure System Clocks are in Sync. Each system's time and date appears on the Windows Taskbar on the lower left hand corner. In order to change it, double click on it. One indication that the system clocks are not in Sync., is that the System Monitor Agent will disable the station's menu.
- Click on the My Computer icon, and make sure all the Network Drives/Printers are available (no red X's on those drives/resources).

### Quick Setup

#### The "Tulip Screen"

Once you double click on the Visual Ticket shortcut, the system comes to the "Startup Utility" which we will refer to as the "Tulip Screen". The system may inform you that a new Configuration has been installed. Go ahead and click OK.

The "Tulip Screen" is the Front Panel for getting everything in check before you actually login to the Visual Ticket. For now, please select "Station #1" from the dropdown control.

#### File Maintenance

- Click on the F button (located on the right side of the tulip picture). The system prompts for "Master Password", enter .MASTER (dot master) and hit the Enter key.
- Then, click "No" for the next prompt ("Did Tech Support…?"), then click "Ok" and run Server Level File Maintenance with Micro Florist checkbox checked.

#### Connections

For detailed "Local Connections" setup see Appendix -1.

But for the time being, we'll do a quick tour of and basic setup, so that we can enter couple of orders.

- The Disk Id selection for Visual Ticket Data (Order Pad Database), the Micro Florist Server and Host folders should all be the Local C drive (unless you have installed VT on a disk drive other than the C: drive).
- Click on "Background Picture" button and select a screen pattern file. You can change the folder and select any picture you may have on your computer.
- Please make sure Startup action is set to #5 (to launch the agents).
- Go to the Print Tab and click "Reset Printer Names" button. This will make sure you have a valid Printers for all print jobs for the time being.

#### Hardlock and UUV

- If you have received your Unlimited Usage Version (UUV) Hardlock device, connect it to the USB port and click on the "Configuration" button.
- Click the UUV button to download the latest configuration from the Visual Ticket servers. Once finished, exit VT and restart to complete the installation..

#### Month-End Routines

On the Tulip screen, click on Continue button. If the system requires to run the Month-End routines in order to catch up to the current Accounting Period, it will automatically start the Micro Florist and at the same exiting the Visual Ticket.

While you are in Micro Florist, the fast's way to move around, is to use the Arrow keys (don't use the mouse). Use the Enter key to make your selection.

Once the Micro Florist comes to the product Information window, hit the Enter key a few times and the system should finish the Month-End routines and park itself on the Main menu (Cash Register selection is highlighted).

Use the Right arrow key to move the menu selection to "Close" and exit the Micro Florist. Restart the Visual Ticket.

### Login

- On the Tulip screen, click on Continue button again. This time the system brings you to the Login screen.
- From the Employee Staff_Id dropdown, select the default employee Staff_Id known as the System Manager (SM). The password for this employee (until you decide to change it) is .MGR (dot MGR). Type the password and hit Enter (or click Ok button).

### Agent Launcher

At this point, the Agent Launcher is activated counting down from 9 to 0, giving you the chance to stop the Agents from being launched. Wait 9 seconds and let the Agents launch.

In future logins, you can stop the agents from being launched, by clicking on the All Stop button. Then you click on the Door button to close the Agent Launcher itself. You wouldn't want to launch the agents if;

- The Agent are already running (see Windows Taskbar at the bottom of your screen), or
- It is After Hours, and you are making a quick visit to Visual Ticket to print a report, or something like that.

- The "Close All" button terminates all the open agents, but it takes about 5 minutes to do so (until the Agent timer kicks in and finds the Exit command). That is why it is always faster to close the agent manually (by bringing them up one by one, and clicking the Exit button) if you want to run a File Maintenance or Shutdown the system.

Once the agents are launched, you are brought to Visual Ticket Main menu (which consists of File, Administration, Agents, Operations, Setup and Help).

## Business Parameters

It is time to setup your tax rates and some of the default values such as the default Delivery and Service charges. From the Setup menu, go to Setup Manager, click on the "Business" tab.

### Sales Tax

Click on the "Access" button for Sales Tax setup. The Sales Tax form is displayed with different tax rates for various counties.

If you have single Sales Tax rate, change the Tax Rate for the Default County, to the applicable tax rate. You may also change the name of the Default County to the name of your county (click on it and change it).

In case you need to have multiple tax rates, change the county names and tax rates for 2nd, 3rd, and 4th counties. Activate the new tax rates by checking the "Activate ?" check box.

### GST (Canada)

For our Canadian customer, please enter the GST rate on this grid, and click the "Activate?" check box to activate it. Click on "Ok" button and close the Sales Tax form.

Now, click on the "GST Type" dropdown box, and select "Standard" for all Canadian Provinces, except for Quebec. Select "GST on Sales Tax" for the province of Quebec.

There is also another checkbox with respect to "Adding GST to wire-in orders". If the wire service is handling the GST collections/payments, you may wish to check this box to disable calculation of GST on all wire-in orders. Check with you Accountant. There is a whole section in the Order Management Chapter dedicated to issues regarding "Canadian Taxes". Check it out.

### Service Charge on Wireout orders

The Service Charge on Wireout orders (also referred to as the Transmission charge), is the amount charge by the Sending Florists for placing and processing Wireout orders. This amount is kept by the Sending Florist (does not become part of the order). Enter the amount you charge for Service Charges on Wireout orders here. This amount is then changeable for each order, on the Order Pad.

Check the "Is Service Charge Taxable ?" checkbox, if this amount is subject to sales tax in your county.

### Delivery Charge on Wireout orders

The Delivery Charge on Wireout orders, is the amount the Sending Florist charges the customer for the Filling Florist to deliver the item to the Recipient. This amount is transferred to the Filling Florist as item's Delivery Charge. Please enter the "default" delivery charge on Wireout orders here. This amount is changeable for each order on the Order pad.

Check the "Wireout Delivery Charge Taxable ?" checkbox, if this amount is subject to sales tax in your county.

### Division Names

- Applicable only to Multi-Shop operations.
- This utility allows you to specify specific names for each of your Divisions (ie Branch Stores).
- This is especially applicable to shops running Terminal Services or the VOX (Virtual Order Transfer) agent for transferring orders among branch shops.
- When you specify the Division names here, the operator will no longer has to remember which division number corresponds to which store.
- this feature is used mainly in the Order Pad's "Other Info" form for specifying the "Sale Division" and the "Assigned Division" (Destination in the case of VOX operations).

## Test Orders

Now that we have done some preliminary setup, lets go ahead and enter a few test orders of different kind, just to get a better handle on which area need further setup and customized.

### Watch the Movies

But before you enter any orders, now would be a great time to get a refresh course on system's User Interface and the general look and feel of the Order Pad.

To do this, the fastest and the most productive method possible is to watch the movies that came on the CD (one more time).

Put the CD back into the CD drive, and select to watch the Movies, and especially emphasize the Order Entry segments.

The may also additional Visual Ticket Training Movies available either on the Internet or via a separate CD. VT Resellers have developed their own set of demo / training movies. Consult your Reseller or search the web.

- TIP: Move your mouse slowly over each button (on the order pad toolbar or elsewhere) to see the "Tool tip" (the function) of that button. Sometime, the icon alone is not enough to explain what the button actually does.

### Enter orders

To enter an order:

Open the Order Pad from the File menu. Click on "New Order" button on the Toolbar. Select General Sale from the top dropdown control Enter Sender information. Select "Carry" for the Type dropdown (on the line item gird. Enter a Price, click on Payment Click on shortcut button for Paid By Cash (or press Alt-1). Click on Accept. Click on Save. Click on Submit.

You have just entered your first Visual Ticket order.

To see the different types of sales (delivery, wire-in, wire-out, pickup, etc.) and their corresponding forms, see the following chapter "Order Entry".

### Deleting Practice Orders

Before you run Server Shutdown (or the Process Agent), you may want to delete all the test orders you have entered. Otherwise, the orders will be Posted (processed) into the long term Posted Database.

To do this, from the File menu, select "Delete All". This will delete all orders in the Order Pad. You will be prompted for the Master Password. Enter .MASTER and let it run the File Maintenance.

### Deleting Posted Orders

If for some reason, you did run the Server Shutdown (or the Process Agent), and all those Submitted test orders found their way into the Posted Database, it's OK. At this stage we can go ahead and reset the Posted Database (or Micro Florist files) back to the Factory Settings.

To do this, start Micro Florist, from the Main menu, go to Setup menu go to File Maintenance, and select "C" for "Clear and Reinitialize".

NOTE This will delete all Posted Orders, Customers, Inventory items.

## Fine Tuning the System Setup

Now that you have entered a few orders, added a few customer, and printed few tickets, the time is right to fine tune the System Setup.

You don't have to be as detailed oriented, as we have outlined below. Most shops are satisfied with the "Default" settings of the system. But the important point is, if you are going change something, you might as well do it now, so that the information will be consistent for all data (since there is no data yet).

- Print Job setup (see Local Connection / Print Setup appendix). Create User Define Templates to further customize the Production paperwork.
- Order your Pre-Printed forms.

- If you have decided to use the Combined Ticket (the one that has the Enclosure Card, the Work Ticket and the Delivery Ticket all on a single perforated Legal Size sheet of paper), then you need to order that.
- If you have decided to use Pre-Printed forms for your Statements and Invoices (instead of using a Color printer), then you also need to order those.
- In either case, do not settle for what John Henry (or others) may have as "standard" Visual Ticket forms. Populate each form to the max (with lots of text), print samples on your own printer(s), and then have them design your Pre-Printed stock around the actual printed output. You want the pre-printed logo, and the perforations not to hit any of the Print Job contents, and of course, you want to make them look as good as possible.

➢ Set Customer Defaults (see Customer Chapter). Pay special attention to Customer Type codes (used for special Billing requirements, or Marketing campaigns you like to run in the future).

➢ Enter Customers with existing balance.

➢ Define your Inventory items (see Inventory Chapter). To see how important the whole strategy of assigning Item_Id to your inventory really is, go ahead and print the Z-Report on Balance Utility (see corresponding chapter). Assign Item_Ids in such a way that the Z-Report will reflect the true grouping of items, based on the different product categories you carry and would like to track separately, as a group.

➢ Fine tune Session Defaults as to which forms should be mandatory, whether or not QuickCash Automation is turned on/off. See Session Defaults section in "Visual Ticket Setup" Appendix.

➢ Setup Standby Parameter, Delivery Zones, Dropdown Lists (Visual Ticket Setup Appendix).

➢ Setup Employees (See Employees Chapter).

➢ Test Mercury, Dove and BloomNet agents (both Incoming and outgoing if applicable). See "Accessories Setup" in Local Connections Chapter.

➢ If you have purchased the license to run Instant Approval (or the Credit Card Server), make sure it is fully operational before you go Live.

- Going Live without the fast and automatic Credit Card processing may reduce some of the excitement around the shop. Run test authorizations for Visa, Master Card, Amex, and Discover) to make sure everything is running smoothly. Verify that Settlement funds are been deposited into your checking account.

➢ If you are using the Accounting Interface Module (AIM), your IIF must be ready and tested for import into QuickBooks.

➢ It is extremely important to make sure that the entire shop staff (especially those who will be using the system) are FULLY behind you on this project. If anybody has negative attitude on System Implementation, it needs to be taken care of and resolved.

## Going Live

You should now be ready to go LIVE. Start on a weekend or on a slower day.

Make note of rough edges and problem areas.

➢ It maybe a little too ambitious at this point, to expect anybody to enter orders in real time (enter them while talking to the customer) during the first couple of days. If you are not yet comfortable, do NOT rush it. Write down the orders as before, but enter them right after.

➢ Perform nightly Order Pad Status Review (see the Order Management chapter).

➢ Run the Balance Utility starting with the first night to make sure you can Balance (the calculated totals match the counted totals with no discrepancies).

➢ Run the Process Agent to Post (process) the Submitted orders.

➢ If you use the AIM do a "Build" and import your first IIF into QuickBooks. No point in falling behind.

➢ Print Invoices for the Billed orders on this day (so you can start improving your Cash Flow right away). See the Billing Module in the Customers chapter..

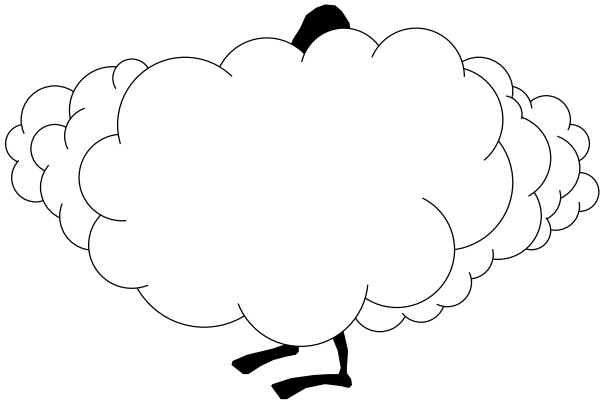
➢ Make sure you run the Server Shutdown once at the end of the day.

## The Adjustment Period

After you go "Live", the first month or so, is the real "implementation" period. While everybody starts getting used to the system around the shop, the System Manager brings other modules online, gradually.

- The first one would be topics discussed in the Order Management Chapter.
- Followed by the chapter on Order Tracking and of course Mapping.
  - Take your time, if necessary. The important point is to implement the next level when you are ready, and all caught up with the last project.
- Once you have a month worth of data, it's time to finish Cataloging Reports (See Reports in Balancing & Reports chapter).
- After the "Operational" aspects of the system implementation are under control, its time to read up and exploring the Marketing chapter.

You will probably make more adjustments to the system setup and fine tuning default values during this "Adjustment Period", than you probably will for the next couple of years. So, allocate little more time learning and exploring the system, while knowing that this too shall pass. But once the system is fully implemented, it'll save you enough time to make up for all that, and more….



## Check Lists

There are arguments on both side, regarding whether or not it is better to turn systems off during the night or let them run continuously.

We recommend that you Turn-Off all stations at night and start each day, with Self test at reboot and a fresh copy of the Operating System loaded.

For shops that like to run their Mercury, Dove, Bloomlink, or VOX Agents over night, we still recommend that you occasionally reboot those stations, for that occasional "System Reset & Run" moment.

### Turning System On

- Start VT Server. Wait until they it reached Windows Desktop.
- Start all Satellite stations; wait until they reach Windows Desktop.
- If you are running ICVerify, start Network Authorizations (IC-Multi) on the ICVerify station.
- If you are running Instant Approval or the mercury Agent, make sure you are connected to the Internet.
- Check "My Computer" window, and make sure Server Disks are available.
- Check Printers and make sure they are online, and have paper.
- Start Visual Ticket on the VT Server.
  - If it is the first day of the month, the system will automatically start the Micro Florist.
- Logon and let it launch all of it's scheduled Agents.
- Start Visual Ticket on other stations. It is recommended that you start the ones .that need to launch their Agents first.

### Turning System Off

- On Stations: Exit the Visual Ticket, the Micro Florist and any Agent that maybe running on those Stations. (check the task bar and make sure nothing is still running).
- On the VT Server, shutdown agents one by one. Run Server Shutdown if you haven't done so already for the night.
  - If a station or an agent is still running by this time, the Nightly Agent issues "Require Exclusive Access" prompt with "File in use" error.
- If you use ICVerify, close IC-Multi on the Credit Card Server station.
- Run any scheduled maintenance tasks such as Tape backups, Scan Disk, Cleanups and Disk Defragmenter. See System Manager Chapter.
- Shutdown Windows on all stations first, and then the VT Server.
- Power down all stations.
  - If you need to run the Mercury Agent over night, restart Server, Login, when Agent Launcher pops up, click on "All Stop" and then click on the Mercury button to only launch the Mercury agent. Exit Visual Ticket such that only the Monitor Agent and the Mercury Agent are running. Make sure the printer that prints Incoming Mercury orders is on and has paper. Turn off the lights.

# Chapter 3

**Recommended read for:**
1) System Manager
2) Manager
3) Operators

## Order Entry

### Overview

When you select "Open Order Pad" from the VT File menu, the Main order pad is opened with the same order as the last time (the order pad was opened).

There is also another order pad called QuickCash which is optimized for fast Cash/Carry sales at the front counter(s). More on that later…

### Order Pad Display

#### Windows Desktop Area

The higher the Desktop Area of your Windows screen, the more space you have on the screen, to open windows simultaneously. When your Desktop Area is only at 800X600 the order pad takes over the entire screen, and any order window you open, will cover some portion of the Order Pad.

If you setup your Desktop Area at 1024 X 768, you will have spaces on the bottom, or on the right side of the Order Pad to place the Combined form, the Prompter, the Payment, or other windows associated with the order pad. You can also open a second Order Pad window, and move it down below the first order pad. This way the two order pads don't cover each other up.

At this resolution level, you have enough space on the screen to open the Production, Delivery Card, and the Payment simultaneously on different parts of the screen.

You can setup Windows Desktop Area by right clicking anywhere on Windows Desktop, go to Properties, go to Settings, and increase the Screen Resolution. Make sure The Color Quality does not fall below 16 bit.

From some folks, when the Desktop Area is set to 1280 X 1024 or higher, the fonts maybe too small for a 15" monitor. That is why larger 19"" monitors are desirable (but more expensive).

#### Placing Forms on the screen

You can move each "form" (aka window, or screen), by clicking on the title band of the form, and dragging it to a new position. Visual Ticket remembers the new location of the window, and the next time you open the window, it will be placed at the designated area.

You can also click on the lower right corner of the Order Pad (or any other Order Visual Ticket form), and by dragging your mouse, "resize" it. Please note that you can not get too drastic with resizing, since the font size that the can system use for resizing, may not be available in your Windows Font setup. If you resize the order pad to a 1" square, the system will obviously issue an error.

The Toolbar is also movable and can be either floating somewhere on the screen, or be anchored (docked) on top, bottom, left or the right side of the Visual Ticket Desktop. Just make sure you don't move it outside the viewable area.

As reflected in the Setup Appendices of this User's Guide, each employee can setup his/her own color preferences for the Screen Background, and Data Entry fields. You can also setup personalized photos for the default bitmaps and the Main Visual Ticket background (great idea for saying Happy Birthdays or for those special holidays).

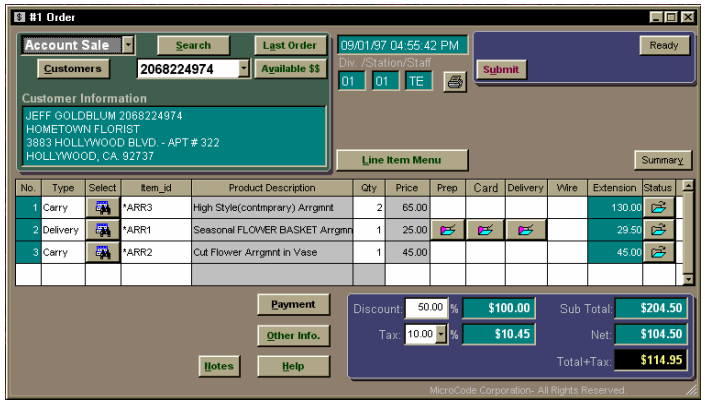
The system always remembers the last order that was accessed on any given station, and will always re-open the order pad with that specific order (even if you exit and restart the system).

- You can change the size of each column on the grid, by clicking on the upper band of the grid, and dragging the column left or right.

### Entering a new order

Based on the parameters setup in the Session Defaults (on Setup menu), the new order is added either as a "General Sale", or as an "Account Sale". The system always remembers most of the values from the previous order, and uses them in the new order to minimize keystrokes. For example, the type of Line-Item sale, the Item sold, the Delivery Company selected, the Wire Service, the Mercury Priority, etc., etc., are remembered, and repeated on the new orders.

# Main Order Pad




## Achieving Perfection

- The idea is, as you use the order pad and become used to it, you should try and enter the entire order using the Keyboard alone (no mouse).
- In order to move the "focus" out of the grid, remember to use Alt-P to go to the Payment" window, or
- Use "Alt-L" to activate the **Line-Item Menu** button. Remember, any character on the button labels that is underlined, that character is the "Hotkey" to activate it (by using the Alt key with that character). Once you get to the Line-Item menu button, then from there you can jump to other fields or buttons, such as the Discount field.

### Tab Sequence

In Microsoft Windows Interface, the **Tab** key is a very special key. It is always used to move from one field to the "Next" field using the keyboard. Which field is designated as the "Next" field, is programmed into the software and is called "The Tab Sequence".

On the Order Pad, the Tab Sequence always goes from the "**Line Item Menu**" button to the "Line Item Grid" (the big Table on the Order Pad). Then as you Tab through the Line Item field (Type, Item_Id, Item Description, Qty, Price, and all the other buttons that are located on each line of the grid), the focus goes back to the "**Line Item Menu**" button, allowing you to either add another line item, or go to Payment button.

Once the Payment section is finished, the Tab Sequence will take you to the "Saver" button, and then immediately to the "Submit" button (kind of anticipates your next move).

### Cut & Paste

Say you have entered a bunch of characters into the "Notes" field on the current order (located on the Lower Left corner of the screen). And now, you want to repeat that whole thing on the following order(s). In computer lingo, this action is referred to as "**Cut & Paste**". The "Cut" part refers to submitting the contents of a field into Window's Clip Board, and "Paste" means dumping the contents of Window's Clip Board into a field.

- To "Cut", move the cursor to the first character, and by holding down the "Shift" key, move the right arrow to highlight the string you want to "cut" (you can use the mouse as well).
- Once you have highlighted the characters you want to cut, press "Ctrl-X". This will "Cut" the strings right out of the Notes field.
- Now don't panic!, you haven't lost that content. Press "Ctrl-V" to Paste it right back.
- Now that we have the desired content copied into Window's "**Clip Board**". From here on, every time you press "Ctrl-V", you can copy that content to any other field. Thus reducing keystrokes, which is what we are talking about in this section.
- As mentioned above, it does not even have to be the same field (in this example the "Notes" field). You can copy the content of the Clip Board to any other Visual Ticket field, or even any other Windows application (Word, Excel, Notepad, etc.), by pressing Ctrl-V.

### Shortcuts for Fast Entry

- For General Sales, when entering the Sender's name, if you click on the labels "First", "Last" or "Phone", the system will repeat the values from the last order into those fields.

- You can you quickly erase, Copy or Paste contents of given field (in this case the Notes field) by "Right Clicking" on the field. The "Right Click" feature works on any field such as the Driver's Notes, Choice_1, Choice_2, Care Tag, Customer memo, Sender's name, etc., etc. The Right Click function presents you with the following menu:
  - Cancel
  - Copy to Clipboard
  - Add to Clipboard (appends to the existing contents of the clipboard)
  - Paste from Clipboard
  - Clear the field
- You can also right click anywhere on the grid (or press "Alt-L") to activate the "Line-Item Menu" button.

### Special Considerations

- Entering an order that is not yet due (referred to as Standby order) will put all other line-items on the (including Wireout orders) on hold until such time when all line-items have become due. This is due to the fact that an order can not be "partially" processed. The order is either due (and ready to be processed, as a whole), or it is not.
- Do not combine Standby orders with orders that need to be processed sooner (including Wireout orders). If a customer wants to order something to be delivered in 2 weeks, and a Wireout order that needs to be sent out tomorrow, then you need to enter each order in a separate sale (with 2 different payments).
- For Account Sales, the "Average Purchase" for each customer is displayed on the Order Pad. The value of this field is updated as orders are Processed (posted into the long-term Posted Database).
- When entering orders that include more than 5 "line Items", you can use the "Expand Grid" selection on the "Line Item Menu" to display the grid with up to 9 lines. The Expand/Reduce Grid selections operate as a "toggle switch" allowing you to change the display of the grid from 5 lines to 9 lines, and back.
- Changing the "Item Description" directly on the Line Item grid by Double Clicking on the Item Description dropdown control. A User Input prompt pops up, allowing you to change the Item Description. Once you make the necessary changes and hit the Enter key, the Item Description on the grid is updated. This is especially useful for Cash & Carry sales, since for all other types of sale, you can change the Item Description on the Combined or Prep forms.

## Order Entry Skills

The most important skill to master is the quickest and the most efficient way to enter orders. In the following sections we will give some hints on how you can use all the available shortcuts to reduce the number of key-stokes and achieve maximum speed while entering orders. You must practice using the Tab key and the "Alt-x" shortcuts to finish any order without using the mouse.

While entering the order you should quickly add/select the customer (see Account Sale below), and then select the type of Line Item sale, activate the "Combined Form", enter the information, hit "Alt-P" to activate the "Payment Form", enter method of payment, and "save" the order.

A more general pathway for tabbing through the order is to fill out the Combined Form, and then press "Alt-N" to activate the Notes field, and tab across to the Discount Rate, followed by the Sales Tax dropdown box, and then tab to the Payment button.

Using this method allows you to access the additional fields mentioned, however, if you do not need to access all these fields, then use the "Alt-P" shortcut instead, as mentioned above. You may also want to use the "Alt-L" shortcut to activate the Line Item menu, which will then allow you to navigate to different areas of the order pad, using keyboard alone.

Obviously on the Main order pad, the "Combined Form" is where most of the information is added using a single form. The individual "Prep", "Card", and "Delivery" forms are for reviewing the corresponding information after the order has already been added (or Saves and Submitted).

### Enforcing your Rules

The Visual Ticket system automatically enforces the Order Entry rules you setup for each session in Session Defaults (see Appendix). Some rules are embedded in the Order Pad, by default. Such as;;

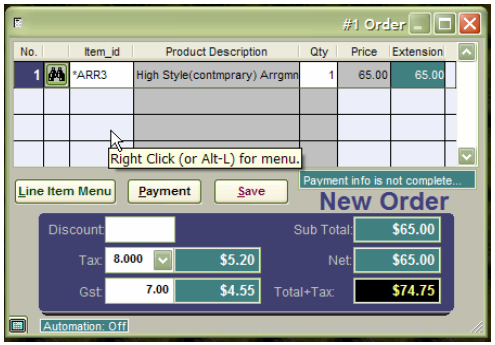
- You may not save the order without accessing the Payment form first.
- The system does not allow "Negative Change" in the Payment form. In other words, the total amount of order must be covered by the method of payment.
- When you access the Customer file, the Payment form needs to be revisited. This is due to the fact that each customer has it's own Tax and Discount

setup. Also, when you are changing the customer, it's only logical to make sure the "new" customer agrees with the method of payment.

- When changing the Type of Sale for a Line Item, the "Prep Form", and the "Delivery Form" need to be revisited. This is due to the fact that available items for Local Sale, versus Wireout sale are different, and the item needs to be reselected, and the item description needs to be updated. Also, the Delivery Form contains the Delivery Charge, and the Service Charge, and these values need to be revisited, when the type of sale is changed.
- When a particular form is needed to be revisited, the system informs you which form it is, and it automatically activates the form.
- When entering a "Refund" or a "Return", enter a Negative Quantity (and not a Negative Price). Also enter the Delivery Charge and the Service Charge as negative numbers. Consequently, in the Payment form, the amounts for the methods of payment should also be negative numbers.
- It is strongly recommended that you "Turn Off" the "Are you Sure ?" checkbox in Session Defaults (see Appendix) as soon as you are comfortable with the Order Entry process. This will speed thing up even more.

# Quick Cash Order Pad

## The Order Pad




The station(s) located on your Front Counter which perform as the "Cash Register" require an optimized way of entering the walk-in Cash & Carry sales, in the fastest possible way.

Visual Ticket addresses this particular need with a special Order Pad named "QuickCash". The QuickCash Order Pad is about 1/3rd the size of the Main order pad, and it only enters "General Sales" with single (or multiple) Cash & Carry Line items. As a result, the QuickCash will only have access to the Payment form. You can access the "Other Info" form from the Payment form if needed.

There are two important differences between the Main order pad, and the QuickCash.

### Special Features

- When you open the QuickCash, the system automatically starts a New order (thus you don't have to click on the "New Order" button (or press Ctrl-N shortcut) to start a new order. Please note that you can open the QuickCash by pressing the Ctrl-Q shortcut.
- Once you save an order, the order will be automatically Submitted (thus you don't have to click on the Submit button (or press Alt-U) to Submit the order.

### Mastering the QuickCash

Here are a few useful hints in speeding up QuickCash order entry:

- As soon as you open the QuickCash, and start a new order, the system parks the focus on the "Search" button on the Line Item grid. To select an item using the Search Engine, press Enter and type in the item's Item_Id. If you are using Barcode, the system will let you scan the item's barcode to select the item.
- If you prefer to use the Item_Id or Item Description dropdown controls to select the item, press the Tab button once followed by Alt-DownArrow) to

open up the dropdown. Then use the arrow keys to locate the item you are looking for.

- Tab over to the Quantity or Price fields, and enter the appropriate values.
- If there are additional line items, press the "Alt-L" shortcut to access the "Line Item Menu". Hit Enter to add the second item.
- If there are more than 5 line items, you can "Expand" the grid from the Line Item menu to view the additional line items. Press "Alt-L" again to access the Line Item menu, and reduce the grid size back to normal.
- Once you are done with adding the line items, press "Alt-P" to activate the Payment form. In the Payment form press "Alt-1" shortcut to enter the entire amount under "Cash" method of payment. Press "Alt-A" to Accept the payment and close the form.
- Press Alt-S shortcut to Save and Submit the order.

## QuickCash Automation (QCA)

QCA is available for both the "Main", as well as the "QuickCash" order pads. You can turn on QCA (for each order pad separately) from Session Defaults in Setup menu (see Appendix).

QCA streamlines the order entry process and provides an even higher level of "Automation" (i.e. keystroke reductions). The idea is to emulate a Mechanical Cash Register, as closely as possible.

For the QuickCash order pad, the extra automation also involves the order pad itself. But for the Main order pad, it basically makes the behavior of the Payment form consistent between the two order pads.

First we list QCA behavior, as it applies to the QuickCash order pad.

- Upon activation or when adding a new Line Item, the Search (or Barcode) button is automatically activated.
- After selecting an item, focus goes directly to the "Item Qty" field (bypassing the Item dropdown controls).

When the Auto-Submit switch is turned OFF (in Processing Parameters Setup in the Setup Manager), the QuickCash now displays the message "Auto-Submit is OFF' to let the Operator know as to "why the orders are not being automatically Submitted ?".

### QCA in Payment form

As mentioned above QuickCash Automation in the Payment form is available for both order pads (the Main, as well as the QuickCash). Here's what happens when activated; When either of the two QuickCash Automation switches are turned on (in Session Defaults), the Payment form operates in the "QuickCash" mode. To indicate that "QuickCash" mode is turned on, Visual Ticket displays a little label at the bottom of the Payment form, that reads "QuickCash On (Press ESC to Cancel)". So, that when you are in the Payment form, you know what to expect.

- Pressing the Esc key disables QCA, closes the Payment form, without saving the order or opening the drawer.
- If you wish to cancel the QCA mode on the Payment form (temporarily), but NOT close the Payment form, then simply click on the label "QuickCash On".
- For obtaining authorizations, the "Later" button is no longer visible in the Payment form. Unless you Cancel QCA (per above paragraph).
- After selecting "Payment by Credit Card", focus goes directly to the Card Number field (bypassing Credit Card Account selection) for immediate swiping of the credit card.
- After swiping the Card, QuickCash automatically obtains the authorization, and prints the Credit Card Slip, Cashier Receipt, and closes the Payment form.
- For Payments by Cash/Check, "QuickCash Automation" automatically opens the Cash Drawer.
- You can set the option for the Drawer to open while you are in the Payment form (default mode), or after you click on the "Save" button. For option 2 (open while saving), the Drawer opens only once, right before the first Cashier Receipt is printed. This option is also setup in Session Defaults.
- When there already is a Credit Card number (whether it comes from the Customer Profile, or is there after re-opening the Payment form), the system does not automatically process the credit card.
- Pressing the "Accept" button in the Payment form, closes the Payment form, opens the Drawer, prints the Cashier Receipt, and Saves the order (all with a single click)
- After saving the order, the order is automatically "submitted", but in QCA mode, the system prompts you to immediately open a new order (requiring only a single key stroke).

- Obviously this level of automation reduces flexibility to some extent, such as; "Forcing an Authorization", or selecting the Credit Card Account prior to entering the Card number, and so on. Also, you may not want to print a Receipt, or open the Drawer with every sale. This is the reason why the switch for turning the "Quick Cash Automation" on or off, is "Session Specific" switch and can be customized for each operator working on a specific station.

## Order Pad Windows

As you start a new order, you need to enter Line Item information for each item, and then at the end, enter the Payment information to complete the sale. When you select Delivery,. Wire-out or Wire-in types of sale (from Sale Type dropdown) for a given line item, all of the Line Item's information can be entered from a single form (window) we call the "Combined" form.

### The Combined Form

As mentioned above, this is the central place to enter all the order information when adding a new line item sale. The Combined Form is available for "Delivery", "Wire-in", and "Wire-out" types of sale and is activated by pressing the "Select" button on the Grid. For Pickup and Cash &Carry orders, since the required information is a lot less, the Select button performs a different function all together, where it activates the "Search Engine" instead, allowing you to quickly search and select the Inventory item.

| Type | Select | Item_id |
|---|---|---|
| Delivery | | *ARR-HI |
| Carr | | *ARR-VAS |

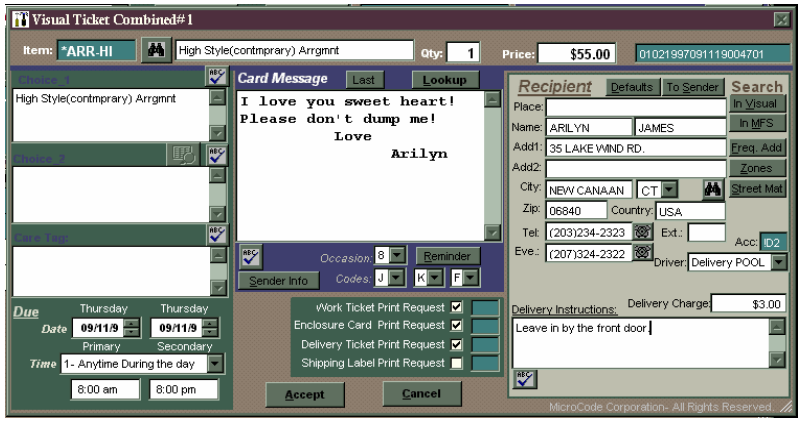
.Please note the difference in the icon of the "Select" button for Combined form, (picture of a hand pointing to a pad), versus the "Search Engine" icon (which is a picture of binoculars).

After you have selected the "Type" of line item sale, click on the "Select" button to activate the Combined form.

- Click on Search and select the Inventory item. Enter a (short) Item Description (this is the description that will print on the Statement, and Invoice) if necessary.
- Enter Item's Quantity, and Price. Use the Tab button to move from one field to another. Then continue with filling the (mini) Prep Form, the (mini) Card Form, and the (mini) Delivery Form. Please note that when entering the item Quantity and Price, you can setup the session to popup the "Quantity Check", and/or the "Price Check" windows (See Session Defaults in Appendix).

Since all this information is entered on a single form, you can Tab over (or click on) any field and change it at anytime during the order entry process on this form. The fact that all the Line Item information is entered on a single form provides the flexibility you need to make the order entry process as smooth as possible when talking to the customer on the phone, having to jump back and forth from Card Message to the Choice_1 description, to the Price, etc.

For multiple line item orders, you can click on the Select button and activate the "Combined Form" for any line item, thus quickly access the entire information, for that line item using keyboard shortcut, or mouse click.




### Wire-out

Please note that when entering Wire-out orders, after you have finished the "Combined Form", you do not have to (unless you want to) access the "Wire-out Form" (see Wire-out form below). Even if you want to finish the wire-out information (select Wire Service, Filling Florist, etc.) you should wait until you enter the Payment and Save the order first.

The basic procedure for a Wire-out sale is the same as entering a Delivery Sale, where after you finish the Combined form, you would either go to the Payment form, or add additional line items (by clicking on the Line-Item Menu button).

### Wire-in

For a Wire-in sale, you select "Wire-In" from the dropdown located on the upper left corner of the order pad. The system activates the Wire-in form first, so that you can capture Sending Florist information and the "Amount Given" for the order (see Wire-In form later in this chapter).

Once you have finished the Wire-In form, you complete the "Combined" form for the Wire-in order and then Save it. Obviously for Wire-in orders you do not need to complete the Payment form (the **Payment** button is not visible).

### Shortcuts

For the listing of all the available shortcuts on the "Combined" form, please see the corresponding shortcuts on the Prep, Card, and Delivery Forms. You can think of the Combined form as combination of a mini Prep Form, Card Form, and Delivery Form stuck together, with the same buttons and shortcuts.

For example, when covering the Delivery form below, we mention that clicking on the "Recipient" label, inserts all the information from the previous Recipient onto to the corresponding forms. The same feature is also available here on the Combined form.

Please do not confuse the "Combined Form", with the "Combined Ticket". The Combined Ticket is a "printed output" (see Print Jobs), and not an order entry form (window).

### Submitted/Processed Orders

Since the Combined form is used for entering line item information when adding the order for the first time, it is not accessible (is disabled) when the order as been "Locked" (ie Submitted, Processed, or Archived orders). To access Prep, Card or Delivery information on "Locked" orders, you need to access the Prep, Card and Delivery form individually.

The reason is due to lack of additional space needed to house the "Production and Delivery Tracking" information, so it is not well suited for order tracking / order management activities that occur after an order is submitted.

### Button Icons & Shortcuts

Please note that once the Combined form is accessed, the system automatically marks the "Prep", "Card", and "Delivery" form" buttons as "Already Accessed" (the button icons turn into pictures of Filled Folders).

In order to further facilitate "Keyboard Only" order entry, there are 6 additional shortcuts on the Combined form. These labels are titled Alt_1, Alt_2, … and Alt_6, (yellow on black). These shortcuts allow you to navigate faster and jump around while you are using the Combined Form without using your mouse. For example, instead of using repetitive Tab keys to bring the focus to the Recipient information, you can simply press Alt_5 to get there with a single shortcut.

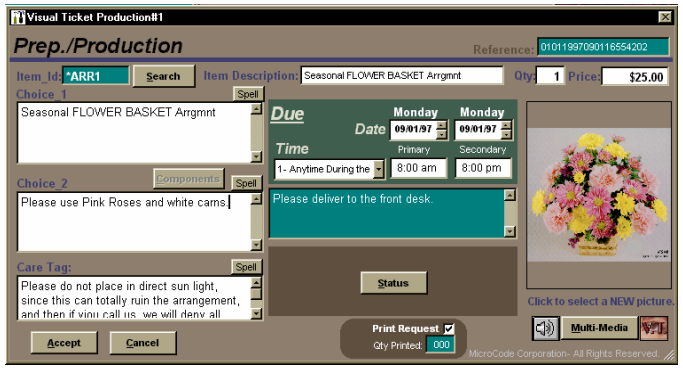
The First and Last names of the Sender are displayed on the "top right corner" of the combined form so that when speaking with the customer, the operator is reminded of the customer's identity. Of course this is a moot point, when your Desktop area is large enough to accommodate the Order Pad itself and the Combined form in a Side to Side arrangement.

As mentioned above, please note that almost everything that is covered below for the Prep, Card and Delivery forms, also apply to the Combined form, as a whole.

## The Prep Form

### Item Selection

You can search and select another item, while you are in the Prep form, by clicking the **Search** button (without having to go back to the Grid's Item_Id dropdown to select a different item).




- On the Combined or the Prep forms, the "Choice_1" field is handled with a couple of extra features. As the Default value, the Item Description is added to Choice_1. The system will then automatically update the contents of Choice_1, if/when the original item is changed. However, the description of the new item is "appended" to Choice_1, if/when you have added additional requirements / notes to Choice_1 field.
- To **repeat** the previous value that was entered for Choice_1 or Choice_2, simply click on the label "Choice_1", or "Choice_2".
- Please note that the Care Tag is printed on certain Enclosure Card templates (ie e_card1, or e_card4). See Print Job Setup in the Appendix.

- While entering the Due Date and Due Date has the focus, you can press the "Home" key on the keyboard (or Right click on the field), to activate the Calendar. Once you have select a date from the calendar, press "Escape" to close the calendar window, and transfer the selected date into the Due Date field.
- Due-Date #1 is the Primary due date that determines the status of the order (with respect to being Standby or Current). Once you enter a Date into the Due Date #1, as soon as you Tab over to the Due Date #2 field, the date in this field is updated to be same as Due Date#1. This is to ensure that Due Date #2, is never a date before Due Date #1. You can then change Due Date #2 if applicable.
- If the type of sale for the line item is "Pickup", the Prep form will allow you to enter the name of the person who is supposed to pick up the arrangement.
- If you select Wire-In or Delivery types of sale, then the Delivery Instructions is also displayed on this form. The reason is that sometimes for incoming Mercury orders, the time of delivery is mentioned in the Delivery Instructions. This will then allow you to enter the correct Time of Delivery as needed.
- The "Status" section of the Prep form is for Production Tracking purposes. While entering an order, you don't want to worry about this section.
- The Print Request on the Prep form is for printing the Work Ticket (for the Designer to make the item). For a new order the Print Request is automatically setup, based on the Session Defaults. You can remove the Print Request, if you are selling an item from the cooler So that Work Ticket is not printed). The Quantity Printed field shows the number of Work Tickets already printed for an order.

### The Picture

- The "Picture" on the "Prep" form is always initialized to the picture of the Inventory Item that as it is setup in your Inventory (under the Administration menu). But, you can always click on the picture, and select another picture file, after you have determined the customer's selection. Once a new picture is selected, it will print on the Work Order (given that you have selected a Work Ticket template that prints the picture of the item). You may want to consider using a color laser printer so that you can print your Work Tickets with pictures, in color.

## The Card Form

To activate the Card form, click on the Card button located on the Line Item grid.

- Click on the "Lookup" button to automatically insert a message from the database of canned enclosure card messages.
- There are 5 sets of these canned messages (press PageUp / PageDn to scroll). Each group can be for a different language (to be used in places such as Montreal Canada, New Mexico, where the population is bilingual).
- Please note that the Canned Message Database maybe modified as needed. Once the Selection Window is activated, Press 0 to modify contents of Canned Messages Database.
- The tiny little button labeled "L" is for repeating the "Last" enclosure card message from the previous order (useful for holidays such as Mothers Day).
- The tiny little button labeled "A" Capitalizes all the letters of the Card message.
- The tiny little button labeled "a" changes all the letters of the Card message to Lower Case.
- The tiny little button labeled "P" changes all the letters of the Card message such that the first letter of each word is capitalized.
- The Button "Add Sender's Info", is mostly used for Funeral arrangements. It automatically appends the Sender's Name, Company, Phone and Address to the bottom of the Enclosure Card message. For "General Sales" orders, only the Name and the Phone number of the Sender is added. Please keep in mind that the printable area on Enclosure Card templates is limited to just a few lines, and you want to be careful not to enter more text than can be printed.
- To Delete (erase) the entire card message, Right Click on this field.

- Please note that font used for displaying the Card Message must match the font used for printing the card (on the station that is running the Print Agent). You can setup the font by accessing Local Connections (see Appendix).
- The EC Print Request is automatically setup based on Session Defaults, and can be unchecked if applicable.
- The Occasion Type selected on this form is very important for your future marketing campaigns. Keep in mind that Micro Florist has a module that automatically generates Special Occasions entries for each customer, based on previous orders and the Occasion Type specified. This feature applies to either "Birthday" or "Anniversary" Occasion Types.

### The Picture

- Please note that you can select a picture for the Enclosure Card, and have it print on the Enclosure card template (in color, given you have a color printer), given the selected Print Job template contains picture. To select a picture, simply click on the picture itself and choose a picture file.

### ACRONYMS to the rescue!

This feature allows "Acronym Replacements" while entering the Enclosure Card Message. This is of course in addition to the existing "Canned Messages Insertion" feature already available for Enclosure Card Message.

There are two buttons on the **Combined** (and **Card**) forms, located on top of the Enclosure Card Message area.

- The button with the KEY icon is where you define your acronyms.
- The button with the HAPPY FACE icon does the actual Acronym Replacements (use Alt-X for maximum speed).

The Acronym Definition table is station specific, meaning each station (depending on it's role for order entry) has it's own custom Acronym Definition table.

When setting up the acronyms and their corresponding expansions, the system adds 10 new rows for you to use each time you open the table. The z in the first column is there only for sorting purposes (such that the new rows start below the existing rows).

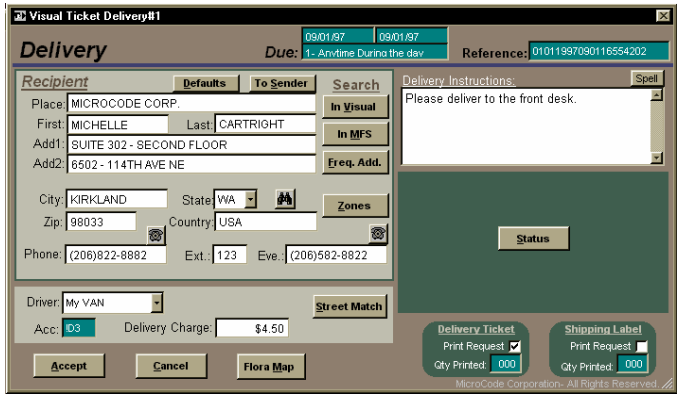
When you close the table, any row with empty Acronym (or empty Expansion) fields are automatically deleted. You can use UPPER CASE, lower case or MiXeD CaSe letters for Acronyms. It does not matter.

When defining Acronyms, be mindful of cascading effects of using acronyms that are used in other words. In these cases use a hyphen in the middle of Acronym (such as H-B instead of just HB).

To review; type in the appropriate acronym (during the holidays, most wire orders already come in, filled with acronyms), now simply press Alt-X and you're home!!

## The Delivery Form

- When entering the Recipient Address, use the "**Defaults**" button, to quickly insert the city, state, zip, and area code from Session Defaults into the corresponding fields.




- When the order is an "Account Sale", the button labeled "**To Sender**" becomes visible. Use this button to insert the customer's (ie; sender's) name, address, and phone numbers directly into the Delivery form.
- When taking a Deliver, Wire-out or Wire-in order, you should always ask the customer whether or not, s/he has placed an order for this particular Recipient before. If so, then you can use either the "**In Visual**" button (for Order Pad Database), or "**In MFS**" (for Posted Database) to lookup and update the current order with Delivery and Card information using the previous orders.
- Use the "**In Visual**" button, if the order is still in the order pad (has not yet been purged). Once you click on this button, you can lookup the Recipient either by his/her last name, first name, or company name. After you select a Recipient, the system displays the card message and asks you whether the Card

message should also be inserted. The advantage of using the "In Visual" button over the "In MFS" button is only when an order has not yet been processed (posted).

- As you know, all orders in the Order Pad Database end up in the Posted Database (ie Micro Florist System - MFS) permanent files. So, by using the "In MFS" button, you can be certain that the Recipient will be found (given that you have not archived the Micro Florist records). You can locate Recipients by sorting and doing an incremental search on last name, sender name, company name or phone number. Once you have selected a Recipient, the system will display the Card Message, allowing you to insert it into the Enclosure Card form.
- Every time you use the "To Sender", "In Visual", "In MFS", and "Customers" shortcut buttons, the "Delivery Zone" information (ie; Driver & Delivery Charge) is automatically updated based on the "zip code" (thus eliminating the need to use the additional keystrokes).
- You can always Repeat the last Recipient information (name, address and phone numbers) by simply clicking on the large "Recipient" label on the upper left corner of this form. You can repeat individual components by clicking on the field's Label. For example to repeat the first name from the previous order, click on the label "First".
- When entering the Delivery Information for a new Recipient, always keep in mind that the system already has all the addresses for large companies, hospitals, and funeral homes, just a click away under the "Freq. Address" button (see Setup Manager in Appendix). Please note that the "Freq. Address:" insertion also inserts the "Delivery Company", and the "Delivery Rate" for that delivery. This means you can have "**Discounted**" delivery rates for a particular Hospital, or Funeral Home, and by using this method, the process is completely automated.
- You can click on the tiny button with a + icon to add the current address to the Frequent Addresses Database.
- Please note that the second tiny button with a + icon on it, is for adding the Recipient to the Customer Database. Please note that the same two buttons are also available on the Combined form.
- When entering a Recipient for local a Delivery (Delivery and Wire-in orders), if you have not yet pressed any of the shortcut buttons already mentioned above, you should seriously consider using the "Zones" button. The "Delivery Zones" are setup either in the Setup Manager. When you select a "Zone", city, state, driver that is assigned to that Zone, and the Delivery Charge is inserted into the order.
- Since facilitating the entry of the Delivery Information quickly and easily is one of the important functions of a Floral POS system, the Visual Ticket offers even more shortcut buttons. - The "Zip Code Search" button allows you to automatically insert the City and State, once you enter the Zip code. But this button does more than that. It allows you to lookup suburb names, in the vicinity of a large city. More importantly, for Wire-out orders it allows you to select a zip code for a given city, when the Sender does not know the Zip code. This will speed up the selection of the Filling Florist when accessing the Florist Directory form.
- Please note that by enabling the "**Auto Zip code Insertion**" feature (setup in Session Defaults), once you have entered the City and the State, the "first" zip code for that city is automatically inserted. This will always insure that the Zip code field is not left empty, but it maybe the wrong zip code. Please see "Session Defaults" in Appendix.
- The "Auto Dialer" button can be used to automatically dial up the Recipient, by a single click (see Accessories setup in Local Connections Appendix).
- Please note that you can clear the Delivery Instructions, by right clicking on this field.
- The "Status" area of this form is for Delivery Tracking purposes. Please do not be concerned with the "Status" button on this form, during Order Entry.
- The "Flora-Map" button is for locating the Recipient address on the map of your county. Use this button, if the system is configured to run Flora-Map, and the validity of the address is in question.
- The Print Requests checkboxes for Delivery Ticket and Shipping Label are automatically setup for a new order (as they are setup Session Defaults Appendix).
- If at any time after the order is Submitted or Processed, and you need to reprint either the Delivery Ticket or the Shipping Label, click on the Delivery button to activate the Delivery form and check the corresponding Print Request checkboxes. The Print agent will detect the Print Request and will print the ticket.

## The Wire-out Form

It is recommended that during the order entry, you shouldn't worry about the Wire-out form. If you insist on completing the Florist information (by accessing the Wire-out form) from the order pad, you should do it after you have saved the order. But the preferred method is to access this form from "Wire-Out Processing Center" from the Operations menu (see Order Management Chapter).

- When entering Wire-out orders, remember to use the "Status" button on the Line Item grid, to adjust the "Amount Given to Filling Florist".

## The Wire-in Form

- When starting a Wire-in order (by specifying Wire-in from the dropdown located on upper left corner of the order form), the Wire-in form is display first (before you can access the Combined form).
- Once the Wire Service is specified and the florist's code is entered, clicking on the "Directory" button, will insert the florist information into the order.
- When "Mercury" is selected in the "Electronic" dropdown control, the order will not be reported to Wire Services.

### REC and INC Messages

- When FTD is selected as the Wire Service, and "None" is selected for "Electronic" (meaning the order has been Called-In), the REC dropdown box becomes visible on the bottom of this page (reported by Mercury agent).
- For Teleflora, called-in orders are referred to as INC messages and in turn they are reported via the Dove Agent.
- The REC dropdown box choices are "Ignore", "Report It", and "Reported".
  - Selecting "Ignore" will cause the Mercury (or Dove) agent, to ignore this order, and not report it.
  - Selecting "Report It", will cause the Mercury (or Dove) agent to transmit this message as called-in order.
  - Selecting "Reported" means you have manually entered the REC (or INC) message on the Mercury (or on the Dove), marking this order as "REC/INC Reported", and will not be transmitted.
- For Mercury Direct's REC (or Dove's INC) orders that have been Transmitted but not yet Verified, the label "Xmit" appears on top of the dropdown control (indicating a "Hanging" Rec/Inc message). By clicking on this label, you can Reset the Hanging order, flagging the Mercury (or Dove) agent to re-transmit (Xmit) the Rec/Inc message.

### Multi-Line Item Wire-In sales

All Wire-in orders are imported as a Single line item order with the "Total Amount Given" by the Sending Florist applied to the "Price" of the First line item (minus the applicable Delivery Charge which is assigned based on the Zone Definitions).

The Item_Id itself is selected by detecting the closest Key_Word of each item in the Inventory that is found in the Order's Description.

However, certain users while reviewing (or entering a called-In) Wire-In order like to break down the Wire-In order to some of it's components, by adding additional Pickup line items (to maintain Inventory counts and have the additional items be reflected in z-reports and such).

But since the "Pickup" line items that follow the Main wire-in line item, must still be considered as part of the first line item (the Wire-In line item itself), any additional items added to a Wire-In order, will automatically have the item's Price set to $0.

So, If you need to breakdown a Wire-In order to multiple Line Items for purposes of "Inventory Maintenance", having the Price equal $0 stills reduces Inventory and shows the item sales in the various Inventory reports. While more accurately reflecting the specific line item that holds the actual value of the order (Line Item #1).

It has also been reported that automatically inserting a certain Item's "Retail" price into a Wire-In order can distort the proportion of each item's value contribution in the order (since at the end a Wire-In order must be built at as a "single" order).

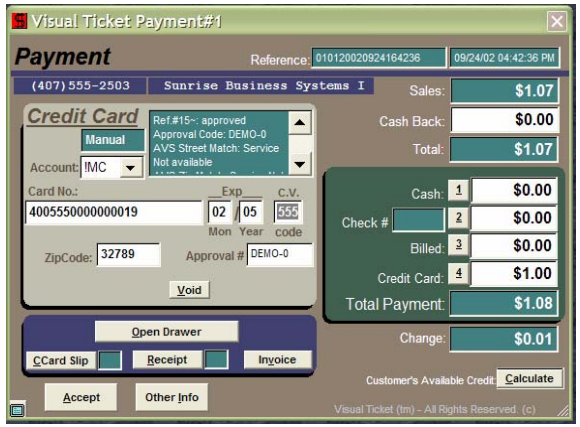
For example. when reporting the total sales for multi-line Wire-In line items, one would want like to see the entire Wire-In order amount be reflected in the wire_in line item of the order. This principal is also consistent with the Accounting Interface Module, preventing the IIF to be out of Balance when multi-line Wire-in sales are present.

## The Payment Form

This form is always "mandatory", except for wire-in orders (wire-in orders are automatically posted to the corresponding wire Account !W1, !W2, ..). The system will automatically force the visit to this form, when the amount of order is changed, or when a new customer is selected.

### Drawer and Printing

- Clicking on the "Cash Drawer" button will send the "Open Drawer" command to the "Receipt Printer" that is connected to the work-station (as defined in the Print tab of the "Local Connections" setup – See Appendix).
- Clicking on the "Invoice", "Cashier Receipt", or " "Credit Card Slip" buttons will send the corresponding print job to the printer directly from the work-station (without using the Print agent. Only Production Paperwork is handled by the Print agent).
- When printing Invoice (or the "Hardcopy", depending on Hardcopy Print Job setup), the system displays whether the Invoice_No is pre-assigned (Repeat), or a "New" Invoice_No (the sale is NOT previously invoiced). By clicking on this Status line, you can "over-ride" the existing pre-assigned Invoice number,




and thus assign a brand new Invoice_No to that sale. When you actually change the Invoice_No for a given sale, you also change the "Central Invoice Counter" and thus start a new sequence of Invoice numbers.

### The Change amount

- Always use the Payment shortcut buttons (labeled with a + sign) to insert the amount for a given method of payment. When using multiple methods of payment, the system automatically inserts the balance into the new method of payment.
- Negative amount for the "Change" field is unacceptable. You must make sure that the entire order amount is covered by the method(s) of payment.
- Important Note: When changing the order amount upwards, the amount of "Change" is decreased, and the system will "force" the operator to cover the increase by adjusting the amount for payment. However, when the amount of order is changed downwards, the amount of "Change" is increased and the system will allow this, without forcing the operator to adjust the payment (since this is an acceptable scenario). The Operator must always pay special attention to the calculated amount for the "Change" field, to insure that payment is correctly entered.

### Customer Balance & Credit Limit

- When the customer's purchase exceeds his/her Credit Limit the system will prompt the operator, asking for his/her override before the amount can be billed to the customer's account. If the operator's Access Level is below the supervisory access level (Level 1), then the system will popup the "Supervisor Override" window. The Supervisor must then come over, and physically enter the "Master Password" (As setup on the Setup Manager's Environment Setup), before the billing operation can proceed.

### Credit Card Payments

- It is important to note that when the Credit Card Authorization is forced on Standby orders, since such orders will not be posted into the Micro Florist on that day, the Micro Florist Sales Transaction report for Credit Card transactions will no longer match the nightly Settlement report.
- The CV code (technically called CCV2) has been recently added to the Payment form and can be optionally entered, right after you enter the Expiration Date. This is an important new security feature for "card-not-present" transactions, which now appears on the back of most Visa cards.

## Credit Card Type Dropdown

The credit card Type (or Account) dropdown is not visible, by default. Instead the credit card Type (or Account) is automatically selected based on the "First Digit" of the credit card#, as follows;

- Visa/Master Card First Digit = 4 or 5 Card Type (acc) = !MC
- American Express First Digit = 3 Card Type (acc) = !AE
- Discover Card First Digit = 6 Card Type (acc) = !DI
- Other Credit Cards First Digit = all else Card Type (acc) = !CO

If you still need to manually select the credit card Type (account), on the Payment form, please make sure you check the "Credit Card Type (Account) Visible" checkbox in Session Defaults (under Order Entry tab).

This way the Credit Card Account dropdown is visible and gets the focus after you enter the amount under Credit card and hit the Tab key.

The Credit Card Type dropdown matters when your Master Card / Visa deposits are made separately (by the bank) than your Amex or Discover deposits.

## Instant Approval

- Please note that these "newer" security features are only available in the Instant Approval module (not supported in Credit Card Server via ICVerify configurations).
- In Instant Approval, when Voiding (by clicking on the Void button) or a Refunding (when Credit Card amount is negative), if you ever receive the Attention message "Error 716 – Original Transaction Ref. not found", please go back to the Payment form, right click on the Credit Card Status window, and delete the contents. Then, try the authorization again.

## The CVV code

- This new feature is a three-digit code which provides a cryptographic check of the information embossed on the card. The CVV2 three-digit code is printed on the signature panel on the back of Visa cards immediately following the Visa card account number. The CVV2 code helps validate two things;
    - a) the customer has a Visa/Master Card in his/her possession, and
    - b) The card account is legitimate. CVV2 is printed only on the back of Visa cards — it is not contained in the magnetic stripe information, nor does it appear on sales receipts.
- Using the CVV2 value can help minimize the risk of unknowingly accepting a counterfeit card or being a victim of fraud, as well as reducing "Charge Backs". The results of whether or not the CVV2 code matched or not, is displayed on the Authorization Status window.
- For "Accounts Sales", the Payment form will display "Credit Card on File", when the customer has a Credit Card number in his/her profile. By seeing this notice, the Operator may inform he Customer that his/her credit card information is already on file, and that s/he may use the Credit Card, without having to look up the card.

## Now or Later?

- The Now button immediately sends the request for Credit Card authorization to the ICVerify/Gateway and the system waits to receive the response. The Later button on the other hand, schedules the Credit Card authorization to be handled by the Credit Card agent. The reasons to choose the Later button are either a) to save time, or b) to charge the card after the order becomes due.
- When the order as a whole is Standby (not yet due), pressing the "Now" button for obtaining the Credit Card authorization will activate a dialog box informing the Operator that continuing with the operation will "Force Payment" on a standby (not yet due) order.
- Obviously the preferred method in this case would be to press the "Later" button, and have the system (the Credit Card Agent) automatically obtain the Credit Card authorization, when the order actually becomes due. The Dialog box however, gives the option to go ahead and force the authorization, anyway.
- The "Later" button is not visible when "QuickCash Automation" is ON (unless you turn if off temporarily by clicking the label "QuickCash Automation ON".

## Making Zip Code Mandatory

For Credit Card sales, you have the option to make the Customer Zip Code Mandatory for processing credit cards.

- For "Account Sales", the Zip Code is automatically submitted.

- But for General and QuickCash sales, leaving the Zip Code field empty may increase your Credit Card fees / commissions (check with your Merchant Account provider).
- Thus you have the option to FORCE the operator to enter the customer Zip Code before processing the Credit Card.

To do so, please check the "**Make Zip Code Mandatory for Credit cards**" checkbox in Session Defaults "Order Entry" tab. In this case, the Customer Zip code field is included in Tab Sequence and Credit Card processing is not allowed if/when it is left blank.

### Where to begin ? (tab sequence)

When opening the Payment form, you have the option to start the Focus on:

- The Credit card shortcut button (to put the amount of sale as paid by Credit Card). or
- The Cash Amount paid by the customer.

Please note that #1 is the default behavior for the Main order pad, while #2 is the Default behavior for the QuickCash order pad.

If you want the Main Order Pad to behave like the QuickCash, then please check the: "**Focus goes to the Cash Amount**" checkbox.

Now, both the Main as well as the QuickCash order pad, once you open the Payment form, the focus goes to the Cash Amount (paid by the customer).

### What to do, what to do??!

If for any reason the Credit card processing module (Instant Approval or ICVerify) is down (due to phone line, Internet connection, Gateway issues, or whatever), you can always continue with order entry by using the "**Later**" button.

Then as soon as Credit card processing capability is back online, the Credit Card Agent will automatically process all the pending authorizations and will auto-submit the orders.

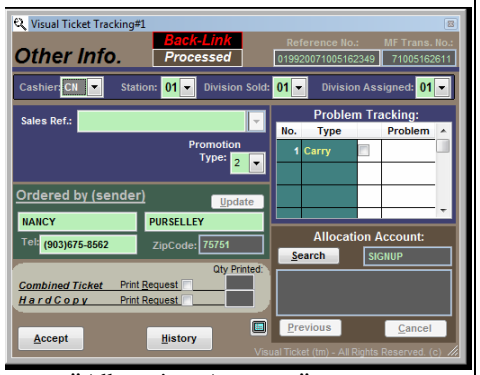
## Account Sales

- Important Note: The Customer Balance is updated when orders are posted into the Posted Database (Micro Florist) permanent records. However, the Order Pad calculates purchases over the Credit Limit based on customer's existing balance, plus any unprocessed orders in the order pad. However, customer profile parameters such as the "year-to-date purchases" and the like are updated only when the Process agent actually posts the orders. If the Process agent is running through out the day, then you can rest assure that all customer parameters are always up to date.
- For more information with respect to customer's Balance and Credit Limit, click on the button "**Calculate**" (Customer's Credit Limit) on this form.

### Sent it via email

- If the customer has an email address on file, then you'll have the option to save the "Payment on Account Receipt" (or especially the "Declined Ticket") as a "Stored Message" to be emailed to individual customers during eManager's next Build. All you have to do is to check the "**Email It**" checkbox (placed above the **Receipt** button).
- For Declined Tickets, you need to check this checkbox, before you click on the "**Now**" button.
- In case you want to Delete (erase) Stored Messages for all customers, you can go to "Customer Defaults" form in the "Business" tab of Setup Manager, and then execute "Clear all Stored Messages" button. See eManager for details.

## The Other Info Form




You should only consider using this form if you need to add tracking information to the order. Tracking information maybe division number, or problem assignments, or attaching other codes.

- This form should be made "mandatory", if you require that your operators stamp orders with their initials, assign an "Advertisement Tracking Code", assign "Sales Reference Code", or assign an "Allocation Account".

### Division No.

- The Staff_Id and the Sold Division No. controls are active, only when the "Allow staff_Id / sold division changes" checkbox has been checked in the Session Defaults (see Appendix). When an employee changes the "Staff_Id", his/her staff_Id is used for all consecutive orders (it is a "sticky" value).
- Changing the "Assigned Division" will cause the Process agent to post the order into the financial records of the selected Division (for reporting and tracking purposes).
- Please note that Production Print jobs are printed based on the "Assigned" division. In other words, if you change the Assigned Division on an order to 2, then the print jobs you have setup for Division 2 will used. This means the Production Paperwork for the order prints a different template on another printer.
- Please note that the Division name that is assigned to each Division number, is setup in the Setup Manager's "Business" tab.

### Changing the Station No.

For purposes of Balancing (or Reporting), you have the option to change the "Station #" that has been assigned to a certain order. The Station# is assigned to the order when the order is originally entered on a given Station.

In certain situations, such as Balancing of COD orders (that were entered on a certain station, but then was Paid on another station), this provision allows you to change the Station number to the station that eventually receives the money in the end.

Please note changing the Station# in the "Other Info" window is controlled by the same switch setting (in Session Defaults) that controls the changing of the Staff_Id and the "Sold Division" controls.

- To enable the Station# Dropdown in Other Info, please go to "Session Defaults" (under Setup menu), go to the "Order Entry" tab, and check the checkbox on the lower left corner: "Enable Staff_Id / Div. changes".

### Allocation Account

- Allocation Account is another Customer/Supplier/Employee in the Posted Database's (Micro Florist) Customer file.
- You can obtain a report that shows all sales that have been "Allocated" to a specific account, showing details as well as totals of all allocated sales. This feature is used for tracking Charity contributions, Donations, and Employee Commissions.
- When you enter an "Account Sale", you will notice that the "**Sender Section**" becomes visible. The purpose is that when a sale is being made to a "Company Account", but the name of the person actually ordering the sale, needs to be shown on the Statement, or on the Invoice. Pressing the "Update" button will overwrite whatever has been entered into this field, with the original Customer information.
- The "**Problem Tracking**" section maybe used to assign, and track problems on specific orders. Problems are assigned based on each Line Item of the order.
- The "**History**" button allow you to track the "Life Story" of a given order. You would know who started the order, who made changes, when it was processed, and so on. A great tool to resolve arguments among different employees with respect to who is responsible for a certain order entry action.

### Print Request

- The "Combined" ticket is a Legal size full page ticket that contains Invoice, Work Ticket, Delivery Ticket, and the Enclosure Card all on the same perforated form. The Combined ticket can contain up to 3 line items. Please see Print Job setup in Appendix.

# Account Sales

As mentioned earlier, most shops setup the Session Defaults setting for Account Sales versus General Sale, such that all new orders are added as "Account Sale". This is due to the fact that entering an Account Sale is not really that much more effort, than entering a "General Sale".

For "General Sale" you need to enter customer's first and last names, and his/her phone number anyway. You also need to add the zip code (in the Payment form), if the customer is planning to use Credit Card to pay for the sale. So, the only additional field that must be entered for an "Account Sale" is the address, since the City and State are also automatically inserted, when you use the "Zip code Search" button.

So, it is imperative that we cover the most efficient method of entering an "Account Sale" in this section. However, based on whether or not you are using the Caller-Id Interface, the methods will vary.

## Account Sale with Caller-Id

Having the Caller-Id Interface, makes a big difference in the number of keystrokes necessary to enter an "Account Sale". Once you have opened the order pad, and the Caller-Id Interface is activated, the following sequence of events will allow you to add the order: You can open the Caller-Id Interface from the File menu.

- The phone rings. You will notice the Caller-Id Interface showing the number (and the name, if your telephone Service supports it) of the caller. Click on the "New Order" button on the order pad toolbar to start a new order. You will then click on the Select button for the line you want to pickup.
- If the customer is already in the Customer Database, then the customer information is automatically added to the order, and you are done with this portion of the order. If the customer is not in the database, the system will automatically popup the Customer Profile form, put it into "New" customer mode, and insert the Account_Id into the form. So, all that there is left to do, is to enter the customer name and address, click on "Save" button, and then exit the Customer form.

## Account Sale with the Account Dropdown box

The Account_Id dropdown may or may not be visible based on the size of your customer database. Since at the time you are reading this, you may have just started using the system, this is a moot point. You may want to read the following paragraph when it becomes relevant.

As is mentioned in the Session Defaults Appendix, depending on the number of customers in your customer database, the "Account_Id" dropdown box is either available (for quantity of customers less than 3000 to 4000), or it is not (when the Customer Database is larger). This is due to the fact that the Account_Id dropdown box for large number of customers, will slowdown the loading of the order pad. However, with faster and faster hardware and networks, the impact of larger customer file is becoming less significant.

Assuming the Account_Id dropdown is visible, here are the steps to enter an account sale, using the Account_Id dropdown.

- Click on the "New Order" button on the order pad toolbar to start a new order.
- Click on the Account_Id dropdown box., moving the focus to this field. Press the "Backspace" button to clear the field for adding a new value.
- Enter the Account_Id into the Account_Id dropdown box. Please note that this control provides you with "Incremental Search" capability (meaning as you enter numbers into this field, it will display the first Account_Id in the database that matches the numbers added so far). If the system finds the Account_Id as you enter the numbers, then you are done, and can continue with the rest of the order.
- When you have entered the 10 digits, press the "Enter" key. If a match was not found in the database, the system will prompt you "Would you like to add customer ?". You would enter "Yes", and the system pops up the Customer Profile form, in "New" customer mode, with Account_Id already inserted into

the form. So, all that there is left to do, is to enter the customer name and address, click on "Save", and then exit the Customer form.

### Account Sale - w/Large Customer Database

When the "Account_Id" dropdown box is unavailable, you may use the following procedure to locate/add a new customer.

- Click on the "New Order" button on the order pad toolbar to start a new order.
- Click on the "Customers" button to activate the Customer Profile form.
- If the Customer does not remember his/her Account_Id, and is not sure whether or not s/he has called before. The "Search" button already has the focus, so press "Enter", and locate the customer.

### Account_Id is NOT known

- If, the Customer is not found in the Database you may use Fuzzy Search capabilities to find the customer (click the "Must Find!" button and see Search Engine Chapter for details on Fuzzy Search technology).
- Then close the Search Engine, and click on "New" button on the toolbar, and add the customer information. Then click on the "Save" button, and then exit the Customer form.

### Account_Id is known

- If the Customer remembers his/her Account_Id, Tab over to the Account_Id field. Enter the Account_Id. If, the Account_Id is not in the database, then the system prompts you to add it. Add the customer information. Then Click on "Save", and then exit the Customer form

As you can tell, having the Caller-Id Interface (whether the Account_Id dropdown box is available or not) saves 2 steps.

## Additional tips on Account Sales

The "Search" button that is available on the Order Pad, is for a fast and quick search in the Customer Database, without the need to popup the Customer Profile form.

### Personalized Service

It is strongly recommended that the Customer form is always accessed during order entry. This will allow you to provide a more "personalized" service, since you will be able to view Customer Preferences (usually entered into the Customer Memo field), or click on the "Occasions" button to review Customer's upcoming Special Occasions. You can suggest ideas for the upcoming occasions based on customer preferences you have entered in the Memo field.

This is what personalized service really means. To differentiate your shops from supermarkets or the even other flower shops, you need to make the commitment to use the tools at your disposal. If you don't use it, it won't help.

- Please note: you don't have to be adding Special Occasions for every customer in order for the "Occasions" button to useful. After one year of using the system, you can have the Micro Florist automatically add special occasions for occasion codes 3 (Birthdays) and 7. (Anniversaries) automatically .

### Reseller Certifications

Another very useful application for using the Occasions Reminder feature has nothing to do with birthdays and anniversaries !!. But it has to do with the expiration of customers' "Reseller Certification" (for the No Sales Tax accounts).

Some local governments now require that retail shops to maintain a valid copy of Customer's Reseller Certification, before offering wholesale (no sales tax) status to their customers.

These certifications usually run out on an annual basis. Setting these expiration dates for each account in the Occasion Reminder module allows you to remind customers to provide you with their most recent Reseller Certification. Imagine how much easier your jobs becomes when you use either the Mail Merge Power Module to mail, or to use the eManager to email, such notices.

For additional information on the "Customer" form, see the Administration Chapter later in this handbook.

## Default Customer Account

It is highly recommended that you add a new customer account with the following attributes:

Account Id: ---------- (10 dashes)

First Name: Do Not Use Last Name: Do Not Use

You may enter anything you like for address, city, state and zip (it doesn't matter). Now access the "Setup" button for this account and enter Credit Limit: $0 (zero) so that the Billing option in Payment window is disabled..

Since the Account Id of this customer is 10 dashes, this account will always be at the top of the customer file. The purpose of this account is that Visual Ticket will always select this account when adding a new Account Sale order. Having the First and Last Name of "Do Not Use" will remind the operator to select another customer (just in case s/he forgets). The Credit Limit of zero, insures that the operator will not be able to bill the "Default Customer".

### The Alternate Top Of File Account

Visual Ticket also recognizes the Account_Id of 0000000000 as the special "TOP OF FILE" (Default) Account and will not allow the operator to change or delete this account from the Customer Administration page.

It also always automatically changes the First Name, Last name and the Company name to "DO NOT USE". Which will prevent the system from saving any Account Sale order with Customer Account Id of: 0000000000 as well.

### How to over-ride system protections:

For Manager Access Level 4, you may over-ride the above protections and still change the Customer Info for the Account Id of: 000000000 (or 10 dashes) using the Master Password.

However, the only way to Delete the special "Top of the File" Account_Id is to use the Power Module # 10 (Account ID Changer / Merger) to first change the Account_Id from 0000000000 to something else and then Delete it from the Customer Admin page.

### The Billing Option

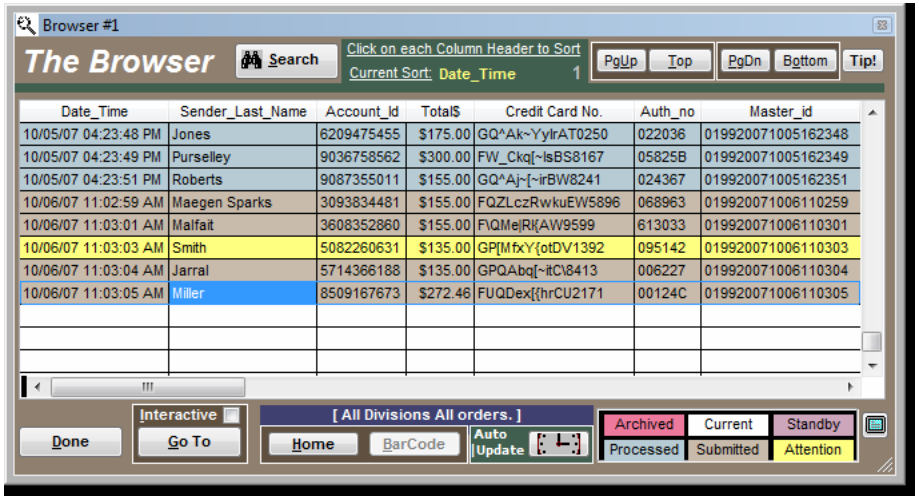
Once you uncheck the "**Bill this Customer?**" checkbox in the Setup form on Customer's Profile, the option to BILL the customer in the Payment window will also no longer be available.

This switch controls whether or not the customer can be BILLED, as well as whether or not the customer is included in Billing sessions.

So, as far as the Payment window is concerned, turning off the "**Bill This Customer?**" checkbox (in Customer profile) acts the same as setting the customer Credit Limit to ZERO. However, customer with zero Credit Limits, are still going to be included in Billing Sessions, given they have a previous balance.

## The Browser Utility

The **Browser** is the window into the Order Pad Database. It allows you to visually see the status of orders, navigate through them, sort the orders by any column, and once you have located an order that you like to inspect closely, you can actually "**Go To**" that order.




The Browse allows you to view orders in relation with other orders, a then go to a specific order, based on the status of that order. A perfect tool for performing "Order Pad Inspection" at the end of the day (see Order Management Chapter).

- You can activate the Browser by click on the **Browser** button located on the Order Pad Toolbar (right next to the **Exit** button). This is a very powerful utility designed to give you the "Big Picture" view of the Order Pad, and navigate in it.
- While the "**Super Search**" button (also located on the Order Pad Toolbar) allows you to locate Specific orders, based on sender name, customer Account_Id, or the credit card number, etc., the **Browser** on the other hand helps you locate the order by taking you to the vicinity of that order (a more right brained spatial searching, than the more rigid left brained Super Search).

## Color Coded Order Status

Order Color Code are similar to the colors of various types of order on the order pad itself. For example;

- White — Current (saved but not Submitted).
- Light Brown: — Current and Submitted.
- Cyan: — Processed (Posted).
- Burgundy : — Processed and Archived.
- Yellow: — Needs Attention.
- Pink: — Standby (Future)

The map of Color Codes is displayed at the bottom of the Browser.

## Locating Orders

### Locate by Sorting

The first column on the Brower with the header Date Time (each order's time stamp) is the Default Sort, when you open the Browser.

You can sort orders by different columns, by simply clicking on the each column's Header. This you can sort orders by:

- Date and Time of order.
- Sender Last Name
- Account_Id (phone #) of the customer. All General Sales (including Quick Cash) with empty Account_Id, will be on top).
- Total $$$.
- Credit Card number (You can see how many times a particular Credit Card has been used, and by who?).
- Authorization number (Approval Code) or Check Number..
- Master Id. Group orders by Division, Station, and Date/Time of entry. (see below).
- Sale Reference number (selected on the Other Info form). See Sales Reference number in Order Management Chapter -4.
- Micro Florist Time Stamp. Which is the date/time when the Process agent Posted the order into the Posted Database. This is the same Time Stamp used for Billing, printing Posted Sales reports, or looking at Customer History.

### Locate by Selecting

The Select Menu is a very powerful Filtering utility that allows you to Zero-In on a certain category of orders based on their status.

The Browser follows the filtering criteria you have selected from the "Select Menu". In other words, if you have selected "Attention Orders", then the Browser will only show orders that need attention.

However, once you have a Filtering Criteria active, the Browser will first ask you whether you want the Browser to follow that filtering criteria, or not ?.

Once you have told the Browser to maintain the current filtering in effect, the column sorting will no longer be available.

Use the "Select" menu to select (or Filter for) a certain group of orders, such as;

- This Station's Only, This Division's Only, All Divisions
- Attention orders, Future orders, Current Orders.
- Specific Filter Criteria.

Then once you have selected the specific subset of order(s), click on the Browser button to ONLY see those orders listed.

### Where is Home?!

The "Home" button on the Browser allows you to go back to (or locate) the original order (you were on), before you activated the Browser and possibly went to other orders in the process. So, the term "Home" here refers to "where you were", before you moved.

Once you click the "Home" button the Browser goes to the Home order on the List of orders on the Browser. Then you can click the "Go To" button to load the original order.

### What is Master_Id ?

Master_Id is a set of 18 numbers consisting of:

Division No. + Station No. + Date + Time.

As a result it is the ONLY truly unique identifier of an order across multiple stations and divisions in a network. Here is an example;

01 01 - 2004 09 01 - 12 34 56

Master_Id = 010120040901123456

The master_id is also used to create a 20 number Unique Identifier for each line item. It's called Trans_Id and is the master_id plus the sub-sale number of 01 thru 99. So for example, the third line item on the above order will have:

Trans_Id = 01012004090112345603

## Moving around..

The buttons on the top of the Browser allow you to make Big Jumps with single clicks. If you have hundreds or thousands of orders in the Order pad Database, you can see the move through the entire order pad database, by just a few clicks on the "Next-100" button. Please note that these navigation buttons follow the current sorting of the Browser. This means for example, when the "Sender Last Name" is the active Sort column, the "Go Top" button takes you to the top last name sorted alphabetically (most like an empty last name).

Another method to quickly browse through the entire Order Pad database, is to click on the column you want the orders to be sorted on, and then just press and hold down the "Down Arrow" key.

### Going to an order

Once you have located an order that you want to inspect closer, you may click on the "Go to" button and the Browser will pull up the order in the background.

If you are among the financially privileged class, than your 20" computer monitor will allow you to keep the Browser open, but out of the way, so that you can have both the Browser and the Order pad, open side by side, without one blocking the other.

The "Interactive" checkbox is a toggle switch that establishes a link between the Browser and the Order Pad (behind it, or next to it). It pushes your system's CPU to the max, by locating and updating the Order Pad with each order, as you click on each line on the Browser (eliminating the need to click on "Go to" button each time).

## The Auto-Update Mode

The "Auto-Update" feature updates the status of the Browser ONCE PER SECOND, displaying the LATEST status of the orders in the Order Pad (across the network and from ALL stations).

- To turn ON the Auto-Update mode, simply click the little button with the "Timer" Icon.
- To turn OFF the Auto-Update mode, simply click the little button with the "Stop" Icon.

With the "Auto-Update" mode turned on, you can sit and watch as the new orders are added, or the existing orders change status.

# Repeating Orders

The Visual Ticket system provides many different methods for repeating previous orders. These methods follow:

## Repeat using Copy button

This is the simplest form of repeating an order. It mostly applies when you are entering orders, and want to repeat them similar orders to save time. All the information in the order (with respect to the line items, delivery, card, wire, and payment) is copied. The source order maybe "General Sale", "Account Sale", or "Wire-in Sale".

Or for example, when a customer calls and you use the "Super Search" button to locate the "Source" order.

Once you are on the Source order (the order that you want to copy), you would click on the "Copy" button on the Order Pad Toolbar, and the system creates the new order and allows you to modify and then save it.

The only limitation of this method is that it uses the Order Pad Database, for the source of the original order. As described in Chapter -1, Archived orders in the Order Pad Database are usually purged after 60, 90, or 120 days (depending on your Purge Parameter), so if the source order in question is not a recent order, then you would need to use the "Repeat a Posted Sales" method instead.

### Copy for Repeat or Refund ?

When you are in the Order Pad, clicking on the "Copy" button that is located on the Order Pad's Toolbar, now offers you the following options:

- Copy to Repeat (default)
- Copy to Refund (new)
- Cancel

The first option of "Copy to Repeat" is of course the classic definition of making a copy to Repeat an order.

The 2nd option however, automatically changes all the Quantities to Minus, all the Service Charges and Delivery Charges to Minus, thus allowing you to easily REFUND the order.

## Repeat with Line Item option

This method also uses Order Pad database (as opposed to long-term Posted Database) as the "Source" of orders. One of the advantages of entering all your orders as "Account Sale" is the ability to repeat previous orders item by item. So, the main advantage of this method is the fact that you can select "individual" line items to be copied to the new (target) order.

Locate the "source" order using the Super Search or the Browser, click on "Last Order" button (located in the Customer area of the order pad), and the system displays the first order in the order pad by that customer.

You can use the VCR (ie Next, Previous, First and Last) buttons on the Toolbar to go to the next/previous order for this customer. Once you have located the order you want to copy, click on the checkbox next to each line item that you want included, and then click on the "Confirm" button to create the new order with the Line Items you specified.

The same limitation for orders that are older than the Purge period, also applies here.

## Repeat Posted Sale

Once the Order Pad orders are posted into the Posted Database (Micro Florist's) permanent records (by the Process agent), these posted sales transactions are maybe viewed and repeated using the "Posted Sales" form. The Posted Sales form is accessible;

- From the Order Pad itself. When you select an Account Sale, the little button labeled "Repeat" appears in the Customer area of the order pad. Click on this button, and the "Posted Sales" form displays only the Posted Sales transactions that belong to the specific customer that is selected on the Order Pad at the time.
- From the Customer Profile (available from the Administration menu). Click the History button, and then click on the button labeled "Sales". The "Posted Sales" form displays the selected customer's posted sales, only.
- From the Administration menu select "Posted Sales". In this mode the "Posted Sales" form displays all. Posted Sales transactions including both "Account Sales", as well as "General Sales" (which include QuickCash orders), and "Wire-ins".

The "Posted Sales" form contains a grid where each column displays an important attribute of each sale. You can click on an individual row to select a specific sales transaction.

The click action itself opens up a "Browse" window showing the line item information of the selected sale. You can also open the Browse windows by pressing "Spacebar" while tabbing through the different fields.

The line item Browse windows also display Totals, Sales Tax, GST, the method of Payment, etc. The "sub-sale" (browse) window displays additional information regarding each line item. For example, the Delivery table provides the additional information regarding the Recipient and the Card message.

You can also view the Inventory table for additional information on the item, and the Customer table for viewing the details of the Customer Profile. Please note that while in any of these "Browse" windows, pressing Ctrl-F let you find specific information.

The buttons on top of the Posted Sales form provide fast movement through the Post Sales transactions. The button labeled "Search" activated the "Visual Search Engine" allowing you to perform incremental search on Recipient records. Posted Sales transactions appearing on this form are color coded for easier identification.

However, the real power of this form lies under the two buttons labeled "Repeat" and "Delete:.

The Repeat button which is our subject of discussion here, repeats a Posted Sale (maybe from 3 years ago), right into the Order Pad with complete Sender information, line items, production, delivery and even wire information. As well the method of payment.

## Repeat Templates

This is by far the most powerful means of repeating your "Frequent" orders. Meaning, you can save a typical wedding order, or a Bar Mitzvah order as a template and then use this method to have the basic skeleton of the order repeated as the "Starting Point". You can then modify the sale to reflect the customer order, before you save it.

So, to take advantage of this method, the original order must have been saved as a template. Once the template is created, the template will remain as long as you don't delete it. In other words, the Repeat ability no longer depends on whether or not the original order has been purged (so it is somewhat permanent).

The "Template Repeat" method copies all the information on the order (with respect to the line Items, delivery, card, wire, and payment). The order maybe a "General Sale", "Account Sale", or "Wire-in".

Once the template is generated, it can be used to automatically create "Standing Orders" (orders that repeat automatically on certain dates). So, Standing orders are "Template Based Repeat" copies of a given order template, that are generated by the Daily agent, on the day they becomes due.

In order to repeat an order using this method, find the original order using the Super Search or Browser, click on the "Template" button on the toolbar (w/icon of a clock). The system creates the "Template" for the order. You can name the template with any name that you believe would make it easier to locate it at a later date. You can also assign a few keywords, to facilitate locating the order.

To repeat the order, from the Operations menu, select "Standing Orders Templates". Click on the "Templates" button. The Visual Search Engine is activated, display all existing templates. Locate the "Template" in question using the template's and use a few keywords for better identification. The "template" is then displayed on the "Template Management" form where you can click on the "Generate" button to repeat the order.

Again, we strongly recommend that you use this method for repeating "frequently placed" orders.

## Repeat Recipient

"Recipient Repeat" refers to copying the Recipient information and the Card message from previous orders. When repeating the Recipient information, then obviously the Sender name, method of payment, or wire information is not relevant.

The advantage of using the "Recipient Repeat" method is that the same Recipient maybe used by different senders. For example, when a famous person is deceased, the Recipient information can be repeated for different Senders, sending flowers for the deceased.

In order to repeat Recipient information, start the order, select the item and then click on the Delivery button for Delivery form (or the Select button for the Combined form), where you will be able to locate the two "In Visual", and "In MFS" buttons.

### Recipients in VT

Clicking on the "In Visual" uses the Order Pad Database with the Search Engine activated on the Delivery file, allowing you to locate the Recipient based on First Name, Last Name, or Company Name. Once the Recipient is selected, you have the option to also insert the Enclosure Card message.

Here you can select from orders that have not yet been Processed (ie today's orders). But not from orders older than your Purge parameter.

### Recipients in MFS

Clicking on the "In MFS" uses long term Posted Database for finding the Recipient, where you can select orders from months (if not years) ago, but not for same day orders (unless the Process agent is setup to launch and run every hour).

## Station vs. Default Tax Rates

Visual Ticket maintains local "Station Tax Rate" on each station, based on the tax rate of the last order entered on that station (when the Tax Rate is changed to a rate that is different than the Default Shop Rate).

The "Station Tax Rate" gets its new value from the last change you made to the "Tax Rate" dropdown (on any order from that station). The Tax Rate you end up selecting for an order, becomes that station's "Station Tax Rate" until it is changed again. This important feature is to accommodate branch stores (or departments) located in areas with different Tax Jurisdiction (or sell Products with different Tax Rates) than the Main Shop's Default Tax Rate. The Tax Rate dropdown shows the rate in RED when different than the Default Shop Rate.

As a result, when the station's local Tax rate is different than the Default Shop Rate, adding a new customer the system prompts the operator to select either the "Station Tax Rate" or the "Default Tax Rate" for customer profile setting.

You can also revert the "Station Tax Rate" back to the "Default Shop Rate", when you add a new customer and after you select the Default Tax Rate for the customer's profile. At this point you are asked;

- "Change Station Tax Rate of xx% to Default Shop Rate of yy% ?".

If you answer YES, the Station Tax Rate reverts back to the Default Shop Rate and the above question to select different tax rates, is no longer repeated when adding new customers..

# Chapter 4

**Recommended read for:**
1) The System Manager
2) The Financial Manager

# Order Management

## Order Status

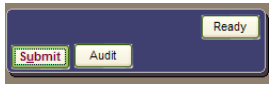
Having the orders change status and moved from the one database (Order Pad) to another (Posted) is not because it is fun to have a colorful order pad! It is because having all the orders always remain the same forever would be a nightmare to manage.

Managing the Order Status, especially at the end of the day, before you do the Balance Utility and then the Server Shutdown, is an important responsibility of the System Manager. When the Browser is opened at the end of the day, you need to make sure there is nothing pending, if you can help it.

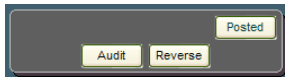
### Life Cycle of an order

The life cycle of an order can be summarized as follows:

- Order is created by clicking on the "New" button on the Toolbar. Order is "In Edit order".
- Order is completed, and saved (Saved order).




- If the order's due date is in the future (based on the value of the Standby Parameter), then the order is categorized as "Standby order". The "Standby Parameter" determines when a future order is to be considered as "Standby" by the system, and is setup in Setup Manager's "Processing Parameters" section.
- If the order is "Due", but not yet "Ready" (either not Paid, or not yet Transmitted if wire-out), then the order is considered "Work In Progress" by the system. The "Submit" button is not visible on such orders, until such time when the order is made "Ready". So, the Work-In-Progress orders can not yet be Submitted.
- The Credit Card Agent may process some unpaid orders from previous days to make them Paid. The Dove, or Mercury agents may transmit wire-out orders, in order to make them Ready. But as soon as the order is "Ready", then it can then be submitted to become "Submitted order".
- Once an order is "Submitted" then it can no longer be changed, unless it is "Un-Submitted" (the clicking the circular arrow button where the Submit button used to be).
- Submitted orders are then picked up by the Print Agent to produces the production paperwork. This allows the production can begin. The Process Agent picks up those Submitted orders and sends them over the wall to the Posted database for long-term safe keeping.
- Once the order is posted into long term Posted Database, it is labeled "Processed order". Processed (or Posted) orders can not be changed, unless they are "Reversed" (un-posted). To Reverse a Processed order, click on "Reverse" button on the upper right corner of the order pad.




- Order remains as "Processed", until the Daily Agent converts it into an Archived order. This happens after so many days, as setup by the "Archive Parameter". Once an order is labeled as "Archived", it can no longer be changed (or Reversed), unless first it is "Un-Archived". Archiving is an extra level of security, before orders are purged.
- Archived orders hang around for another 60, 90, 120 days (as setup by the "Purge Parameter"), before they are purged (Purged order) by the Daily Agent.
- This recycling process keeps the Order Pad database manageable. Remember, at the end of each day, somebody needs to use the Order Pad Status Review utility and the Browser, to make sure there are no Pending orders (before running the Server Shutdown for the night).

### Processing Parameters

Processing Parameters specify how the Daily agent updates order status, and are setup in the Setup Manager (accessed from the Visual Ticket Setup menu).

#### Standby Parameter

Using zero (the default value) for this parameter will stamp any order that is due tomorrow and beyond as "Standby". Standby orders are not printed, or processed until they become due.

If you enter 7 for this parameter, all orders that are due with the next week, become due today.

When an order becomes due, the Daily agent changes it's status from Standby to "Current" first thing in the morning, the Credit Card agent runs the credit card (if the Later button was pressed in the Payment form), and then once it is paid, the Print agent prints it, and at the end of the day it is posted by the Process agent. So, if an order is billed, the customer account is debited and the invoice for the sale will print, the next time you run the Billing module. So, as you can tell, this is a very important parameter.

If you are leaning towards increasing your Standby Parameter, so that you get more visibility on future order requirements, then you may want to reconsider that decision, since everything you need to know about "what's coming up?" with respect to future orders is available from the Planning (for Material Requirements or MRP) reports in the Report Launcher. You don't need to print all the Work tickets for next week, to find out what is coming up next week. Even if you need to have a copy of the order to place your bins, use the HardCopy print job, instead.

However, after all this, if you still prefer to handle all your own Order Staging (scheduling orders using the bins on your workroom walls, for example), then you may want to consider entering 999 for the Standby parameter. This way, there will not be any Standby orders in your order pad, and the order for next year's Christmas will print and process today. In any case, you can try it one for a while, and always fine tune it, as you move forward.

### Archive Parameter

Using 7 (default value) for this parameter converts "Processed" orders into "Archived" orders after 7 days from the date the order was processed.

Archived orders are one level before being "Purged". Archived orders can not be Reversed/Voided (un-posted), like Processed orders can. The Archived stage offers an additional level of security (locking the order) and is the very final stage in the life of an order.

If you increase the Archive Parameter to 30 days, it allows the Processed orders to hang around by an additional 30 days, before they are turned into Archived orders, which means you are also push the purging out by the same number of days.

### Purge Parameter

Using 60 (default value) for this parameter will purge "Archived" orders after 60 days from the date they were "Processed" (and not from the date they were entered).

Please note that Purging orders does not mean, all the information about those orders are lost. Once an order is processed, the order is posted into the Posted Database (Micro Florist's) permanent records. These orders can be looked up, copied, and printed again and again using Posted Sales Forms and Reports.

The point is that Archived orders on the order pad have already performed what they were supposed to do, and now they are just a shadow of the man they used to be! There is no point in crowding up the order pad, slowing down the system response time, for orders that are already available in Posted Database (Micro Florist) long term files.

Usually the 60, 90 or 120 days should be enough time after which you no longer need to print Production Paper work, or track "Problems" on the orders that old. So, don't get carried away, and choose this number wisely.

### Standing Order Lead Time

Allows the system to generate your Standing orders and put them into the order pad, say 5 days in advance of their Scheduled Date. Please see Standing Orders in Chapter-4 for details.

## Auto-Submit Orders

In order for the Process Agent and the Print Agent to act on an order, the order needs to be Submitted. The Daily Agent runs every morning, and extracts orders that become due on each day, removing their Standby stamp. If this box is checked, the Daily Agent will also automatically Submit these order that have become due. You can only determine, whether this is appropriate for your shop.

The Auto-Submit feature also applies to the Credit Card, the Mercury, and the Dove agents. The Credit Card agent for example, will automatically Submit any order that the credit card is approved.

The Mercury and Dove agents will automatically Submit any paid wire-out order that has been successfully transmitted and verified.

### Halt Processing

Usually, if there is a problem during processing, the Process agent will stamp the order with an Attention flag with the nature of the problem explained on the Attention Message.

If you check this box, the processing of problem orders halts the Process agent requiring operator input before it can continue to next order. This is useful when you need to track a specific problem, and what to know right a way, if the problem has been resolved. So, you can turn it on/off as needed.

## Status Conversions

As an order goes through it's different life stages, you can convert it back one level at each stage, to reverse it's aging process by one stage (in case you need to make changes). Starting from the last stage of an order and going backwards:

- A "**Purged**" order is already deleted and the original order in the Order Pad Database is gone (unless you created a "Template" of the order). However, since a "Purged" order used to be a "Processed" order, then and as such, the order is always available in Posted Database (Micro Florist's) permanent records. You can always look up Purged order in the Posted Database by using;
  - Posted Sales Reports in the Report Launcher (available on Visual Ticket File menu).
  - Delivery Tickets selection from the Cash Register menu of the Micro Florist.
  - Locate Delete Sales selection from the Cash Register menu of the Micro Florist.
- An "**Archived**" order maybe rolled back to a "Processed" order, by simply clicking on the "Archived" button (see upper right corner of the order pad).

### Voided vs. Reversed

- A "**Processed**" is Submitted order that now has a counterpart in the Posted Sales Database. So, as such it can be rolled back to Submitted order in two way;
  - The Posted sale transaction is Voided (Deleted).
  - The Posted sale transaction is Reversed (a Refund order with all negative amounts is generated to cancel the original posted sales transaction – This method maintains Audit Trail (history) of what went on with the order.

So, in order to un-process a sale, click on the "Reverse" button and you are presented with the above two choices. Click on Yes to Reverse, and on No to Void.

- If you click Yes to Reverse the order, then the Process agent runs creating the new "equal but negative" order. If the Process Agent is not available on that station (was not purchased), the order changes color, and is labeled "Reversed" so that it is the Process agent picks it up the next time it runs (during Server Shutdown).
- If you click No, the system pulls up the "Posted Sales Form" with the posted sale in question listed on the grid. Click the Delete button to Void (delete) the sale.

Once the Posted Sales Transaction part of the order is taken care of (either Voided or Reversed), the order itself is left on the order pad un-submitted. At this point you decide whether to get rid of it all together (by clicking the "Delete" button on the Order Pad Toolbar), or to change it and submit it back, as a modified order.

For example, if the amount of a wire-out order that sent out 3 days ago, is somehow changed, and maintaining the Audit Trail is not necessary, then need to:

- Find the Processed order for it, click on Reverse, click on No (to Void the posted sale). Once the order is un-submitted on the order pad, change the amount and re-submit it. The order will process later.

In summary, when reversing an order, the original order is not deleted, but another order with the opposite amount is posted into the Posted Database (Micro Florist) records. This will insure full audit trail, causing Reversed (Refund) transactions to show up on customer invoices, statements, and all Posted Sales reports. Once the order is Reversed by the Process agent it becomes a "un-submitted" order, with an Attention Flag. The Attention message states "This Order has been Reversed". At this point the order can either be Deleted, or changed and then re-submitted.

### When to Void or Reverse ?

Void or Reverse a Processed sale only when the order either needs to be deleted (customer cancels the order) or the amount of order has changed.

However, if only the card message, the order description (Choice_1, or Choice_2), the delivery instructions, etc (changes with no financial impact), have changed, you make these changes to the Processed or Archived order, and simply re-print the appropriate tickets.

If you insist on updating the Processed order in Micro Florist, use the **Delivery Ticket** selection on the Cash Register menu, and press **F3** to modify the order..

### Voiding and AIM

If you are using the Accounting Interface Module (AIM) for QuickBooks Interface, Voiding (deleting) Posted Transactions will NOT be reflected in the AIM's output file.

When you Void (or Delete) a Posted Sale, the record is simply deleted, in the time period you have already done a Build for. This is why it is CRITICAL that you always Reverse orders, so that the negative transaction generated is posted into today's IIF, in order to cancel out the original transaction.

## Status Conversions (Cont.)

- A "Submitted" order can be "un-submitted" by simply clicking on the "**Undo**" button (a circular arrow located where the **Submit** button used to be).

  Un-submitting an order makes the order Editable again. You can also delete a "Submitted" order with no impact on (long term) Posted Database (Micro Florist) files, since the order has not yet even been processed by the Process agent. So, any order can be un-submitted and changed at anytime during the day.

  This is mainly the advantage of NOT running the Process agent on an hourly basis thru out the day (so orders don't get posted), but what you lose, is the Shop Loading Data and updated customer balances.

  Shop Loading (traffic) information is saved into Posted Sales database when Process agent processes orders, each hour and assigns Date/Time stamp to each order. This valuable information is then analyzed and graphed by the Power Module #7. (See Shop Loading Analysis).

- A "Saved" order can be made into "In-Edit" order by simply changing any field that would then require saving again. You may also delete a "Saved" order with no impact on long term Posted Database (Micro Florist).
- An "In-Edit" order can be undone, by simply clicking on the "**Undo**" button on the order pad Toolbar (circular arrow). If you have just started the order, it will be deleted, if you are modifying an existing order, the order will be returned to it's original state.

## Crediting a Credit Card Sales

There are different ways to Credit a Credit Card sale. The first method works in ALL circumstances. Here's a quick step by step procedure;

- Open order pad and go to the **Browser** and find the order. Click on the **Copy** button (on the Toolbar) to make a copy of the order. Change the Quantity, Delivery and Service Charge amounts to minus numbers. Go to Payment form and update the "Paid by Credit Card" amount, and click on the Now button to process the Refund.
- Other methods;
  - If the batch is not yet closed (settled), just go to the Payment form and click on the "**Void**" button.
  - If the order is Archived, click on the **Archive** button to change it to Processed. If the order is a Processed order, click on the Reverse button. You are given the option to either Reverse (create a negative order to off set the original) or Delete the Posted Sale. Select "Reverse" and the system prompts you to process the Refund on the Credit Card.
  - If you use the Accounting Interface Module AIM), you must always Reverse (and not Delete) the Posted Sale. This is due to the fact that "deleted" posted sales do not post into the AIM.
- In either case, you MUST always check the Settlement Report and verify that all the necessary refunds/credits have been posted properly. You can also use the Gateway (or ICVerify) Virtual Terminal to individually Delete credit card transactions from the Batch, before you settle (close) it.

## Canceling a Wire-In order

If the cancelled wire-in order is not yet processed, then click on the **Delete** button (on the Toolbar) to get rid of it. But if the cancelled wire-in order has been Processed, then;

- Find the order on the Browser and go to the order.
- Click on the **Reverse** button. Click **Yes** to select Reversal (vs. Delete). The reversal is posted (by the Process agent for stations that have the Process agent feature). An equal but minus order is posted to cancel out the original order, maintaining audit trail, which is transferred to the AIM (Accounting Interface Module).
- Back in Visual Ticket, the order is left as un-submitted order, waiting for your next decision.
  - If the order is totally cancelled, the click on the Delete button on the toolbar to get rid of it.
  - If the order is changed, make the necessary changes and resubmit the order as a brand new order that will posted later during server shutdown.

# Time Stamps

Time stamp is a unique identifier of each order and it consists of:

Year + Month + Day + Hour + Minutes + Seconds

Each order has TWO different Time Stamps:

- The Order Pad Time Stamp. Which is Date and Time the order was ENTERED (appears on the "middle center" of the Order Pad):
- The Posting Time Stamp. Which is the Date and Time the order was Processed (Posted) into the Posted Database (by the Process Agent).

The Posted Time Stamps of today's orders would most likely be ONE SECOND apart from one another, since that is how the Process Agent posts the orders into Posted Database to insure a Unique Time Stamp for each order.

When in the Balance Utility, or printing Order Pad Sales Reports, use the Order Pad Time Stamp for selection criteria and inclusion into reports.

When in Billing, or printing Posted Reports, use the Posting Time Stamp for the selection criteria and inclusion into reports..

## Over-written Orders

While in the order pad, if you forget to click on the "**New Order**" button before staring a new order, then instead of adding a NEW order you will be modifying an EXISTING order.

The operator maybe more susceptible to making such mistake when the "current" order on the order pad is not yet Submitted (such as a wire-out order that is pending Transmit & Verify).

Please note that in this case, the order always maintains its original Time Stamp. This if the original order (that was modified) was entered on previous days, then the modified order is not going be included on the Balance Utility or the "Order Pad Transaction Reports".

## The History Button

Always check the "**History**" button located at the bottom of the "Other Info" form to see the complete "History" of a given order (who/what has changed the order). The History window displays date/time of each Save, the Staff_Id, the order amount, as well as any agents that may have worked the order.

# Flags

Orders can be grouped together by two different Flags, namely the Attention flag and the Audit flag. The main reason for doing so is usually because some later action needs to be taken on them (they are considered "Pending" orders). The Attention flag affects the way system "handles" the order, while the Audit flag has no such effect and is used for Filtering purposes only.

### Attention Flag

The "Attention Flag" is raised by clicking on the "**Attention**" button (the button with a Hand icon) on the order pad Toolbar. You may also enter a short "Attention Message" to describe the reason for requiring attention.

Attention flag means, the order is put on hold until someone does something about it. For example, all incoming orders via Wire Service Systems (such as Mercury, Bloomlink or Dove), or via the VOX agent (order from your website) are imported with their Attention flag already raised. Once an order has its Attention flag raised, the Print agent will not print the Production Paperwork (order can not be "Filled"), and the Process agent will not process (post) that order.

### Resetting Time Stamp

When removing the Attention Flag the system lets you Reset the Time Stamp (so that the order is counted as Today's business in Balance Utility and Order Pad Reports). This does not apply to Wire-In orders, orders entered today (with today's Time Stamp), and "locked" orders such as Submitted, Processed and Archived orders.

The order Time Stamp (in the Visual Ticket order pad) is used in the Balance Utility and Order Pad Reports. It has nothing to do with the "Posted Time Stamp" (when the order gets processed), since an order with Attention flag does not get posted (processed) anyway.

### [ ON-HOLD] order status.

The Attention flag tracks orders that require "immediate attention" while the **On-Hold** flag on the other hand represents orders that are On-Hold (and do not require attention). In order to put an order On-Hold such that the order can no longer be Submitted or be updated for Production / Delivery tracking.

- Click the "**Hold**" button that is located right above the "**Submit**" button. Clicking the button will add the string: "[ ON-HOLD ]" to the order's **Notes**.
- Clicking it again, removes the [ ON-HOLD ] string.
- When the order is On-Hold the button's caption reads "**Un-Hold**" (meaning clicking it reverses the "Hold" status to "Not-Hold")

Then as long as the order's Notes contains the words "[ ON-HOLD ]", the order can not be Submitted (which means the Print Agent will not print the Production Tickets, and the Process Agent will not Process the order).

Also, for any order that is **[ON_HOLD]** the Production / Delivery status of order is blocked off. Which means during Production / Delivery Tracking operations, you won't be able to update the "Times" for Production / Delivery of the order's line items.

This will flag the Designers NOT to produce the order, and for the Drivers NOT to deliver the order. Orders that are on-hold will have the Red [ON_HOLD] stamp on top of the window.

The Print Agent will not print Production Tickets (Works Tickets, Delivery Tickets. etc.) for On-Hold orders (unless the "Print Production Tickets regardless of Order Status" is checked in Environment Setup Page 2, see VT News 4/5/08 for details).

The Dove, Mercury and BloomNet Agents no longer transmit Wire-Out orders when the order is [ON-HOLD].

To remove the [ ON-HOLD ] status, you may either click the "**Hold**" button again, or just remove the words [ ON-HOLD ] in the order's Notes. Please note the "**Hold**" button is visible only on Un-Locked orders (not submitted or processed).

- However, you can ALWAYS force any locked (ie Submitted, Processed, or Archived) order to go on-hold, by simply typing [ ON-HOLD ] in the Notes field. You must type it in upper case and with proper spacing.

The Hold button is not available in Novice mode.

Here is an example for using the "On-Hold" status for an order; You have received a Wire-In order that is far below what the order description calls for (that doesn't happen much, or does it ?!).

You want to remove the Attention flag so that while you are trying to contact the other shop, the order doesn't keep popping up as requiring your immediate attention. You also don't want the order to be made and be delivered in the mean time.

So, once you remove the Attention flag, click the "**Hold**" button so that it can no longer be Submitted or be updated for Production or Delivery tracking.

### Audit Flag

The Audit "**Flag**" button is located on the status section of the order pad, and is always available to be clicked. The Flag button is just a "Selection Tool", and once clicked, the caption of the button changes to "**Flagged**".

Now, you can always Filter for such orders with their Audit Flags raised, to be included (or excluded) on the Browser or in many of the order pad Sales Reports available from the Report Launcher.

You can also select (filter) orders based on their "Audit Flag" by going to the "**Select**" menu, click on "Select Utility", activate the "**Status**" section, and then click on "Orders flagged for Audit" checkbox. Now when you activate the "Browser", you will only see those orders that have been "Flagged for Audit". The main purpose for this particular functionality is to give you the ability to

Group certain set of orders for later viewing, changing or deleting, without invoking the above Attention Flag status.

In other words, the "Audit" button is more like the second means of setting the Attention Flag on certain orders, except that with "Flagged for Audit" printing or processing of the order is not affected. So it is sort of like "Lite Attention Flag" !

## Line Item Serial No.

This 5 digit reference number called "Line Item Serial #" can be added to any of your Production Tickets allowing you to "quickly" locate those orders using only the 5 digits number.

The "Line Item Serial #" starts from 00001 and goes up to 99999 and then resets itself back to 00001. It appears on all of the Line Item forms of the Order Pad such as the Combine form, the Deliv form, the Perp form, the Card form, the Status form, the Wire-out and the Wire-in forms and is located on the top right corner of each form (right next to the Trans_Id field).

In order to locate an order with a specific "Line Item Serial #" click "Super Search" (on the Order Pad's Toolbar) and then click the button "3 Search by: Serial #" in the "Items" section of the Super Search.

Please note Line Item Serial# have already been assigned to most of it not all existing orders on the Order Pad. However in order to add this field to your own User Defined Templates, please copy and paste another Text Field and then right click on the new field, go to Properties, and change the expression to:

vitems.ser_no

### Reassigning the Line numbers

When performing massive line item deletions, additions, and / or repeat on certain complicated multi-line orders. the Order Pad does a pretty good job in automatically keeping up with the Line Item Sequence Number re-assignments, as you do these things in real time.

However if for any reason , you notice the line items show something like 1, 2, 3, 5, 6 (missing the #4 in between), simply double-click the "No" column header to immediately re-assign the Line numbers.

Double Click (instead of a Single click) is used so that the feature doesn't get in the way, with accidental clicks on the gird, during order entry.

# Pre-Printing Production Tickets

Up to this point, we have insisted that Production Tickets (Work Tickets, Delivery Tickets, Enclosure cards and Shipping Labels) should only be printed under tight controls and only for "Submitted" (Due and Paid).orders centrally by the Print Agent. Please note that "Submitted" orders imply the order is Due, it is Paid and is Approved to be filled / shipped.

However, based on requests from our user base, you can actually print Production Tickets ahead of time, for any order (with or without Print Request).

## Via the Print Agent (regardless of Order Status)

Using this option you can over-ride Visual Ticket's strict requirement of Production Tickets are only printed for Submitted orders, and have the Print Agent print any order that has be flagged to be printed by the Operator, instead.

To enable this option, please go to the Setup Manager, go to Environment Setup, go to Page-2 and check

- "Print orders regardless of order status" checkbox.

Obviously, doing so removes a very important operational criteria that Production Tickets (such as the Work Ticket) are considered as the "Authorization to Ship" document, always insuring that orders are Due, Paid and Submitted before they are allowed to be shipped (or Delivered). Bypassing this criteria removes a very important "Check & Balance" mechanism from your overall operations.

In order to tell the Print Agent that you are finished with entering the order (so that tickets are not printed while you are still working on them), after you Save the order, you need to click on the "Print" button (right next to Submit button). (This is the same as the "Flag" button when this option is not Enabled).

The "Print" button turns into "Done" once it is clicked, telling the Print Agent the order is now ready to be printed (acting kind of like the Submit button). So, as long as the button reads "Print", the Print Agent access is blocked. Once you click it and the button caption reads "Done", the Print Agent access is allowed.

- Using this option is NOT recommended for most operations.

### From the Report Launcher

Using the report entitled: MRP6 - Production Tickets (pre-print for planning). Once you select this "Report" from the Report Launcher, you are presented with the following menu;

- Work Tickets
- Delivery Tickets
- Enclosure Cards
- Shipping Labels
- Cancel

Pre-printing Production Tickets does not alter the status of Print Request setting on the order, but it does advance the "Qty Printed" counter. In other words, the Print Agent would still print the Ticket when it is time.

Pre-printing Production Tickets requires Supervisor Password (override) to make sure "Premature" and "Unauthorized" Production Tickets are not floating around the shop during busy Holidays.

Printing each ticket require the "Print Job Setup" (for each Division) be setup on the Station. So the safest station would be the station that runs the Print Agent (usually the VT Server)

In the Floral and Gift industry it is a common practice to take phone orders for arrangements, boutonnieres, baskets, etc., over the phone for a later pickup by the customer in person. Depending on the price of the item, and the future potential for follow up business, you may choose one of the following two methods to handle such scenarios.

## Handling COD Orders

In the Floral and Gift industry it is a common practice to take phone orders for arrangements, boutonnieres, baskets, etc., over the phone for a later pickup by the customer in person. Depending on the price of the item, and the future potential for follow up business, you may choose one of the following two methods to handle such scenarios.

### COD By Billing

More appropriate for higher value items with higher probability of future orders coming from the customer. In this case;

- Use Account Sale and add the customer with appropriate Credit Limit.
- Enter the sale as Pickup order. Enter the payment as "Billed". Save and submit the order. System prints word ticket, and processes the order.
- Customer picks up the order and makes the payment. You would enter the payment as "Payment on Account".

For the same day pickup, the customer balance reflects a negative amount until it is offset by the sale amount later during Server Shutdown (when the sale is processed and posted by the Process agent).

### COD By Payment

Appropriate for small items picked up by persons who would probably not order additional items in the future (such as Boutonnieres during Graduation season).

- Enter a Pickup order (you may remove the Work Ticket Print Request).
- Enter the payment as paid by "Check", but make sure you type COD for the Check Number (you may also use COD1234 or 12COD34, etc.).
- Upon closing the Payment form the system prompts the Operator to print a Hardcopy (as the preliminary Work ticket), and then adds the "[ ON-HOLD ]" flag to the order (to stop submitting, printing, and processing of the order).
- Once the customer comes in to pickup his/her order, search the Order Pad and locate the order. Remove the [ ON-HOLD ] status. Update the Payment form based on the customer's choice of payment. Save and submit the order.
- When removing the [ ON-HOLD ] flag the system lets you Reset the order's Time Stamp so that the order is counted as Today's Business (your option).

### Balance Utility Considerations

In order to accommodate "COD Payment" transactions, the Balance Utility recognizes the word "COD" in the Check Number and provides the following additional facilities;

- The Balance Utility displays the sum of all the regular Checks (with and without "COD" in check number) in the "Sales" row, and all the COD payments in a separate field underneath it (in the Change / Cash Back / COD row). The NET amount for Checks deducts the COD payments and is used for calculating the Calculated Balances. This is because COD payments are virtual payments pending the "actual" payment.
- The "Recon" (Reconcile) menu provides you with a selection for listing and reconciling the COD payments by themselves.
- The Balance Report (available by clicking the button with Print icon) and the Z-Report both show the "Total Checks" and the "Total COD" amounts similarly in two separate fields.
- The "Bank Deposit Slip" for checks button (the button with Print icon next to the Count Cash button) does not mix the COD payments with regular checks (it only prints "checks" that do not have the word "COD" in the Check number field).

# Handling Wire Orders

## Wire-Out Processing Center

Before a Wire-out order can be submitted, it needs to be "Transmitted and Verified" either by Calling out the on the phone, or sending via Wire Service systems such as Dove or Mercury.

As it was mentioned in the Order Entry section of this handbook, the Wire button on Wireout orders need not be accessed during order entry (while talking to the Customer).

- The proper way of processing wire-out orders, is to access this utility every so often, and assign the Filling Florist, and call them out. This "job" (processing wire-out orders) is usually done by the Manager / Supervisor in the office, where it is nice and quiet so the Manager can select the "right" shops, and for call-out orders, negotiate the transaction at best price and quality.
- In case of Electronic Transmissions (such as Mercury and Dove orders), you can manage order XMIT and VERIFY status, from this utility as well. So, this is the place to be for processing wire-out orders.

Please note that the terminology "processing" used here in this section refers to

taking care of the wire-out orders and not "processing" orders with respect to posting them into Posted Database.

You simply start from the top order and click on the "Select" button. The Wireout form for that order opens up. The form is pretty self explanatory. Obviously, the first step is to assign the Wire Service that you would like to use to send the order with. The system always defaults to the last wire service used.

### Changing the Amount Given

As soon as you open this form, all wire-out orders that need to be "Assigned" are listed. The "Go to" button allows you to locate the order on the Order Pad, so that you can change it, if need be (with respect to the "Amount Given" to the florist which is available under Line item "Status" button").

### Auto-Select

Auto-Select is a feature by which the system recommends Wire-Service based on a pre-assigned quota.

The first thing we need to do in order to "process" a wire-out order is to decide on which wire service to use for sending out the order. If you have not yet activated the "Auto-Select" feature in the Setup Manager's Wire Service Setup, then the "Auto-Select" button will not be visible.

In this case, simply dropdown the "Wire Service" dropdown control (or press Alt + Down Arrow), and select a Wire Service. However, if the Auto-Select button is visible, by clicking on this button (or pressing Alt+S) the system will recommend a wire service based on the selection criteria you have specified in "Auto-Select" setup, and the volume of wire orders registered in the system.

Please note that the volume of wire orders used for the "Auto-Select" feature is registered during the processing of orders (by the "Process Agent").

Please note that once you select the wire service recommended by the Auto-Select Utility, the corresponding "Transmit Via" is also automatically selected.

## Shop Assignment

In this step, you use the Florist Directory Lookup feature to assign the Filling Florist to each order.

As soon as you select the Wire Service, you tab over to the "Directory" button. Click (or press Enter) and the Directory form pops up, it performs a Search in the Master Florist Directory, and locates the first shop serving the zip code and city of the recipient of the order.

### Directory Lookup (Shop Search)

With the search results "Color Coded" the Directory Lookup utility provides a more "Visual" effect by showing the City and Zip Code matches in Green.

Also, a "Preferred" shop is highlighted in Yellow and a "Blocked" shop is represented in Red.

- You can select FTD, Teleflora, Bloomlink or ALL wire services directly from the "Wire Option" box.
- You can select Sort by: City, Zip or Shop Code directly from the "Sort Option" box.
- You can click on the "Search by City" or "Search by Zip" buttons at any time, to change the search emphasis from "City Name" to "Zip Code", and visa versa.
- You can check the "Prefer" or the "Blocked": checkboxes directly on the grid, and see the shop color coded where a "Preferred" shop is highlighted in Yellow and a "Blocked" shop is highlighted in Red.
- The Mercury (or Dove) status indicators are highlighted in color Red, when a shop is lacking the service.
- You can alter the "Sent" (Wire-out) or the "Received (Wire-in) Counters (for each shop), directly on the grid.
- You can alter (modify) each shop's phone and fax numbers, and the "Comments" field by clicking on the "Edit" button (w/ the Pencil icon).
- The order's "Delivery Instructions" show up on the upper right corner of the Directory Lookup utility, when it is not blank.

It is important that the City, State, and the Zip codes are correctly spelled and entered. In case the customer does not know the Recipient's zip code, use the "Zip code lookup" utility, to select a valid zip code for that city. Once the first florist is located, you can move up/down on the grid to select another shop in Recipient's area.

When a "City" or "Zip Code" match is found, the color of the "city" or "Zip code" field changes to Green. The ideal search result is obviously when both City and Zip have matched.

Usually, if you are searching for a shop in a large enough city, and the system gives you that message, it usually means you have misspelled the city.

### Browse the Directory

When in the "Browse" window, you'll see shops with matching City and Zip listed as "Main Listing" (meaning the shop is physically located in the same city and zip that the Recipient is).

When you move to a Florist with the same City, but a different Zip code, it means that the shop maybe "Also Serving:" that area.

You can use another shop with a different wire service from the Directory Lookup and the Wire Service for the order is automatically updated to your new selection.

### Preferred / Blocked Shops

You can tag preferred shops as "Preferred" and shops you don't want to do business with as "Blocked". While calling out the order and talking to the florist you may decide that you would like to continue doing business with that shop. Simply click the "Preferred" dropdown box, and fag the shop as preferred. If you decided, you should never call this shop again, mark the record as "Blocked".

Once you have done that, then you can always locate a "Preferred" shops in that serving area.

If your system is setup for Auto-Dialer, you can click on the "Auto Dial" shortcuts and have the system dialup the Florist's phone number.

### Editing the Directory

Press the "edit" button to modify the florist information in the Master Directory. Please note that whatever changes you make, will be over-written the next time you update your Florist Directories. The only fields that will carry forward to the next Directory file is the "Quantity Sent", "Quantity Received", the "Preferred" and the "Blocked" flags.

Click on the "Accept" button, the Directory Lookup form closes and the Filling Florist information is inserted into the Wire form. At this point you can tab over to the "Processing" area of the Wire form and select the method of: "Transmission".

## Search by Product Codifications

Visual Ticket's Master Florist Directory does NOT contain any Wire Service Product Codifications / Promotions (due to huge file size requirements), as a result, you may use the Dove (or Mercury) Directory Lookup to locate a shop based on the Product Codifications and then use the Shop Code, to assign the Filling Florist in Visual Ticket.

The "Search By Shop Code" button that is available on the Wireout form facilitates populating Shop info from shop code, retrieved from Dove or Mercury. This feature is especially useful when you need to locate a shop based on the Wire Service "Product Codifications". Here is the general procedure;

- Minimize VT window. Search Dove (or Mercury) database to locate a shop based on "Product Codification" Once you locate a shop, Copy (or note) the shop code.
- Back to VT window, on the Wireout form enter (or paste) the shop code into the Shop Code field and click the new "Search" button (located right next to the Florist Shop code field).
- The Directory form locates the Shop based on Shop Code and populates the Wireout form (so you don't have to enter Shop Name, Phone#, City, etc..).

For most efficient use of this feature, we recommend assigning shops using the "Wireout Processing Center" (from the Operations menu) on a computer that also runs the Dove (or Mercury) software.

## Calling out the order

Select "None" if you are "Calling Out" the order. When you select "None" all the fields with respect to Electronic Transmission go away. In this case, you can click on the "Relay Info" button to view the whole order, so you can talk about it with the other florist. You can click on any area of the Relay Info Pint Preview, and zoom into that area (if your screen is not big enough to show the entire form).

Now, if you have already assigned the Florist Shop, but have not yet had the chance to actually pick up the phone and call out the order, you can always get the list of orders that you have already assigned the Florist information, but require the "Contact" name, simply click on the " Calling out, Xmit, Verify ".

Once you have finished the call, enter the Contact name which tells the system the order has been called out.

If you leave the contact name blank, the order will remain as "Not Yet Called Out". After entering the Contact name notice the "Called out" checkbox gets checked.

Click on "Accept" button to close the wire form and the order disappears from the list, since it is now "processed".

### Mercury Direct / Dove Transmissions

When in Directory Lookup form, you need to locate shops that have Mercury / Dove respectively. You may use the Mercury, FTO (or Dove) **Search** buttons to locate a shop with these systems.

Once you have assigned the shop, select Mercury / Dove from the **Electronic** dropdown box. The contents of this dropdown box are "sticky" values, meaning it always parks on the last selection.

As soon as Mercury is selected, the **Mercury Priority** box is displayed. When sending the order via Mercury, leave the contact field empty. The Mercury Sequence number will be placed in this field, once the order is transmitted. The same is true for Dove.

Mercury / Dove agents bypass orders that have not yet been paid (Credit Card is not yet been authorized).

The Mercury/Dove wire-out transmissions have two steps.

- In the first cycle, the Mercury / Dove agent, picks up "Paid" wire-out orders, as soon as Filling Florist information is complete, and is sent via the agent, pending verification. At this stage, if you look at the Wire-out form, you will notice the "**Xmit**" (Transmitted) checkbox is checked but the "**Verified**" is not.
- After a few moments the next cycle begins, the Mercury / Dove receives the Verification from the headquarters and you will notice the Printer starts printing the orders that have been verified. Once the incoming Verifications are translated and processed, you will now notice the "**Verified**" checkbox is checked with the field labeled "**Verification**" has all the details with respect to when the order was verified. If "Auto-Submit" is turned on in Setup Manager, the order is also submitted.

The order is obviously is not a "Submitted" order, since it is not yet "Ready" to be submitted. Before an order can become "Ready", it must have the Xmit (Transmit) and Verify stamps.

To summarize, while take the order, you do not access the Wire form (unless you must). From the Wire-Out Processing Center utility, you select the order, click on the "Directory" button, and assign a Florist.

Once that is done, the Mercury / Dove agents will do their thing. The order is sent to FTD/Teleflora, the verification is received, the order is submitted, and then it gets processed when Process agent runs.

So if you have Dove or Mercury, once you have assigned the florist, you really don't have to do anything else. Unless there is a problem (see next section).

### Modify Florist Info.

The Wire-out processing Center allows you to

- Assign Filling Florists, and
- Manage the Calling out, or the electronic Transmission of Wire-out orders.
- Modify the Florist Info.

Once you select **Modify the Florist Info** option ALL wire-out orders are listed and available for selection allowing you to view and manage ALL wire-out orders centrally, including orders for which you have completed step 1 (assigning the Filling Florist) and step 2 (calling out or transmitting the order).

- Please note that "Florist Info" may NOT be changed for Submitted, Processed, or Archived orders.

However, for "Submitted" order, you are provided with the option to Un-submit the order (so that the Florist information can be changed).

Please note that when the order has been Called out (or Transmitted), you would need to uncheck the **Called Out** (or **Transmitted**) checkbox in order to change the Florist Code. Then depending on whether or not, you want to resend the order, you would need to change the Called Out (or Transmitted) checkbox accordingly.

For Processed (or Archived) orders, the Back-Link feature lets you change the Order Pad and Posted Sales records simultaneously. Just make sure Back-Link is turned ON in Session Defaults (**Order Entry** tab).

## Wire System Sequence Tracking

For incoming orders via Mercury, Dove, or Bloomlink, you can quickly determine the last Sequence Number, and insure that there are no gaps between Mercury, Dove or Bloomlink sequence numbers.

This utility is available under the **Admin** menu by selecting **Wire Services Management**. Once you select it from the menu, you will be prompted to select

Mercury, Dove, Bloomlink, None (phone orders), or Exit from a dropdown list. Once you make your selection, hit the <Enter> key to select it.

For Mercury, Dove and Bloomlink, the utility will list all wire-ins orders for the last 3 days (today, yesterday, and day before yesterday), sorted by the Contact (Sequence Number) field in Descending order. So, the bottom line will be the last (most recent) Sequence number.

If you select "None", the browse window will list all Incoming Phone Orders for the last 3 days, sorted by the Contact name.

If you select Exit, the operation is cancelled and you will be returned to the Visual Ticket Main menu.

## Managing Divisions

For Multi-shop installations (via Terminal Services implementation), managing Order Transfers between divisions and Filtering for the specific orders each division is responsible for, is an important requirement and to meet that need, the Visual Ticket offers the "Select menu".

Since the Assigned Division selection (on the "Other Info") form determines the Printers (and thus the Location) at which the Print Jobs for that Division (or Branch) are printed, the ability to filter orders for specific a Sold vs. Assigned Division, becomes an important Order management tool.

### The Select Menu

The "Select" menu allows you to FILTER orders based on their Division / Staff / Station scope as well as the order Status (Needs Attention, Future orders, etc.).

When the Order Pad is NOT open, the "Select" menu launches the "Browser" utility with the Filtering criteria you have specified from the Select menu. You can then select an order and click "Go to" button to open the Order Pad and go directly to that order.

#### Auto-Update (Timer)

With the built-in TIMER (ie; Automatic Update) available on the Browser (the button with the Click icon), you can select "Need Attention" from the "Select" menu, which opens the Browser with only the "Need Attention" orders.

Now, if you click on the "Automatic Update" (Timer) button, the Browser automatically updates the list of orders every 10 seconds allowing you to MONITOR (catch) orders that "need attention" by glancing at the Browser every once in a while.

This is especially important feature for monitoring orders that have received BloomNet's new "Shop-To-Shop" messages (such as Price Change, Inquiry, Cancellation, etc.).

#### Specifying Default Selections

You can specify the Default Scope of orders on the order pad by going to the "Order Entry" tab of the Session Defaults and selecting one of the following selection criteria. This would then restrict the accessing of the orders to ONLY those orders (on the Browser and Super Search utilities) when you open the order pad. As an example, lets assume you are on a Station with Default Division = 02 (one of the Branch stores), you can restrict access to orders by;

- Sold Division = '02'

  (limits the scope to orders SOLD by Division 02 – (Function key F4).

- Assigned Division = '02'

  (limits the scope to orders ASSIGNED to Division 02- (Function Key F5).

- Sold OR Assigned Division = '02'

  (limits the scope to orders to either SOLD or ASSIGNED to Division 02

  Function key F6)

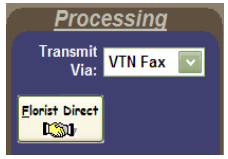
You can either set these criteria as the "Default Scope" (via Session Defaults) or as "Temporary Scope" (active until you Close the order pad) via the Select menu.

To speed up the Scope selection, remember to use the "Function Keys" assigned to the Select menu (that's if the station's keyboard is not reprogrammed ).

Once you access the "Other Info" form and assign an order to be filled at another location (by changing the Assigned Division), you can then view the status of Print Jobs by the button with a Printer (or a + sign) icon (located on the Upper Center of the order pad) and then by clicking it, you can add or remove Print Jobs as necessary.

# VT Networking Services

This is an alternate means of sending wire-out orders. If you are not interested, you may skip this section.




## Florist Direct tm

Introducing "VT Networking Services" for sending Direct wire-out orders from shop to shop.

According to the dictionary, "Networking" is defined as; exchange of services or information among individual or groups.... and that is exactly what you can do (and do it "automatically") with the shops that you have "Direct Order" arrangement, using VT Networking Services.

"Florist Direct tm" is the term we use for sending wire-out orders Directly to (Filling) Florists, by using your credit card, this avoiding wire service commissions. As a result, The "VT Networking Service" is a "Paid Service" for sending wire-out orders directly to a group of florist in the VTN directory.

The VTN Directory is like the other wire service directories that you download periodically and is maintained by the Visual Ticket Support staff.

Visual Ticket's Florist Direct allows you to setup your Credit Card information, the "Split" percentage (usually 70% - 30%), and then it handles all the rest. It is like a "wire service" except, with no commissions. The savings doesn't stop there. The "Florist Direct" (or VT Net) service also gives you the option to ask one or more shops in the vicinity, to offer you their LOWEST Bid. The Bidding starts from 20% below your split (of say 70%-30%) guideline and stops at the maximum you setup.

The new VTN Directory is especially useful for Florist Associations, certain Floral Partnerships or Franchisee groups. This means while you save yourself the Wire Service commissions, but by adding shops that are in your association to the VTN Directory, you will also be bringing them additional business from other VT Net users.

### It's a Paid Service

The VTN Directory is maintained by Visual Ticket Support team and gets it's participating shops from VT users like yourself. The VTN Directory gets another member every time you send a VTN order to another shop that you like to add as your "Direct Order Associate" list. The new listings are automatically uploaded to the "Master VTN" directory during Server Shutdown.

Once a shop is added to the VTN Directory, then all VT Users can also send "Direct Orders" to those shops.

Florist Direct (or VT Net) is a "Paid Service" initially starting at 50 cents/order with minimum of only 50 orders a month. That is $25 per month, regardless of how many faxes is sent on each order. This is the fee we (at Visual Ticket Support) charge for offering the "Florist Direct tm" feature set, the service itself, and for maintaining the Master VTN Directory. Special rates for larger associations maybe negotiated.

### Find a VTN Florist

We start the VTN Directory with just a few VT users that belong to a franchise groups such as Flowerama and Floral Associations. Yes, coverage could be a problem but the strength of VTN concept is that, not having a florist in the recipient's zip code does not stop the process. All that needs to be done is to initiate the coverage by adding an associate in that area to the directory.

You can easily lookup a florist in a given zip code, click on the "Florist Direct" button, and you're there. The order is sent and the florist is added to the VTN Master Directory.

Our survey indicates that "short staffed / busy shops", or "any shop during busy holidays", would probably opt using the Mercury, or the Dove agents to send the orders out, as quickly as possible. However there are those slower days when a few minutes spent on waiting for a "Confirmation" (or a "Bid"), isn't really going to be that critical. Especially when you can spend just a few minutes more on each order, and in return save a significant portion of the cost (of your wire-out business). That is "real" money that goes directly to the button line. The system makes it so easy to do. Just a few clicks, the fax is sent out, and a few minutes later, bid or the confirmation come in, and the "Final" order is faxed. That's all there is to it.

### It is for Internal Use

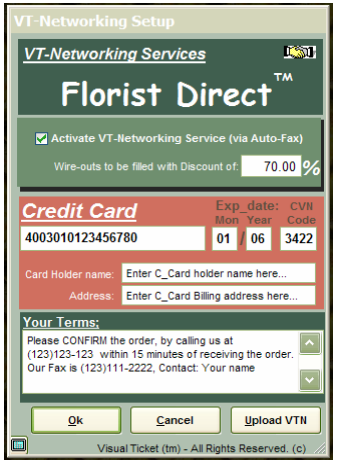
It is important to note that VT Net does NOT intend to become another wire service, or to compete with any wire service. We only offer this service "internally" for our own customers (VT users such as yourself) and your "associates", who have agreed to fill your "Direct" orders.

We strongly recommend that you do not use wire service directories to select the shops and especially refrain from using wire service product codes. For example, If you have already selected a florist from a wire service directory, don't just

change the wire service to VTN and keep the florist information. We recommend that you close the form and reopen it, so that the shop information is cleared.

As VT users upload their proposed VTN participants / associates, the Visual Ticket Support team will periodically download, organize, check for duplicates and maintain the "Master VTN Directory" on Visual Ticket servers for your next download. Hopefully the list grows and coverage increases, as time goes on.

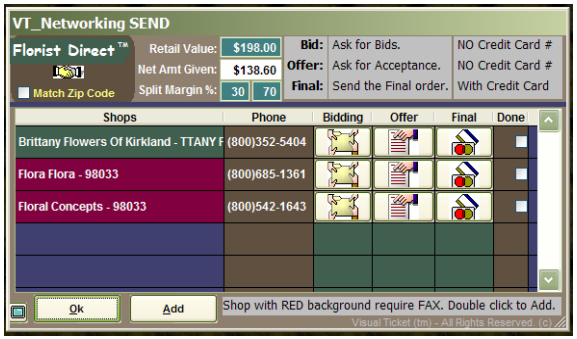
## VT Net Setup




Here's a step by step procedure to setup VT Net's "Florist Direct tm" feature;

- First thing is to install (or setup) "Fax" capability on your computer(s). If you are running Windows XP then you are in luck since the system already comes with a Fax driver already installed. All you have to do is to activate it. To do that, from Windows "Start" menu, go to "Settings", and then click on "Printers and Faxes". Double click on "Fax" and follow the prompts.
- If you are not using Windows XP, you may or may not have a Fax driver installed. Regardless, you can always install a 3rd part fax driver, such as "WinFax". Look for it in Google.
- On each station, go to Local Connections, go to Print Job Access, and click on "Florist Direct" button, Make sure, w_out2 is selected for template, and the Printer is set to the Fax driver we talked about above. Also make sure "Output" is set to "Preview".
- From the Setup menu, select Setup Manager, go to Business tab and click on "Florist Direct" button. Activate the service, and enter your Credit Card information and review the "Terms" at the bottom of the form. Also, set the "default split" percentage.
- While in the Setup Manager, go to "Florist Directory Files" and click on "Download". This will download and index the new VTN Directory.
- To Review the list in (or delete shops from) the Florist Direct "Upload File", click on "Upload VTN" button, select "Yes" to Review the list. Locate the shop(s) you want to delete, press Ctrl-T to delete the record. Press Escape when finished. The system then uploads the file.

## Using Florist Direct




Lets say, it is 10:00AM and you have 5 wire-out to send out.

On the "-out Processing Center" form, at this point the **Wire** buttons on these 5 orders still show an "empty folder.

Click on the **"Select"** button. to look up a specific florist, you can select "VTN" for Wire Service and click on the **Directory** button.

Simpler approach is to click on the "**Florist Direct**" button and the system automatically changes the wire service to "VTN" and the "**Transmit By**" to "VTN Fax" and opens the "VT Net Send" form to save you keystrokes.

This form lists the shops with Fax numbers first. Shops without fax numbers have "Red" background. For these shops you can click on the "**Add**" button, call them, get their fax number and then enter it into the directory.

You can also add your own "Associate" shops that you have established "Direct Order Relation" with, whether or not they are in the Recipients City / Zip code. But, if they are, then you can simply click on the "**Default**" button, to automatically insert the City, State and Zip code for the shop into the Directory.

### Bid or Final ?

Once the shops have been selected, you have the following 3 options;

- You can send "Ask For Bid" orders to a few of the Associate shops, and wait for their verbal/fax response within a set period of time (say 15 to 30 minutes). The "Ask for Bid" orders do not have Credit Card information. Then go to Step #3.
- You can send "Offer to Fill" order and wait for verbal/fax response, within a set period of time (say 15 to 30 minutes). The "Offer to Fill" orders do not have Credit Card information. Then go to Step #3.

- This is the "Final Order" with a preset "Direct" (wholesale) price and your credit card information. You may just start off with this, and wait for verbal or fax confirmation. Or, this can be your final response (the last stage) to the "Ask for Bids" or the "Offer to Fill" orders above.

We recommend that you dedicate a separate credit card account for this purpose. This way, it will make it a lot easier to reconcile your credit card statement.

## Emailing the order

The VTN (Visual Ticket Network) for "Direct Shop to Shop Order Transfer" (called "The Florist Direct") allows you to send your VTN orders via "Direct & Immediate Email" feature of the eManager. This means, you don't have to use the old FAX method to transmit your Florist Direct orders.

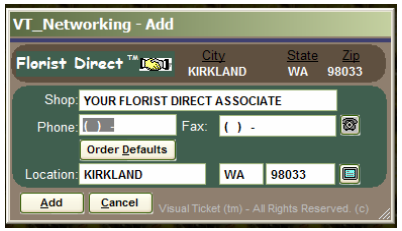
Since the "VTN - Florist Direct" is already a Paid Service, you do not need to have the eManager and the Power Module features on that station to use this powerful feature. The VTN's monthly Service Charge covers the applicable third party license fees for the eManager and Power Module feature sets (when used for this purpose only).

Once you use a certain shop and email the VTN Wire-Out order to that shop, the shop's email address is saved and uploaded with the rest of the shop information to the Master VTN Directory. Then the next time you download your VTN Directory file, the Shop's email address is made available in the VTN Directory file when/if you decide to use the same shop again.

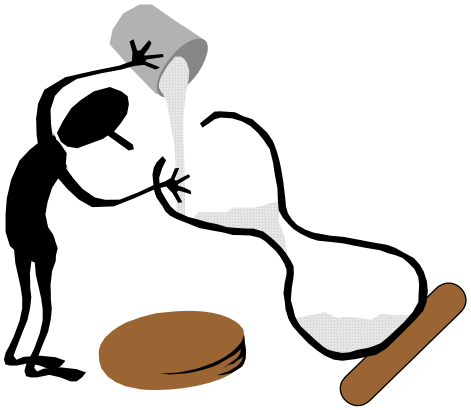
## Faxing the order

Here's the step by step procedure for faxing the orders;

- Click on one of the 3 buttons above for a florist listed on the form. You'll see a Print Preview of the order. You also see a note that suggests "Fax number xxx-xxx-xxxx has been added to windows Clip Board". This comes handy in a minute. Please review the order, and then click on the "Printer" icon on the Print Preview toolbar to proceed.
- The Fax driver kicks in. For standard Windows XP version, you click on "Next". For the name of the florist, don't waste your time. Just type "Florist" or enter a dot. For fax number, since VT has already added the fax number to Window's Clip Board, just press "Ctrl-V" to paste it into the Fax number field.




- Click on "Next" and the one page fax starts going. We have time it, and it should not take longer than 1 ½ minutes per fax.
- If for some reason, you still don't have a fax driver on your system, you can print it on a regular printer, take it to the fax machine, manually fax it, and then run back. But, we don't think that'd be worth it!
- The system prompts "Was the order faxed successfully?". This is an important prompt. If you answer "Yes", the order is stamped "Transmit" and "Verified" and is taken off the "Wire Assignment" list.

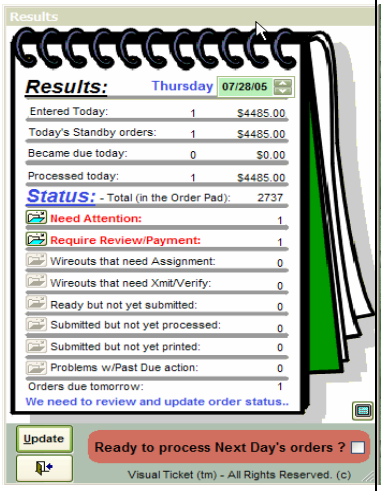


# Order Pad Status Review

One of the responsibilities of the Manager / Supervisor (not necessarily the System Manager) is to keep an eye on the status of orders in the Order Pad.

### A perfect day ?!

On a perfect day, say around 3:00pm when you open the Browser, you would like to see;




- All today's orders (and lots and lots of them, of course!) are in light brown (indicating Submitted).
- All orders for tomorrow and beyond are in Pink (indicating Standby or Future orders). Of course your Standby Parameter must be set to ZERO in order for this to happen.
- All other orders are either in cyan (Processed) or in burgundy (Archived) orders.
- There are no orders in while (not yet Submitted) or in yellow (requiring Attention) anywhere to be found.
- Now, you are ready to start tomorrow's orders, so you go to the Order Pad Status form (see below) and start printing tomorrow's orders.
- At the end of the day, you check the Order Pad status again, and then do the Balance Utility and Server Shutdown.

## Order Pad Status

This is the "Front Panel" of Visual Ticket for showing you what exactly is going on in your order pad. From the revenue stand point, you want to see how many orders were added today, how many became due, how many are standby, and how many actually got processed (posted).

From the operational point of view, you want to see what is pending further action and whether or not, you are Done for Day (so to speak).

We recommend that you run this form right around 2:00 to 3oo PM everyday. If there are "pending" orders with Attention flag, or orders that still need to be submitted, or be called out (wire-out orders), this would be a good time to wrap things up.

Usually, you would leave the date field at today's date (unless you want to look at previous day's status). Click on "Calculate" button, to have the system start the data retrieval.

Once the information is presented, go back to the order pad and address pending issues, until you get a real nice and clean "Order Pad Status".

At this point you may want to have your Designer's start tomorrow's orders. Hopefully there are order for the next day. If so, the system enables the checkbox labeled: "Ready to process the next day's orders ?". Check the checkbox, and the system will then automatically run the Daily Agent to change the status of the Standby orders for tomorrow to Due orders (it temporarily adjusts the Standby parameter to do so). Please note that once this checkbox is checked for a given day, it stays that way for the remainder of the day, and can not be changed back.

### Tracking orders in the Browser

Under the Status heading of the "Order Pad Status Review" when the Quantity of any of the status lines is Not Zero, the line is presented in Bold Red font with a little button on the right hand side (with "Open" icon). These buttons are enabled only when the corresponding Qty is not zero as well.

When you click the Open button for each line, the Browser window opens listing the orders in question.

To access each of the orders on the Browser simply click the "Go To" button. The Order Pad is opened so that you can make the necessary changes to remove the problem condition. Once you have takes care of the issues, you can click the "Update" button to refresh the status lines.

### Access Level Requirements

Please note that the sensitive Financial Information on the "Order Pad Status Review" is already MASKED for access levels lower than 3 (Manager) and 4 (System Manager).

However, based on requests from Visual Tickets users, we have lowered the "Access Level" requirement for this utility from the "Supervisor Level: 3" to "Employee Level: 2". Yet at the same time when the utility is used by a "Level :2" access, none of the Dollar figures are displayed.

This trade off allows you to delegate the task of cleaning up and managing the Order Pad status to your operators, and have them start the next day's orders,

without you having to be present. Yet, the proprietary "Revenue Information" is still kept from the Employee Level access.

### Before Server Shutdown

The system automatically activates and runs the "Order Pad Status Review" displaying the overall status of the Order Pad and the Daily Activity, before prompting whether or not, you want to continue with the Server Shutdown.

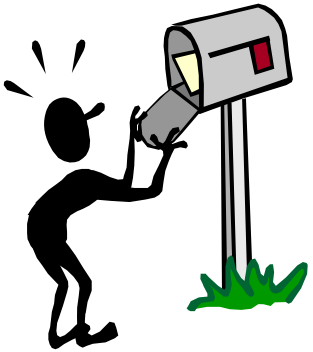
- This is to insure that the Order Pad Status is reviewed AT LEAST once, before you close out for the day. If "Order Pad Status Review" is already part of your nightly routines, then just you may just close the form and continue with the Server Shutdown.

### Auto-Update (Timer)

You may click the button with a "Clock" icon, to put it on a Timer which will then automatically update the figures ONCE A MINUTE (the same feature is also available on the Browser utility).

Since this is a non-modal form (meaning you can launch it and then move on to other tasks such as Order Entry). You can open and then position this form (window) on the upper or lower right corners of the screen (out of the way of your other windows) and let it automatically update the status of orders. Of course this requires that your Desktop area be larger than minimum 600X800 pixel (for 15" monitors).

This is an increasingly important feature, since with the new BloomNet Xml Agent's "Shop To Shop" messaging feature, it is important to keep on top of "Orders With Attention" (which also means orders with a Pending Shop-To-Shop Message").



## Delivery & Production Status

This facility is designed specifically for the Manager/Owner to monitor both Production and Delivery status on all orders due for today.

Select Today's date, click on the "Calculate" button to update the figures. If you want to view that status as it was the last time you updated the status, then simply click on the "View Status" button.

The system also tallies up the Production and Delivery Tracking statistics showing you the number of orders that need to be picked for production, orders currently in production, and the quantity of orders that have been completed. The same information is also provided with respect to Delivery Tracking information with respect to orders that need to be delivered, orders being delivered, and the quantity of orders that have been delivered.

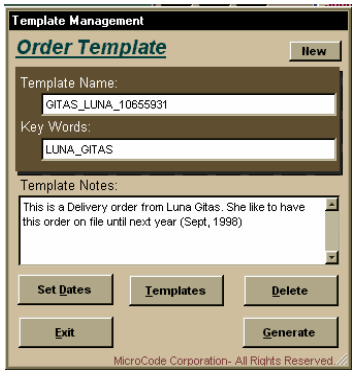
The Browse window that shows the detailed Delivery & Production information is pretty self- explanatory.

# Standing Orders

Standing orders are saved templates that are turned into orders by the Daily Agent on the day they become due. This means Standing orders (unlike Standby orders) are nowhere to be found in the Order Pad, until they are put there by Daily Agent. As mentioned in the "Repeat Order" section in Chapter 3, Standing orders are like Repeat from Template orders performed by the Daily Agent.

## Order Templates

We discussed how you can create a Template from an order (see Repeat orders under Order Entry). To refresh your memory, you locate the desired (source) order, and click on the "Template" button on the Toolbar (w/Red Clock icon).




Each template has a unique name, and a few keywords assigned to it for easier identification. It maybe helpful to add additional notes to each template with respect to what it is for. In a few months, you may not remember basic details about the order that is inside the template.

You may want to specify how long you should keep the template, so that it can be deleted, when it is no longer useful.

Click on the "Templates" button on this form, to Search and locate the Template you want to use to generate order(s) from.

- Click on "Generate" button to repeat the order now.
- Click on "Set Dates" button, to schedule Standing Orders (orders that repeat every so often).

On each templates, you can view/change it's "Standing Order" schedule, by clicking on the "Set Dates" button. The "Standing Order Dates" form will show all the Standing Orders scheduled for the template in question.

Once you have decided that a template is no longer useful locate the template in question, and click on the "Delete" button.

### Custom Print Requests

You can save the existing Print Request configuration of an order in the Template. Then when you use that template to create Standing Orders, you can have Custom Print Requests carried forward from the original order (instead of Default Print Requests setup in Session Defaults).

For example; if you like to print a HardCopy for Standing Orders, instead of the Default Work Ticket here is what you do.

- First, in Local Connections setup the Combined Ticket Print Job to print one of the HardCopy templates.
- On the Original order click the Print Requests exactly the way you want them to print for the future Standing Orders, by removing the Work Ticket Print Request (in the Combined Form), and adding the Combined Ticket Print Request (in the "Other Info" form) .
- Click on the "Yellow Clock" icon on the Toolbar to generate the Template. When asked: "Print the Default Print Requests for orders created from this template ?", click NO. Now when the Standing Orders are generated, they will print the Custom Print Requests setup on the original order.

*** Caution: If you have a Submitted order (where all the Print Requests have already been Cleared), and you click NO by mistake, then nothing will print when the Standing Order is generated and put into the Order pad.

### Add/ Remove Print Requests

To make it easier to Add or Remove Print Requests for an entire order with a Single click, use the button located on the top section of the Order Pad (right next to the Div. Station Staff and Division boxes).

- It REMOVES all pending Print Requests (when the order contains pending print requests). In this case the button has a "Printer" icon (signifying the pending Print requests).
- It ADDS the default Print Requests back to the order (when the order has no pending print requests). In this case the button has a Plus sign icon (signifying the adding function).

## Standing Order Schedule

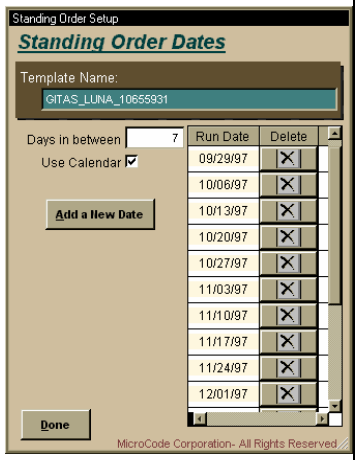
The Standing Order Schedule form is the list of templates you have set dates for (thus the term Standing Orders), sorted by the date that they will be generated.

For successive Standing Orders, You can adjust the "Days In Between", and keep clicking on "**Add a New date**" button, until you are done.

Make necessary modifications with respect to weekend days by clicking on the appropriate date on the calendar. If you don't want to mess with the calendar, and want to simply change the dates by typing them, uncheck "**Use Calendar**" checkbox.

### Auto-Repeat of Standing Orders

When using the Standing Order Scheduler, the "**Repeat**" checkbox appears when there are 2 or more orders scheduled for a certain template. Once this checkbox is checked, the Daily Agent will generate an additional Standing Order, if and when there are 2 more standing orders left for a given template. The third order is always added based on the time difference between the first and the second orders. The Standing Order is then automatically added indefinitely, unless the "Repeat" checkbox is unchecked.




Rules for automatically adding new standing orders:

- If Date2-Date1 = 7, the new order is scheduled on Date2+7 (weekly basis).
- If Date2 and Date1 are one month apart and on the same day of the month, the new order is scheduled on the same day of the month, a month later than Date2.
- If Date2 and Date1 are one year apart, and on the same day of the month, the new order is scheduled on the anniversary of Date2.
- All other orders are scheduled on Date2 plus the difference between Date2 and Date1. For example when having Date1=08/01/04 and Date2=08/15/04, the new order is scheduled on:

  08/15/04 + 14days = 08/29/98.

### Standing Orders Schedule

You can access "Standing Order Schedule" from the "**Operations**" menu. The Standing Order Schedule form allows you to sort the scheduled orders either by Template Name or by Scheduled Date (click on the corresponding "Column Titles"). You can activate the "Template Form" for each template, by simply clicking on the Template name. You can use the **Delete** button on the "Template" form, to get rid of all the Standing Orders that were based on that specific template.

### Standing Order Creation

Standing orders are created by the "Daily Agent" on the morning they become due. The manner, in which they become due, follows the Standby Parameter rules. In other words, if you have set the Standby Parameter (in the Processing Parameters section of the Setup Manger) to zero, then the Standing order is generated on the day it becomes due. If the Standby Parameter is set to 7, then the order is generated 7 days in advance of it's due date.

When in "Order Pad Status" form you force the Tomorrow's orders to become due, the Standing orders are also generated for that day. As the Standing orders are generated, they are taken off of the Standing Order Schedule form.

When a customer calls and cancels a Standing Order, be sure to access this form, and use the "**Delete**" button, to remove the order from the list.

The default setting for this parameter is ZERO days, meaning Standing orders are still generated on their Effective Due Date (as in the past).

But If you like to see your Standing orders in the order pad, say 5 days in advance of their Scheduled Date, then go to the Setup menu, go to Setup Manager, go to Processing Parameters, and change the Standing Order Lead Time to 5 days.

### Standing Orders Lead Time

When you set the "Standing Orders Lead Time" parameter to say 5 days, then all Standing orders are generated 5 days in advance of their respective effective Due_Date. But once they are added to the order pad, since the Effective Due date of the orders are still 5 days away, then the orders will be in the order pad as Standby orders for those 5 days. This allows you to print more accurate Planning Reports (from the Report Launcher).

To view or change your "Standing orders Lead Time" parameter settings, from the Setup menu, go to Setup Manager, and select Processing Parameters..

- The main purpose of the "Standing orders Lead Time" parameter is so that once they are added to the order pad as "Standby" orders, then they will be included in all of the Planning reports.

### Standing Orders Schedule

You can access "Standing Order Schedule" from the "Operations" menu. The Standing Order Schedule form allows you to sort the scheduled orders either by Template Name or by Scheduled Date (click on the corresponding "Column Titles"). You can activate the "Template Form" for each template, by simply clicking on the Template name. You can use the Delete button on the "Template" form, to get rid of all the Standing Orders that were based on that specific template.

## Global Status Changes

These particular facilities are made available only for "special" requirements, thus requiring System Manager level access (Level 4). You can access them from the Operations menu.

### Remove all Attention Flags

Run this utility only when you want to bypass system protections and remove all Attention Flags without actually reviewing each one (and thus resolving the underlying reason why they were setup in the first place).

A possible scenario would be on a busy Holiday around 2:pm, you have gotten tons of incoming Mercury/Dive orders due on that day, and just don't have the time to review each one, and cleanup the Enclosure Card messages, etc.

### Auto-Submit all qualifying orders

Now, this utility is not as drastic as the one above. You may run it only when you want to bypass system protections and Submit any order that has been entered, but has not yet submitted.

A possible scenario would be after reviewing the "Order pad Status" form you realize there are a dozens of orders not yet submitted. Instead of using the Browser to locate each one, you go ahead and use this facility instead.

### Remove all Print Requests

You are experiencing major Printer problems, and want to bring the printing jobs under control. You may then want to remove all Print Requests (including for Future orders), and then add one Print Request at a time, in order to trouble shoot the Printer problem you're having.

## Delivery Pools

To setup your system for Delivery Pools, access the Setup Manager and go to "Delivery Zones".

- Assign a specific "Stall Number", and a "Shop Name", for each Delivery Zone.
- Once you have identified the specific stall and the shop responsible for the delivery of each zone, you would then select the "Pool Ticket" print job.

- The Pool Ticket is available under "Shipping Labels" print jobs. This is done so that you can print a regular delivery ticket, in addition to the pool ticket for each order at the same time, with each one having a separate print request.

Both types of pool tickets require you to specify the assigned Stall# for your own shop. Please use the Session Defaults form, and specify the Stall# at the very end of your company name.

### Visual Pool Ticket

- In Local Connections, go to Print Job Access, and select Shipping Label print job. Choose the s_lbl1 template and specify the printer.
- On each station, access Session Default Order Entry tab and check Shipping Label print request to be added for all local delivery orders.

The Pool Ticket will have the "Stall #", and the "Shop Name" responsible for that "Stall #", in large bold font on the Pool Ticket. The Pool Ticket also has the Order Transaction Barcode Label for faster and easier Order Tracking. The Pool Ticket also contains the name of your shop on the upper left corner of the ticket.

#### Using pre-printed Pool Tickets

This particular template is designed specifically for "standard pre-printed pool ticket" printed by MAFDC Inc. – and distributed by Graphics Resources Inc. (770)368-9619. This Pool Ticket is used in the Atlanta, GA area (and may be other areas as well, including yours). If the Pool Community in your area uses a different format, you can use this template as the base, create a User Defined Template by moving the fields around to match your specific pre-printed form. In order to print this template properly, please note the following:

- You must select the **s_lbl4** template, and specify a Dot Matrix printer for printing the ticket, since these are "Track Feed" forms.
- Set the "Page Size" in Windows Printer folder. To do this, from Windows "Start" menu, go to "Setting", go to "Printers and faxes", right click on the Dot Matrix printer, go to Properties, and set the Page Size to "Custom". Then click on the "Custom Size" icon, and specify 550 X 825 (1/100 of an inch).

## Canadian Taxes

For Visual Ticket users in Canada, the system provides the following functionality for compliance to various taxes being enforced in different provinces of Canada.

- Compliance to the Flower Canada rules is OPTIONAL for florists in Canada.

Please check the "Enforce Flower Canada Rules" checkbox (located in the "Business" tab of the Setup Manager) accordingly after entering a few Wire In/Out orders and consulting with your Accountant and your Provincial Government Revenue office.

### Local Orders

GST is setup in the "Business" tab of the "Setup Manager". Please access the "Sales Tax/GST" form, locate the line for "GST", and check the "Activate" checkbox. While on this form, change "County #4 Tax" to "HST (Harmonized Tax)" and enter 15% for the percentage rate.

Also change the "County #3 Tax" to "No PST Tax" and enter 0 (zero) for the percentage rate.

While entering a local Delivery sale, you will notice that the standard 7% GST will be applied to the total amount of the order. Please drop down the Tax dropdown and notice "HST" is now available for selection. When you select it, the system will automatically change the GST value to the HST value (of 15%) and also changes the PST to 0% (No Tax PST). This feature comes handy when you need to charge HST for orders destined for the Maritime Provinces.

### Wire orders

Being a Canadian you already know that manual calculation of taxes for wire orders in Canada is no trivial task. It is important to note that Visual Ticket completely automates the tax requirement of wire orders in Canada. What is required is that you enter the Recipient address (including the Country field) correctly. It is also important that you update your system when tax laws change.

#### Canadian, Aye?

From the Main menu, go to Setup and select "Session Defaults". You need to make sure you have specified "Canada" for the country field in your company

(shop) address. This is how the system identifies your shop as a "Canadian" shop. Since Session Defaults is Session specific, you must verify this for all stations.

➢ Compliance with Flower Canada Rules is OPTIONAL for florists in Canada.

Please check the "**Enforce Flower Canada Rules**" checkbox (located in the "Business" tab of the Setup Manager) accordingly after entering a few Wire In/Out orders and consulting with your Accountant and your Provincial Government Revenue office.

## Exchange Rates

As you may know, Wire Services publish exchange rates for wire orders from/to the US, on a regular basis. Please access the "Wire Service" setup (in Setup Manager), click on **Setup** button for each wire service and enter the exchange rate for that Wire Service. At the time of publishing this manual, the following were the various exchange rates:

| | | | |
|---|---|---|---|
| FTD: | 1.45 | TEL: | 1.35 |

You can see the actual amount of "Exchange Rate" that is applied to each order by accessing the "**Status**" form on each line item on the order entry grid.

The "Exchange" amount is added to the "Extended" amount of each line item, as sort of a "Service Charge". Obviously the "Exchange Amount" is not included in the "amount given" to the "Filling Florist", and it is added to the "Service Charge" (AKA Transmission Charge) when transactions are posted to the long term Posted Database (Micro Florist).

## Implementation

For wire-in orders the system uses the following formula to calculate GST:

```
$Value  X  (0.07 / 1.07) / 0.73
```

The above formula assumes a 7% GST and 80% split with 7% wire service commission.

The following table shows the various taxes charged, for different destinations (or origins) of wire orders. The implementation relies on the operator to enter the Recipient's address correctly (must specify the Province/State and especially the Country).

Most of the complicated calculation are performed when you Save the order, so don't be alarmed by incorrect figures on the order pad, until you have Saved the order.

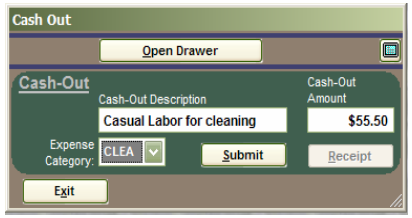
| | Origin | Destination | Flowers + Delivery | | Service Charge | |
|---|---|---|---|---|---|---|
| | | | PST | GST/ HST | PST | GST/ HST |
| Wire outs | Local | Local | 8% | 5% | 8% | 5% |
| | Local | Ontario | 8% | 5% | 8% | 5% |
| | Local | Maritime Provinces (NS, NB, NF) | 0% | 13% | 0% | 5% |
| | Local | Other Provinces | 0% | 5% | 0% | 5% |
| | Local | US (*note) | 0% | 0% | 0% | 5% |
| | Local | World | 0% | 0% | 0% | 5% |
| Wire ins | Canada | Your shop | 0% | 7% | 0% | 7% |
| | US (*note) | Your shop | 0% | Formula | N/A | N/A |
| | World | Your shop | 0% | Formula | N/A | N/A |

- * Note: Wireout orders to the US will have the "Exchange Amount" added to each line item. For example when sending a $100 order to the US, the system will charge the customer an additional $45 (given FTD was selected as the wire service) in order to compensate for the exchange rate charged by the Wire Service.
- ** Note: For Wire-in orders from the US, the "Exchange Amount" is added to the amount given by the Sending Florist. For example a $100 order will be changed to a $145. Then the $13 GST (calculated based on the above formula) is deducted, leaving $132 for the Flowers and Delivery.

It is important to remember that the entire operation for calculating taxes on Canadian wire orders is automatic, and there is no need to change the tax rates at the bottom of the order pad.

# Cash-Outs

Is used for paying out of the Cash Drawer for "something" that you would like to Register it as a General Ledger transaction. To access, select "Cash Out / Open Drawer" from the "Administration" menu.




Enter the description of the "Cash Out" (max. of 30 characters explaining the reason/recipient). Then enter the amount.

The selection of the Expense Category is "optional" and relates to the Expense Category used in Micro Florist reports.

Click on "Submit" button and the "Cash-Out Utility" automatically prints the "Cash-Out Receipt" on the Cash Register Printer setup on that station's Local Connections.

Place the "Cash-Out Receipt" into the Cash Drawer and count it as "Cash" when Balancing.

## Recording the Drawer Open Action

- You can now enter a $0.00 amount "Cash-Out" to RECORD the opening of the Drawer. In the case, the utility always records all "Open Drawer" transactions under the MK_1 Expense Group. The operator must enter the reason for opening the Register in Transaction Description field.
- You can view all of the Open Drawer Transaction in Posted Payments report.
- The Open Drawer button (located on top of the Cash-Out utility) is NOT available for Employee Access Levels of 1 and 2.

### Cash-Out and the Balance Utility

Cash-Out transactions are General Ledger entries and as such they will be included in the "GL" Transactions row under the Cash column if the "Include" check box is checked before you click on the Update button. To see the details of all Cash-Out transactions within the specified Time Interval, simply click on the "Calculate" button, labeled 1.

### Cash-Out and the AIM

Since Cash-Out transactions are General Ledger entries, they are already included in Accounting Interface Module (AIM) Calculated Fields Report. Print a copy of the Calculated Fields Report and look for gl_Cash and gl_total (negative numbers). Then there is also the Calculated Field called gl_cashout, which only contains the total of all Cash Out transactions and is a positive number.

Please consult your Accountant (or your "IIF Expert") to add the corresponding Cash-Out line to your IIF Editor, if it is not there already. Otherwise, your IIF may not balance.

## Changing Expense Groups/Categories

### Quick Setup

You can Modify the Cash-Out category descriptions directly from the Cash-Out form itself. To do so, just click on the "Browse" button that is located at the bottom of the Cash-Out form.

### Detailed Setup

In order to change the Expense Groups & Categories used for Cash-Out transactions, please follow this procedure;

- Start the Micro Florist, go to the Transactions menu, select "Account Transactions". Press <Enter> to select any Account_Id that is blinking. Hit <Enter> key button twice, to pass the Check# and Date fields.
- From the "Scrolling Menu" hit <Enter> to select Exp (Expense) type of transaction. The Search Engine blinks on the IM (Marketing Group) as the top Expense Group in the system. Please note that Expense Groups that begin with an ! (exclamation) are "System Expense" groups and may not be Modified or Deleted.
- Press the Up/Down arrow keys to move to another Expense Group. Once you hit <Enter> and select an Expense Group, then you will be able to see the Expense Categories assigned to that Expense group. Then, you can press the Up/Down arrow keys to view those Categories.
- Press the <Escape> key (or F10) to exit back to the Scrolling menu. Or, you can hit the <Enter> key to select a certain Group/Category but then enter Zero (for the amount) to Cancel transaction and get back to the Scrolling menu.
- To Add a new Expense Group, hit F5 when Search Engine is blinking on the Expense Group position. Once you have added a new Expense Group, hit <Enter> to select it, then press F5 again to add different categories for that Expense Group.

- To Modify (or Delete) an existing Expense Group, press F3 (or F4) when Search Engine is blinking on the Expense Group.
- To Modify (or Delete) a certain Category, press F3 (or F4) when Search Engine is blinking on the Category.

### Voiding Cash-Out Transactions

Cash-Out transactions maybe VOIDED (as well as Reversed). Voiding the Cash-Out leaves no Audit Trail.

In order to Reverse a Cash-Out transaction, you need to enter another Cash-Out transaction with an equal but negative amount.

Please Cash-Out transactions are also listed on the "Posted Payments / Adjustments." Browser" (available from the "Posted Transactions" selection on the File menu).

To Void a Cash-Out transaction, simply go to "Posted Payments" Browser (from the File menu), locate the specific Cash-Out transaction you like to Void, and the click on "Delete" button.

## Credit Card Security

All Credit Card numbers in the system are encrypted (except for the last 4 digits) by default. However, there is no encryption scheme that can not be broken, given enough skill and enough time as allocated.

So, the responsibility for guarding this sensitive information against vandalism or hacking should be taken as seriously as a bank or a financial institution does.

If you are not sure you can protect this information, then please remember in Visual Ticket, you always have the option NOT TO SAVE any Credit Card information in the system, as well as DELETE any and all the Credit Card information already in the system (at anytime, you consider the risks to be too high).

### Credit Card Info. & Customer Consent

According to new Privacy Laws in certain countries and jurisdictions, storing the Customer's Credit Card information requires customer consent. These laws and regulations are in a state of flux now-a-days and you may want to check with your Merchant Account Provider and visit your Federal, State and local laws and proceed accordingly.

## No Credit Card Info on file

### Account Sales

#### Customer Profile

You can check the checkbox "No Credit Card on file" in Customer Profile Setup form, which will ERASE the Credit Card information from the order, once the Approval is obtained.

With "No Credit Card on file" checkbox checked, the Credit Card information fields on the Customer Profile Setup form are also ERASED and then locked.

#### Customer Defaults

You can also set the "No Credit Card on file" as a Default setting in Customer Defaults (you can access "Customer Defaults" from the Setup menu, select Setup Manager, click "Business Tab" and then click "Customer Types / Defaults" Access button).

When "No Credit Card on file" is set as DEFAULT, then NO credit card information is maintained by the system for new Account Sales (unless individual customers are setup otherwise). For General Sales please see below.

### General Sales / QuickCash

You also choose NOT TO save Credit Card Information for General Sales and QuickCash sales.

To activate "No Credit Card on file" for General Sales and QuickCash sales, from the Setup menu, go to Setup Manager, go to Environment Setup and check the checkbox "No Credit Card on file (General Sales)".

Please note that the Credit Card information is only removed, after the card is used (approved) and not before. Again, we recommend that you regularly check with your Merchant Account provider (or check your State and Federal laws) regarding new Privacy legislation.

## Maximum Credit Card Security

- Check the "No Credit Card on file" for General / QuickCash sales (in Environment Setup).

- Check the "**No Credit Card on file**" for Account Sales (in **Customer Defaults**).
- Only save the credit card information for customers WITH CONSENT (by un-checking the "**No Credit Card on file**" in his/her profile).

### Erasing ALL Credit Card Information

You may also decide to ERASE ALL Credit Card information stored in the entire system by clicking on the Setup Manager's "**Misc**." tab, then click the **Tech Support** button and then execute "Erase ALL Credit Card Information in the system".

Please note that it will take 3 Server Shutdown sessions to over-write the Visual Ticket backup folders. You should also be aware that your external Tape/CD backups will still contain sensitive Credit Card Information, even after you have deleted them from current files.

## Credit Card Agent

The same also applies to the Credit Card Agent, such that upon obtaining the credit card Authorization, the Agent will ERASE the customer's credit card information depending on the "No Credit Card on file" settings above for Account, General or QuickCash sales.

## Voids / Refunds

Please note that once the Credit card number is erased, for REFUNDS or VOIDS you would need to call the customer and obtain the Credit card number again (which is what having "No Consent" to save the credit card number really means).

You may also do the Refund / Void directly from the Gateway website or via the ICVerify.

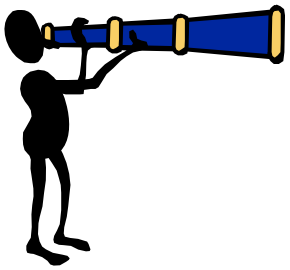
# Handling Order Fragments

When an order fragment is present on the Browser (due to improper Save / order entry functions), you have the option to Delete (remove) the Order Fragment from the Browser to eliminate certain complications such as possible "Relation Broken.." messages.

It is important to note that removing the Order Fragment is not a replacement for the File Maintenance operation (which fully rests and packs all Relational Tables involved).

- To Remove the Order Fragment, open the Browser, find the Order, and click "Go To".
- Once the Browser prompts you that this is an Order Fragment, click YES to "View / Delete the Order Fragment".
- Then per the message displayed on top of the Order Fragment window, hit Ctrl-T to Delete (remove) the Order Fragment.

The Order Fragment now displays the Credit Card number in an un-encrypted format (in case order needs to be re-entered).



# Chapter 5

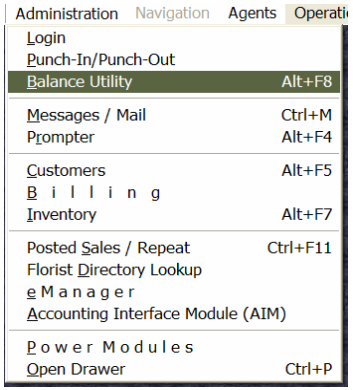
## Balancing and Reports

**Recommended read for:**

1) System Manager
2) Manager

### Overview

In the first part of this chapter we discuss the activity referred to by most as "Balancing", which takes place after around closing time, and include closing out the registers, counting the cash, the checks, perform credit card Settlement, then making sure they match the calculated amounts, print reports and finally resolve any discrepancies. In the second part, we talk about "Reports" in general.




### What is a Session

Just to refresh your memory, a Session is one of the lines you have setup on the Monitor Agent for each one of your stations. So, if you have 5 stations (on the left column of Monitor Agent) and for each one of those stations, you have setup 3 employee (3 lines on the grid) to access that station, then your have total of 5 X 3 = 15 sessions.

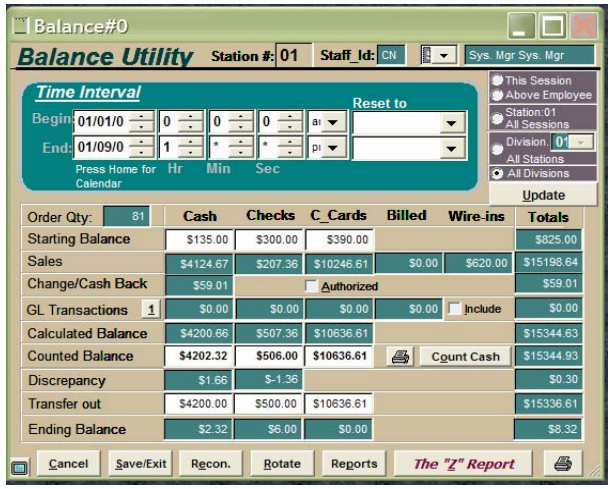
On the System Monitor Agent, you can access individual sessions, by selecting the Station # first. The Station No. column is located on the upper left corner of the Monitor Agent..

## The Balance Utility

This important utility retrieves all transaction activity entered within a specified time period and by maintaining starting balances, counted vs. calculated fields, and calculating the "discrepancies" involved, it helps you "Balance".

### It's a Balancing Act

Most shops run a single Balance Utility session at the end of the day for the entire shop, since they are not interested in balancing stations/divisions individually. In this case, you don't need to be concerned with changing any of the select criteria located above the "Update" button. The Default values facilitate Balancing the entire shop.




### Where are my numbers ?

The important point to remember is that the Balance Utility is "Session Specific", meaning there are as many separate Balance Utilities on your system as there are Sessions (on your System Monitor Agent).

If you enter your "starting / ending balances", counted cash, etc and then save and exit the Balance Utility, the only way you are going to see those numbers again, is to be on the same exact station, and logged in with the same Staff_Id.

You can also, always click on the "Balance" button for the specific Session on the System Monitor Agent.

### Balancing Separately

If you are interested in breaking down the balancing process to individual shops, employees, or divisions, then the Balancing Utility can filtered for a specific;

- This Session - When you balance for a specific Session (03TM), you are only concerned for sales entered by TM on station #3. With her own starting and ending balances.
- This Station, When you balance for a specific Station (04) you are only concerned for all orders entered by on Station #4, regardless of which session was logged in.
- Employee. When you balance for a specific Employee (ie Staff_Id = TM), you are concerned with orders entered by TM across on all stations.
- Division. You are concerned with capturing ALL transaction activity for a specific "Selling" Division (not Assigned Division).

You may use each session's own separate Balance Utility to balance that session's activity. For example, for sessions 01TE, 01WK on Station 01 (assigned to employees TE and WK). The corresponding Balance Utility for each session is automatically activated (with the starting/ending balances) for TE or WK.

However, when balancing for the entire station, specific division, or the entire shop, you may use the dummy 01SM session for storing respective Starting/Ending balances.

For shops with "floating" employees (the employee enters the next sale on the station that is closest to her), the "**This Employee**" selection criteria, allows you to capture the total sales entered by that individual employee across the network, given the employee performs a login on every station, before entering orders (otherwise, how would the system know?).

Although with Floating Employees it is quite difficult to maintain the Beginning / Ending balances separately for each employee, unless each employee has a portable Money Drawer.

#### Balance another session

When you access the Balance utility from the Administration menu, it always opens for the "Current" session. To balance another session on the same station, you need to use the Login Utility (**Admin. Menu > Employees > Login**) to switch session, and then activate the Balance Utility for that session.

### Central Balancing

One of the neat features of the System Monitor Agent (running on the VT Server, usually located at the office, where the Owner/ Manager has access), is that you can access each and every session's Balance Utility, conveniently from a central location.

To try it, click on System Monitor Agent running in Windows Taskbar. Click on the "**Balance**" button on any line (session) to activate that session's own Balance Utility. Thus you can balance every station remotely from the office, without moving from your desk.

### Employee Access Levels

Employee with "Access level-2" has the following privileges restricted:

- To access the Balance Utility, s/he still requires Supervisor Password (over-ride).
- S/he can only run the Balance Utility for
  - his/her own Session, (also available for Level-1)
  - his/her own Staff_Id, (also available for Level-1)
  - for the Default Division Only. (level-2 privilege).

Please note the "Transfer-Out" fields are available to all levels who have authorized access to the utility.

## Step By Step Balancing

The following procedure allows you to Balance the entire shop (you can use the same procedure to balance each session separately, depending on the selection criteria):

### Retrieving the information

- Once the Balance Utility is activated, click on "All Divisions". Select the appropriate Time Interval. The Time Interval should be set to start from the last time you balanced, to the present time (usually from last night, to tonight).
- When filtering for a specific Division it is referring to the "Selling Division" (as opposed to the "Assigned (Filling) Division").

#### Include GL ?

- The GL Transaction row displays "changes" applied to the Cash Register Accounts i.e.; **ICA** (Cash in the Register), **ICH** (Checks in the Register), **IMC**

(Master Card / Visa Account), etc., due to Payment on Accounts, or other GL Transactions (such as Payment, Cash-outs, Balance Adjustments, etc.).

- Check the "Include" checkbox to include General Ledger transactions for the specified time interval.
- Since GL Transactions are not "station specific", you should include GL transaction, only when you are balancing the accounts for the entire shop (and not just a specific station).

**Update figures**

- Click on the "Update" button to retrieve the data.
- Usually the Beginning balances are already setup from the previous night. If this is the first time you are performing the Balancing procedure, enter the Beginning balances (mostly for Cash, since for Checks (in the Register), and Credit Card, the beginning balances are zeroed out every night).

## The Count Cash Utility

- At this point we need to count the Cash. In order to do this, you may want to use the "Count Cash" Button. This is a handy little utility that lets you enter the quantity of different coins or bills, adds them up and put the total amount into the Counted Cash field.
- The Balance Utility puts this information in a temporary file on that station, allowing you to come back to it, without loosing the information. If you are starting a new "Balancing Session", you should click on the "Yes" button to clear the previous count information. The Count Cash file is Station specific, and will load the same figures for different sessions (the Cash Drawer is connected to the station, and not a session).
- Once you have finished counting the cash, the total for "Actual Cash On Hand" is automatically transferred into the "Counted Balance" for Cash.

## Printing the Check Deposit Slip

The little "Printer" icon located next to the "Count Cash" button (under the "Checks" column) prints a list of all checks received either for "Sales" (when paid by check) or for "Payments on Account". But in order to include the "Payments on Account" checks on this list, you must remember to check the "Include GL" checkbox.

The printed list is only 35 columns wide, with the first column showing the "Check Ref.#" and the second column displaying the "Check Amount". The List is sorted by the Check Amount so that you can easily locate and check off each check. The list is totaled at the bottom of the list.

- The main purpose of the printed List is to include it with your Checks, when you deposit them at the bank (hence the Check Deposit Slip). But obviously you can also use it as quick means to resolve discrepancies, or keep the list for archival purposes.

The Bank usually requires such a Tape, listing the checks with their amounts being deposited.

Please note that you can first "View" the "Deposit Slip" and after viewing it, you have the option to continue with printing, or abort the Printing.

## Resolve Discrepancies

At this point the system calculates any discrepancy that may exist between the Counted Balances versus the Calculated Balances. Repeat the same procedure for Checks. For Credit Cards, use the Settlement Report from Gateway Website (or ICVerify) to enter the counted balance.

- If there any discrepancies, print the Balance Utility Report (click on the Print button), recount and verify the totals one more time, and check off against the printed report. You may also click on Reports button and print the "Order Pad - Compressed Sales Report" from the Report Launcher.
- If the discrepancies persist, then you need to run the "Reconcile Utility", and try to locate the source of the discrepancy.

# The Reconcile Utility

If you are unable to resolve discrepancies at this point, try the Reconcile Utility by clicking on the Recon button. The "Reconcile" utility activates the Reconcile menu. From this menu you can select different Methods of Payment (i.e. Cash, Check, CC, etc.), and have them be sorted according to your specific requirement.

This utility pulls all the detailed transactions that was used to calculate the "Calculated" balances, sorted in a manner such that you can quickly locate (and check off) individual transactions.

- To verify whether or not the "Calculated" balances are correct, you need to check off individual transactions by entering "Y" in the "Cleared?" column.

- The system saves your work-in-progress, as you work through a certain method of payment, allowing you to come back to where you left off. To clear and start over, enter "**Yes**" when asked to recompile the file.
- In order to only see ONLY the remaining "not yet cleared" transactions, enter "**No**" when promoted "Include Cleared Transactions?"

As an example, lets assume you have a discrepancy in balancing the checks in the register.

- From the "**Reconcile Menu**", select "Sorted by Check Numbers".
- Enter "Y" in the "Cleared?" column for each check you can locate, that matches the amount for that transaction.
- Using this method you are bound to eventually locate the culprit. Maybe a missing check, or a check with a wrong amount..

As mentioned above, the "Reconcile Utility" also maintains the work-in-progress information in a temporary file on each station. Clear (ie Recompile) the file only when you are starting a new "Balancing Session".

### Transfer Amounts

Once all discrepancies have been resolved, enter the amounts being "Transferred Out" (for deposit in the Bank).

The "**Transfer Out**" button (the little with a Circular arrow icon) automatically inserts the "Counted Amounts" into the "Transfer Out" amounts, with the exception of Cash, where an $X (typically $100 or $150) amount is kept for the next day to make change.

This $X is a "Sticky Value", meaning the Balance Utility remembers the amount from the previous session.

The system will then calculate the "Ending Balances" for Cash, Checks, and Credit Card. The amounts you enter in the "**Transfer Out**" are used for calculating the Ending Balances,.

## Rotating Balances

Once you have reconciled everything, and figures out your "Ending Balances" it is time to click on the "Rotate" button to transfer Today's Ending Balances, with Tomorrow's Beginning Balances. Then you are ready to "Save and Exit" the Balance Utility.

- If you prefer, you can also do this rotation on the next night, before you start your balancing work, so that the **Ending Balances** from the previous night become today's **Starting Balances**

When Rotating Balances, the following prompts are issued:

- Rotating balances for the "Next Balancing" session, resets (erases) the figure for the current session. - Would you like to Continue ? **Yes/No**

If the station is configured to run AIM (Accounting Interface Module) sessions, then the above message will also include: Reminder: Run AIM for this session, before erasing it

- Rotating Balances is best done right before you start your next Balancing session (rather than right after you finish your current session). This way your previous night's Balancing Information stays intact during the following day, in case you need to review them again.

### Transferring Out Funds

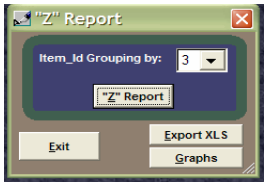
The Balance Utility itself does NOT generate any General Ledger transaction, for these "Transfer Out" figures, but they are sent to QuickBooks Interface via the AIM (Account Interface Module).

If you are still using the Micro Florist for your accounting, you need to use the Transactions menu and enter the corresponding "Transfer-To" transaction.

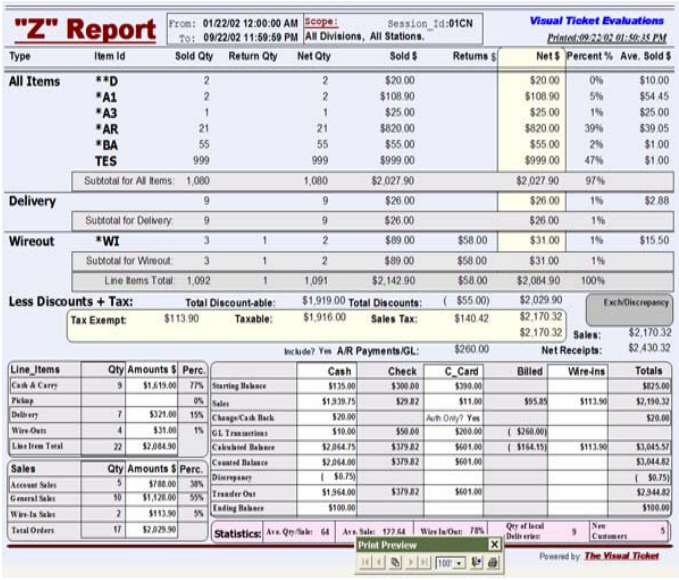
So, at this point, you may print your Z-Report for the night, then click on **Save/Exit** to save and exit.

## The Z-Report (order pad)

The same way we had the "Tale of 2 Databases" to discuss in Chapter -1, we have the "Tale of 2 Z-Reports" to mention here. The Main Z-Report (this one) is of course the one that runs off of the Order Pad Database for purposes of Balancing and capturing all activities (whether or not they got Posted).




There is also the "Posted Z-Report" (click on Reports and you'll see it), which is sort of in the same format, but it only reflects Posted Transactions (ie Realized Revenue). Obviously, the two Z-Reports should not necessarily match one




another. Please see the discussion in Chapter -1, as to why this is.

So, if there was only one report that you had to print to capture sales activities for a given day, the (order pad) Z-Report would be the one to print. Here's how it works;

- The Z-Report uses the same "filtering" criteria (Time Interval, Division, Station, Staff selections) used in the Balance Utility.
- The **Z-Report** button becomes available once you "**Update**" the information on the Balance Utility by clicking on the "**Update**" button.
- The "**Item_Id Grouping**" dropdown lets you specify how you want the items sold to be grouped together. (by product line, department, category, etc.). For example, if you select 3, then items sold during this time period are grouped by the first 3 characters of their Item_Id. Items such as *ARR1, *ARR2, *ARR3 are all grouped under one *AR category. This is why it is important to assign the Item_Ids in your inventory properly.
- Here is a compressed snapshot of the zReport to fit on this page. Take a look at a real one on your Visual Ticket system for a more legible version!

### Exporting Z-Report Data

Once you click on the "Z-Report" button and the associated data is retrieved, the two auxiliary buttons labeled "**Graphs**" and "**Export XLS**" become available. The **Graph** button displays important business indicators (contained in the Z-Report) as graphic representations. The "**Export XLS**" button allows you to export the underlying information contained in the Z-Report into an Excel spreadsheet file. The Excel file can then be used for further calculations or export to Corporate IT systems.

We recommend that you use the **Save/Send Toolbar** to save/send your daily Z-Reports in Adobe Acrobat PDF files.

### Emailing the Z-Report

The "Direct & Immediate Email" feature of the **eManager** is also available for the emailing the Z-Report as well. This means, you can email the Z-Report directly to a customer (or to any other email address) Directly & Immediately by checking the checkbox labeled "**email it**" located at the bottom of the Z-Report Launcher, before you click the "Z-Report" button.

This powerful feature uses the same Direct Email Transport modules used in the Billing Module's eMail button and as such it requires the "eManager" and the "Power Module" features to be available on that station. Please consult your Visual Ticket Sales Rep. to add these features to the station of your choice.

For the contents (or the body) of the email itself, it uses the "Billing / Direct Email Template" accessed by clicking the "Template" button that is located at the bottom of eManager Setup form.

# REPORTS

The term "Reports" in this context refers to listing of orders for management and balancing standpoint and does not cover Tickets, Receipt, and production Paperwork All of those topics have been discussed in detail in Local Connections Setup Appendix.

As well as all the reports that are available in Visual Ticket's Report Launcher and "Module Specific" reports that are in different Visual Ticket modules, there are still many other financial, management, and marketing reports are available in the Micro Florist.

**Which Printer ?**

- All Reports in Visual Ticket are sent to the printer you have specified in Local Connections, Print Tab for "Bank Paper Printer" on that station..
- All reports in Micro Florist are sent to the printed connected to the LPT1 port on that station (which maybe a Local or a Network printer – See Micro Florist Print Setup Appendix).

## Catalog Reports

One of the most important things you can do to insure successful implementation of the Visual Ticket at your shop is to catalog each and every available report, and add to them, as new reports are announced in Visual Ticket News.

Obtain a 3 Ring Binder with 3 tabs for;

- Reports/Listings in the Report Launcher.
- Module Specific Reports (Power Modules, eManager, Billing..)
- Micro Florist Reports.

Some of the advantages of cataloging your own reports are;

- Sample reports contain familiar (home made) data.
- Paging through the catalog you may find different combinations of reports providing the information you are seeking.
- You can make your own notes on each report, as to where and how you obtained it. You can also make notes regarding when to print them.

Wait for at least a month, before you start printing your samples reports to place into your catalog. This will insure all the various sample reports will be populated with valid data. When you are ready, start from this point and print a sample report of everything we cover from this point forward, in this chapter.

We will not be covering each and every report / listing that is available on the Report Launcher. Most of them are self-explanatory, and there is no point in making this user's Guide any thicker than it currently is. But that doesn't mean, if we don't cover it in the User's Guide, it shouldn't be in your Catalog.

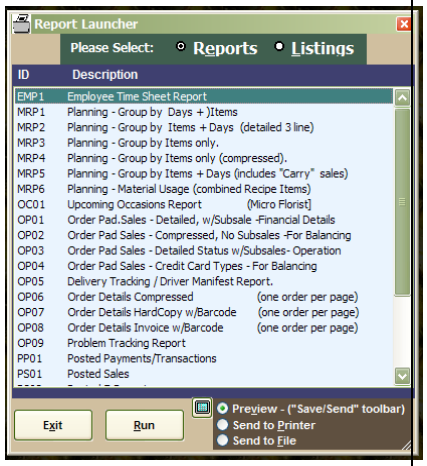
- When printing sample reports for your Catalog, it is critical to make appropriate notes on each report, regarding the Filtering and the Sorting methods used for the report.

**Your Inputs**

We are always interested in your inputs with respect to requirements for additional new reports/listings. If you have a special requirement please draw it on a tidy piece of paper with both the column and row labels, as well as the Data Retrieval Criteria (the data extracted for a certain time interval, certain employee, a certain division etc.), with how you want it to be Sorted.

Then fax your request to Visual Ticket Technical Support. If the report was recognized as "general application", then we will add to the R&D Wish List. If, the report is pretty specific to your operations (custom report), we will quote you the development cost and schedule.

# The Report Launcher




Except to "Module Specific" Reports (reports that are generated within a specific module, such as a Power Module), all Reports and Listing in Visual Ticket are "centralized" via the Report Launcher. This means, if you are looking to print a Report / Listing, the first place you want to look, would be to check out Report Launcher. The Report Launcher is available from the File Menu (as well as from many other modules).

The interface for this form is pretty self explanatory.

- The "Report Id" column for each report, makes it a lot easier to identify and remember Reports / Listings required for certain tasks. The Sorting of the Reports are based on the Report Id column.
- The Report Id abbreviations refer to GROUPING of the data/function. For example,
  - OP = "Order Pad Data",
  - PS = 'Posted Sales Data",
  - MRP = "Material Requirement Planning",
  - CU = "Customer Database",
  - INV = "Inventory Database",
  - PP = "Posted Payments/Transactions", etc.

## Reports vs. Listings

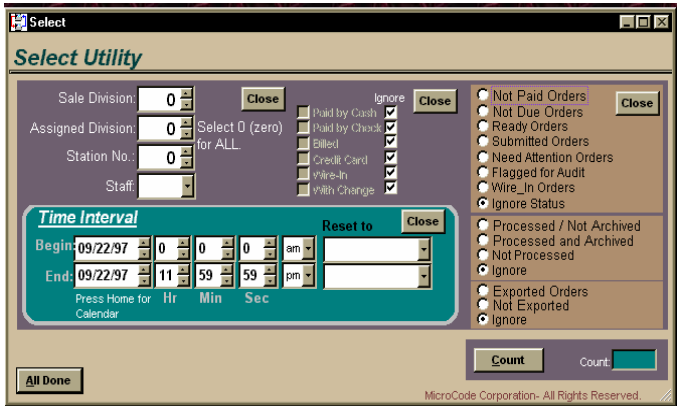
Notice the Radio Buttons on top of the form that allows you to select either "**Reports**" or "**Listings**". Each time you select one versus the other, the list changes. The basic difference between a **Listing** and a **Report** is that a **Report** is mainly transactions in time and is constructed from multiple sources of data, while a **Listing** is the simple list of records in a single database such as Inventory or Customer listings.

Since we are not able to fit the Print Preview screens for all the various reports in a size that would be legible in this manual, we recommend that the user prints a copy of each report using her/his own shop data and keep them in a 3 ring binder, for future reference We call it cataloging reports. More on this later.

Due to printer margins (the printable area of each printer) inherent in different printers, some reports may not fit on the page as originally designed. In such case the system may prompt with the Printer Dialog box to select a larger paper side (such as "Legal" size paper). This forces the printer to fit the report onto the page. Please note that you don't have to actually use a Legal size paper.

## Report Output

You can select to send the Report / Listing to Print Preview, Directly to a Printer, or save the report in a file, to be printed later. The default selection is "Preview".




It might as well be, since with "Preview" you get the option to load the very powerful **Save/Send Toolbar**. More on that, later in this chapter.

## Report Filtering

When you use the Report Launcher to run various reports, certain Selection Criteria and Sorting forms popup that let you zero-in on the information you are seeking.

For example when you choose to print any of the (order pad) Sales Reports, the "Select Utility" pops up, allowing you to select "orders" based on their "status", "time interval", etc.

The "Filter" button located on the "Select Utility" activates the all powerful "Filtering Utility" which lets you to filter the report even further, to insure the exact selection criteria that you have in mind, is implemented.

The Filter Utility is discussed in details in the Search Engine Chapter. It is important that you do a quick review of it now, to refresh your memory, before we can proceed.

## Sales Reports (Order Pad Database)

To show you how the Report Launcher works, and discuss some of the available Reports / Listing, in this section we start with Order Pad Sales Reports (as opposed to the Posted Database Sales Reports). We will discuss those later.

Here's a step-by-step procedure for printing any of the following Sales Reports listed on the Report Launcher. Please print sample reports to put in your Catalog, as you read this.

- Order Pad Sales-Compressed, No subsales, for Balancing.
- Order Pad Sales-Detailed Status w/Subsales for Operations.
- Order Pad Sales-with Detailed Subsales for Financial.

- From the File menu, select Report Launcher. scroll down and select " Order Pad Sales- Compressed" report. The "Select Utility" is then activated.

### Select Utility

The "Select Utility" is a general Filtering mechanism that allows you to setup a specific "Filtering Criteria" to select a subset of orders in the Order pad.

The simplest application is to count the number of orders that meet your selection criteria. This form is also used for generating reports, and exporting orders.

The Select Utility has the following 4 different sections. Please note any area that is not opened, produces a "Don't Care" condition for those criteria.

- Work station. Here you can select the "Sale Division" (the default division that is setup for the session the order was entered under). The Assigned Division (the division that is assigned to receive and fill the order, available in the "Other Info" form on the Order Pad). Station Number and Staff is self explanatory.
- Payment. Here you specify the "Method of Payment" used for each order. Please note that when a specific Method of Payment is ignored, then it produces a "Don't Care" condition for that particular Method of Payment.
  - Here is an example; to filter only those orders that were fully paid by Credit Card only, you would uncheck all "Ignore" checkboxes, and only check the "Credit Card" method. If, you do not uncheck the "Ignore" boxes, then you will receive all Orders that were paid by Credit Card, where some may have been paid by Credit Card and Check combined (multiple method of payment).
- Order Status. Here you can select from 3 different categories of orders based on their status.
- Time Interval. Self explanatory. You can use the shortcut dropdown controls to choose from pre-selected Time Intervals.

Assuming we want to list only transactions that were paid by cash. Click on Payment button. Un-check Ignore and check Paid By Cash checkboxes. This will NOT ignore orders that were paid by cash, and then selects only those orders that have a "non-zero" amount for Cash. This will include Partial Cash payments as well (because Ignore is still checked for all other methods of payment). If you leave the "Paid By Cash" checkbox unchecked, then you it will select orders that were NOT paid by Cash.

- Now to select the Time Interval for listing transactions, click on Time Interval button and enter the desired time period (otherwise it will list all transactions in the database).
- Before we close the "Select Utility", it is always a good idea to click on the Count button and see how many transaction have been selected with the current criteria. You can adjust the selection criteria until the count figure seems correct. Click on "All Done" button to close the Select Utility.
- The Report Launcher provides the following Sort methods for the report;
  - Div + Station + Date + Time (grouped by Div + Stations first).
  - Date + Time of order entry (Visual Ticket Time Stamp).
  - Date + Time of posting (Micro Florist Time Stamp).
  - Customer Account_Id (sorted by customer).
  - Order Amount.

Selecting the correct Sorting is critical depending on what you want to use the report for. For example, in order to find a specific order, sorting by Amount is the fastest way to locate the sale.

## Additional Filtering

By looking at the "Select Utility" and all the different criteria you can select on it, one might think that why would anybody ever need to filter the report even further ?. Well as they say, Visual Ticket doesn't offer more than you need, but more than what you are used to! What if, you wanted to list sales transaction with No Sales Tax ? Here's how;

- Click on the "Filter" button to activate the "Filter Utility" (see Search Engine).
- Click on Activate button to see the column headers (Fields) and the data contained in those columns. Soon, you will locate the field TAX that hold the Sales Tax amount for each sales.
- Armed with this important information, dropdown the Field selector and select TAX. Select "equals" as the Operator, and enter 0 (zero) for "Value to Filter for". That's it!
- Now here comes the acid test. Click on Activate button now, to see the list of "Filtered" transactions. Verify that they all selected transactions now have $0.00 for Tax. Once you confirm that you are done.
- Click on Done button to close the Filter form. Click on All Done to close the Select utility, so that you can preview the report.

What else can you filter for? Well, all the clues for that are also hidden under the "Activate" button!

How about selecting sales with NO TAX that were paid by American Express credit card? No Problem! After you have specified the TAX field criteria above, click on "And" operator, and on the second line select the field Card_Accoun, select the Operator "equals" and enter the value of !AE (for American Express Account). That should do it.

So, as you can see using the "Filter Utility" is not something fancy that only computer scientists can use, but it is a necessary and a routine tool that maybe used day in, day out for all your different reporting needs.

- When using the "Filter Utility" in conjunction with all of the other selection criteria on the "Select Utility" such as "Time Interval", "Order Status", "Payment", etc., you must first select all of the criteria on the Select Utility first, and then click on the "Filter" button to further narrow down your selection.
- You can keep track of the filtering criteria, and the number of records selected by watching the "Count" display on the Select Utility.

### Mercury, Dove or Bloomlink?

You can list incoming orders via Mercury, Dove or Bloomlink agents by simply filtering for the Staff_Id field as follows (each Agent has it's own Staff_Id).

- To list incoming Bloomlink orders, set Staff_Id = !B (exclamation + B).
- To list incoming Mercury orders, set Staff_Id = !M.
- To list incoming Dove orders, set Staff_Id = !D.

## Planning Reports

The Planning (for Material Requirements) reports can come real handy when calling your Wholesaler to order future material. The report allows you to specify a date range for the Due Dates, and will print "an Item by Item" report sorted by Items for each day.

Item quantities are totaled for "each Item" as well as for "each day".

The report also allows you to specify only a "Specific Item", or select "Wireout" items (instead of your own Inventory).

The standard Planning report groups orders by "Days" first, and by "Items" second. This allows you to determine "each day's requirements for various items".

The Planning #2 report groups by "Items" first and "Days" second. Allowing you to figure out your Planning based on "Daily requirements for each item".

The Planning #3 report groups by Items ONLY. Allowing you to figure out your Planning based on "Totals of each item for the entire time interval specified".

The Planning #4 report is the same as Planning` #3, except it only list "one line per item", thus it presents the report in a more "Compressed" manner.

### Planning and Production Status

All PLANNING reports are tied to Production Tracking status. When you select an Planning Report, you can specify

- "Not Done" orders - no Start or Finish time entered for Production status.

- "In Production" orders - Start time has been entered, but not the Finish time yet.
- "Done" orders - both Start and Finish times have been entered.

Each report also shows the "Production Status" (ie; Not Done, In Production., and Done, at the beginning of each line on the PLANNING reports.

Thus you can work on Next Week's orders (given they are not perishables), enter the Production Tracking status for the ones you have finished, and then have the Planning Reports print only the "Not Done" orders, so that you can zero in on the ones that need to be made.

### MRP Report #5

The MRP5 report is entitled:

- "Planning - Group by 1)Items 2)Days - (Includes Carry Items)"

Is an "Exception to the Rule" and somewhat different than all the other "Planning Reports" in following ways;

- It includes all the Carry Sales (non Production related) for purpose of looking at the "Total Output" of the shop (rather than just "Production output").
- Due to the inclusion of Carry sales for this particular report, the Date Range is NOT just a range of "Due Dates", but rather the "Sale Date" for selecting the PAST records and "Due Dates" when selecting Future orders (so your totals maybe different than from other MRP reports).
- As a result, this particular MRP report is for looking BACK as well as FORWARD in time, while all the other MRP reports are for looking into the FUTURE (when specifying the Time Period) with respect to the Material Requirements of "Standby" (Future) orders.

Assuming today is Aug./27. If you enter the time period "08/01 thru 10/01", you will obtain the list of all Sales since the beginning of the month (prior to today) including all of the Carry sales, as well as all the future (Standby) orders that are due before Oct. 1st.

As with the other Planning (MRP) reports, you can Filter for "In Production" and "Done" Production status, as well as filtering for a specific group (or an individual) item(s).

## Posted Reports

The "Posted" series of reports on the Report Launcher are different than the other Order Pad Sales reports. The Posted reports use the "Posted Database" (instead of using the sales transactions in the Order Pad Database). You would use these "Processed" reports more for "Accounting" purposes, rather than "Balancing" purposes. Since Processed orders signify "Realized Revenue", while the orders in the Order Pad are "work in progress", so to speak.

The "Save/Send Toolbar" feature is also available for all "Posted" reports (given you have the Power Module feature on that station) allowing you to save the report into Excel, Microsoft Word, or Adobe Acrobat PDF files and email it directly to your Accountant.

- In Posted Reports you always specify the Time Interval to cover the "Posting Time Stamp" (when orders are processed). This means if an order was entered yesterday, but got processed (posted) today, it will NOT be in today's Order Pad Sales reports, but will be in today's "Posted Sales" reports.

### Posted Sales Report

- Time Period covers the "Posting Time Stamp" (when orders where Posted and not when they were entered.
- Sorting of a report can totally change its application. For Posted Sales repot you may select from the following SORT options;
  - TRANS_NO_C - "Date_Time" - Natural Order
  - ACC_ID_C - "Account_Id" - Customer Account
  - INVOICE_NO - "Invoice_No" - Assigned by Billing Module
  - LOC_C - "Assn_Div" - The Assigned Division
  - SALE_LOC - "Sold_Div" - The Sold Division
  - CASHIER - "Staff_Id"
  - Trans_Code - "Sale_Type" - Line Item Sale Type ie; N (Normal), D (Delivery), O (wire-Out), I (wire-In)
  - DUE_DATE1 - "Due_Date" - Order Due Date specified in the Prep form.

## The Selection Utility

The same as there is the "Select Utility" for Order Pad Sales reports, there is also the Processes Sales "Selection Utility" available to help you filter-in or filter-out some of most "common" parameters such as;

- Admin. Section:
  - Sale Division vs. Assigned Division.
  - Station No.
  - Staff_Id
  - Tax Exempt Only.
- Payment section.
  - Method of Payment (Included or Excluded).

For example, if you are interested in a report that only lists orders that were either fully or partially paid by Cash, you would Uncheck Ignore, and check "Paid By Cash". It works the exact same way, we discussed for the "Select Utility" above.

- Filter Utility:

For Posted Sales Reports, we suspect you would be using the Filter Utility a lot. We are not going to cover the Filter Utility again in this section, but make sure you read up on it, in the Search Engine Chapter.

## Wire-In and Wire outs

### Automatic

From the Wire Selection Dropdown on this form, select Teleflora Wire-ins or outs.

### Using the Filter Form

#### Teleflora Wire-Outs

Here is a scenario for a sample report for your Catalog. You want to list all Teleflora Wire-out sales for last months. We assume the Teleflora Wire Account (in the Micro Florist Balance sheet) is still the default account of: !W2

- Enter Time Interval.
- On the "Selection Utility" select nothing.
- Click on the "Filter" button to activate the Filter Utility.
- Select the field TRANS_CODE, select "Equals" operator and enter the value: O (for wire-Out).
- Narrow the filter further by specifying the .AND. operator.
- Select the field DEL_ACC, select "Equals" operator and enter value: !W2
- Click Activate button to view selected transactions. You should only see wire-out sales for Del_Acc = !W2 (delivered by Teleflora). Click Done to exit the Filter utility.
- What the Count field to see the quantity of sales filtered. Click OK.

#### Teleflora Wire-ins

As another sample report, we are looking for Teleflora Wire-ins for last month.

- Enter the Time Interval.
- On the "Selection Utility". Click on Payment. Uncheck Ignore and check Include for Wire-ins. The Count value displays the quantity of all Wire-in sales (all Wire Services) for the specified time period.
- Now we need to use the Filter Utility to specify Teleflora as the Wire Service Account. Click on the "Filter" button to activate the Filter Utility.
- Select the field ACC, select "Equals" operator and enter value: !W2
- Click Activate button and you should see BOTH wire-ins and wire-outs for Teleflora listed (the Filter Utility operates independently from the selections in the underlying Select Utility). Click on "Done".
- As soon as you close the Filter Utility, the criteria of Teleflora Wire Service is added to your wire-in selection on the Payment section of Selection Utility, and the new Count value reflects the intersection of the two sets (ie the desired number of Teleflora Wire-ins).
- Click OK to view the report.

#### Other Scenarios

There almost UNLIMITED number of different Filtering / Sorting scenarios, you can use to extract the desired information from this single Posted Sales Report. You can fill out a whole shelf with 3 Ring Binders!! So, we'll stop here. But you can always email Technical Support to help you define the right Filtering/Sorting criteria to help you retrieve the report you are looking for.

### Report Contents

The contents of the Posted Sales Report is pretty much self explanatory, but since this is probably the most frequently used, as well as the most powerful report in the Agent Launcher, here's a quick overview.

The report contains the list of sales transactions, with Line Item details showing Delivery information (with City and State, for Delivery, Wire-ins and Wire-outs sales). The Customer information is also listed on top of each sale, when it is an Account Sale (as opposed to General sales).

The bottom portion of each sale lists both Time Stamps (ie; the Order Pad Time Stamp as well as the Posting Time Stamp. It also shows the Sales Tax, the GST, the Discount and Method of Payment details.

The "Summary" Section of the report contains the complete break down of the different Line Item sales types (Normal, Cash & Carry, Pickup, Delivery, Wire-out and Wire-in), the aggregate Tax/GST figures and the totals of various Method of Payment summary (Cash, Check, Billed, Credit Card, and Change).

## Posted Deliveries Reports

Posted Delivery reports include the following two flavors;

- Posted Deliveries (compressed)
- Posted Deliveries (w/ sub-totals).

These 2 reports are similar and contain almost the same information, except that the 2nd report contains SUB-TOTALS for

- Delivery Date, each Driver and each Delivery Service.

Both reports allow you to specify the

- Delivery Date period,
- The Delivery Service/Company.
- A Specific Driver (or any part of his/her name)
- The Standard Posted Sales Selection Utility lets you further filter the report if needed.

Both reports let you SORT by:

- Delivery Service + Driver + Delivery Date + City + State + Zip.
- Delivery Charge
- Item_Id
- Recipient's Last Name or Company

## Posted Daily Sales Report

This report breaks down sales activity and groups them by individual DAYS. The report uses the long-term Posted Database. The report is optimized for obtaining your "Weekly Summary" report, and as such it prompts you to select "Last Week" (the last 7 days, not including today) as the default time interval option (so that you don't have to manually specify the Starting and Ending dates for the week). But, never-the-less, if you wish to obtain the report for other Time Intervals, then you may select accordingly.

The report adds a row for each day within the specified time interval, whether or not there were sales on that day. This means, you will have blank lines (rows) for the days the shop was closed, or the nights you forgot to run Server Shutdown! (This is one of the objectives of this report).

The "Posted Daily Sales Report" (like other Posted reports) contains ONLY Processed (Posted) sales transactions after you have run the Process agent for the day.

The "Posted Daily Sales Report" can be run from the Report Launcher, the Balance Utility, the Billing Module, as well as the Accounting Interface Module.

## Posted Payment Report

Lists Posted Payments and other GL Transactions within a specific "Time Interval" and maybe sorted by:

- Account_Id - It also provides the subtotal for each customer.
- Post_Date of the Transaction.
- Trans_Date: Time stamp of the Posted Micro Florist transaction.
- Div_Type - Sorts by the Division # first and then groups the different TYPES of transactions together (Payments, cash-outs, etc.).
- Amount: - One of the easier ways to find a specific Transaction,
- Ref_No - which also includes the Check No, or the Approval No.
- Last Name - Customer's Last Name.
- Company - Customer's Company name.

The report totals the NET amount of all transactions in the summary section of the report. It also shows Customer's Current, 30 day, 60 day, 90 day and 120 Day Balances, if not ZERO.

## Posted Deliveries Reports

These 2 reports are similar and contain almost the same information, except that the 2nd report contains SUB-TOTALS for Delivery Date, each Driver and each Delivery Service.;

- 1) Posted Deliveries (compressed)
- 2) Posted Deliveries (w/ sub-totals).

Both reports allow you to specify the

- Delivery Date period,
- The Delivery Service/Company.
- A Specific Driver (or any part of his/her name)
- The Standard Posted Sales Selection Utility lets you further filter the report if needed.

Both reports allow you to SORT by:

- Delivery Service + Driver + Delivery Date + City + State + Zip.
- Delivery Charge
- Item_Id
- Recipient's Last Name or Company

## Reconciling Report Contents

In order to validate the contents of top level (summary) reports such the "Order Pad Z-Report" or the "Posted Z-Report", when there are "questionable" values, it is recommended that you;

- Select a slow day (such as a weekend) with fewer transactions.
- Print the (supporting) Detailed Sales Report from which the Z-Report is built.
- On the Detailed Report, inspect each sale's line item subtotal and the associated Method of Payment.
- Then validate the number(s) in question (on the Z-Report) by adding up the corresponding values from the Detailed Sales Report.

- For Order Pad Z-Report use the "Order Pad Sales-Compressed Sales Report".
- For Posted Z-Report use the Posted Sales Report (no filtering).

### Trouble Shooting Reports

- If an (Order Pad) Sales Report seems fragmented, try it again after you have run Server File Maintenance (or Server Shutdown).
- If a Posted Sales Report seems fragmented, go to the Setup Manager, go to the Misc. tab, go to "Tech Support" access, and click on "Do It" for "Remove orphan Micro Florist transactions".

## Customized Reports

You can now create a Customized Version of any Report, Listing or Label that appears on the Report Launcher (the same way you make User Defined Templates for Visual Ticket Print Jobs).

To do so, select your Report or Listing on the Repot Launcher and click on the "Customize" button that appears on the lower right corner. If you already have a Customized version of the report, the following menu appears;

- Load Customized Version
- Start Fresh (over-write)
- Delete Customized Version
- Cancel

Then click on the "Modify Report" button and the"Template Editor" application opens up allowing you to customize the report template. Once you are done, from File menu, select "Close" and save the template.

Now, the next time you click the Run button (on the Report Launcher), you can select between:

- Run the Standard Version or

- Run the Customized Version

Please note that each station has it's own set of Customized Reports.

# Module Specific Reports

Module Specific Reports are the kind of reports that can only be printed after a certain module or utility has done its thing and generated, retrieved and/or calculated the underlying data, so they must be printed from inside those modules. For example, the Power Module report of "Who Bought This Item?" can be run from Power Module #2 where that data is actually generated.

So, in order to continue with our Cataloging project, let's try the following reports, at least once.

### Balance Utility

From Admin menu, select Balance Utility.

- Enter a date range, click on Update button, click on button with Printer icon located on the lower right corner, to produce the Balance Utility Report.
- Click on The Z-Report, then click on "Z" Report to produce the Order Pad Z-Report (as opposed to Posted Z-Report).
- Don't bother with the Reports button, on this form. The Report Launcher activated from this button, only contains a subset of all the reports that are available when you open the Report Launcher from the File menu. So, supposedly, we have already sampled all the reports that are available on the Report Launcher.

### Customer History

From Admin menu, select Customers. Click Search to locate a customer with purchases and payments during the last month(s). Click on History button.

- Enter a Date Range for customer's posted sales/payments. Click on History button to produce the Customer History Report. Using the Save/Send Toolbar, you can create a PDF file and email it to customers, since this is a perfect report to send out, when customers inquire about billing issues.
- Click on Track button to track an individual Invoice #. Enter Yes to Print. To learn more about the Global Invoice Tracking Utility, see Customer Chapter. The Global Invoice Tracking button is also available under Payment button.

### The eManager

From Admin menu, select eManager.

If you use the eManager, then you can click on the Print button (located at the bottom of the eManager) to print the eManager Report.

The eManager Report lists the emails that are currently being displayed on the form. If you click on "View History" then the History will be printed, otherwise Current emails are printed.

### Accounting Interface Module (AIM)

From Admin menu, select Account Interface Module.

If you have used the AIM (for QuickBooks Interface), then there are a few important reports that can assist you with AIM operations, as well as for management reporting/planning purposes as well. After you have performed a "Build", you can try the following reports.

There are a few buttons with a Printer icon located at the bottom of the AIM form. The first one activates the relevant reports in the Report Launcher, which we have already cataloged. You may click on each button to print a sample report.

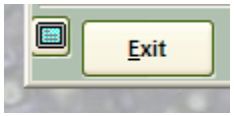
### Power Module Reports

From Admin menu, select Power Modules.

Power Modules offer many interesting and useful reports. Since we are only talking about "reports" here, we are not able to repeat what each Power Module does, here in this section. The best place to learn about each Power Module is to look it up in its corresponding Chapter.

For the purpose of Cataloging Reports though, let's make sure as soon as you use a certain Power Module, you would generate the associated report and place it into the Catalog.

## Snapshot (+Print) Button




Printing copies of certain Visual Ticket forms maybe considered a "Report", depending on the information that is displayed on the form. It is definitely worth considering a couple of sample print outs to place in the Catalog.

The Snapshot button is a very powerful feature that allows you to:

- Capture any Visual Ticket form as a Bitmap image.

- Print the Bitmap if needed.

You may wish to use the Bitmap file in a Training Document, email it to Technical Support if there is a problem, or Print it as a report..

As a sample report, consider printing a snapshot of the "Order Pad Status Review" under Operations menu (click on the Calculate button first).

You may also wish to print a snapshot of the Tech Support Signup sheet for your records.

This "Snapshot" button is (almost) always located close to one of the corners of every Visual Ticket form. It is always the button with a computer "Screen" icon on it.

Once you click on "Yes" button to continue, you are asked for a File Name. If you don't wish to save multiple images, hit the Enter key and accept the default file name. This way all BMP (bitmap) files are saved with the same file name (the new one will always over-write the old one) thus reducing clutter and saving disk space. The default folder for saving screen images on each station is:

C:\sms\vft\temp

If you wish to save multiple Bitmap files, then you should simply increment the VT0000001 number each time (VT0000002, VT0000003….). Please note that it is critical that you provide a valid path and file name and always use file extension of .BMP (make sure file name always ends with: a dot and then BMP for Bitmap).

The Screen Image Bitmap is always printed on the "Blank Paper Printer" specified in Local Connections.

## Save / Send Toolbar

The "Save/Send Toolbar" is offered as part of the "Power Modules" feature set. This powerful tool allows you to Save and/or Send your Visual Ticket Reports in the following Industry Standard file formats;

### Output (Save) Options

- Microsoft Excel (for further Calculations or Charting).
- Microsoft Word (for creating Presentations / Documents).
- Rich Text Format – RTF. (format used by Microsoft WordPad).
- Adobe Acrobat PDF (Email Attachment / or use for Archival purposes).
- XML Spread Sheet output format type helps you inter-operate with all XML-related Microsoft technologies.
- HTML, MHT, XLS, JPG, TIFF, GIF and PNG documents by providing a full set of functions that does all the work for you.
- Image output format type allows you to save report as BMP, PNG, JPEG, GIF, and TIFF file for incorporation into Brochures or PhotoShop type projects.
- You can also MERGE newly created Adobe PDF output file with the previously created PDF file (so you can have chronological Z-Reports or Billing Sessions).
- "Save & Send Toolbar" natively supports RTF (Rich Text Format). The RTF documents are generated directly (no third party software - e.g. MS Word - is required).

## How to ?

Once you click on one of the "Output Buttons", the "Save/Send Toolbar" converts the Report into the target format and loads the application (Excel, Word, Explorer, …) in real time to display the contents (given the application has been installed on the computer).

All output file names start with the Report Name followed with a Date + Time Stamp. This makes it easy to save the file and prevents it from being over-written.

The file is already saved before the target application loads. The output file is saved in your local c:\sms\output folder on each station. Once the target application loads, you may decide to "Save As" into another folder.

## Applications

Here are some of the real life benefits of this powerful feature.

- Transmit Reports: The Boss is on vacation in Hawaii. At the end of the day, s/he gets an email with the day's entire Z-Report activity in a simple PDF email attachment.
- Archiving: For Re-Printing a copy of the "Original". It is always prudent to print Archival copies of Daily Reports (such as the Z-Report or Sales Transaction reports), as well as Billing's Statement / Invoices so that they can be used as reference, when needed. With the "Save/.Send Toolbar", all such reports can be saved effortlessly with the proper time stamp, allowing for a lot faster Retrieval (than looking into folders and drawers in the backroom's file cabinets).
- Reduce Costs: All that printing of course costs money. You can save Paper, save Toner, and mostly importantly save Time.
- Customer Service: You can email the customer's entire "History Report" directly from Visual Ticket (as a PDF attachment), while the customer is still on the phone!. That is the level of customer service a VT shop can provide.
- Marketing: Word of mouth alone can increase your Bridal Business, when the word gets around that you routinely create (or update) Wedding Worksheets and email them (as a PDF file attachment) to the Brides, immediately after you hang up the phone ! – Now, That is good customer service. You can also convert your "Customer Listing" into an Excel file for use by outside Marketing Agencies.
- Franchisees: All important "Business Indicator" reports (such as the Z-Report, Transaction or Billing reports), can be sent out (and be Archived at the destination) electronically.
- File Conversions: Whether it is your Accountant, your Lawyer, your Spouse, or the Delivery Pool, and no matter which applications they are running, transmitting Visual Ticket output is not only possible, but it is also very easy.

It is Easy To Use. Each time you want to print a Visual Ticket Report the system simply prompts whether or not you want to use the "Save/Send Toolbar". If you respond with No, system runs the standard Print Preview screen.

In order to activate the "Send/Save Toolbar", the "Output" of the report must be set to "Preview" (in Print Job setup of Local Connections). To turn the feature On (or Off) on each session, the "Send/Save Toolbar" checkbox (in "System" tab of Session Defaults) must be checked, as well.

For Excel conversions, if you need to use the output as an "Excel Spreadsheet" (with data placed inside individual cells, instead of inside text boxes)), then you need to check the "Full Plain Excel Output" checkbox in the "Export to Excel" form that follows your selection from Toolbar.

## Emailing Reports

The "Direct & Immediate Email" feature of the eManager is also available for any Report / Listing contained in the Report Launcher.

This means, you can EMAIL any Report / Listing directly to a customer (or to any other email address) Directly & Immediately by checking the new checkbox labeled "e m a i l" that is located at the bottom of the Report Launcher before you click the Run button.

This powerful feature uses the same Direct Email Transport modules used in the Billing Module's eMail button and as such it requires the "eManager" and the "Power Module" features to be available on that station. Please consult your Visual Ticket Sales Rep. to add these features to the station of your choice.

For the contents (or the body) of the email itself, it uses the "Billing / Direct Email Template" accessed by clicking the "Template" button that is located at the bottom of eManager Setup form (or at the bottom of Billing Module in the Email section).

# Micro Florist Reports

The Micro Florist System (MFS) offers numerous useful Reports, since printing reports is one of the main functions of the Micro Florist System, as the "Keeper of Posted Databases" (Database Container).

You will probably be referring to the Micro Florist section of your Report Catalog more than the other sections, simply because of the specialized nature of those reports. To learn about using the Micro Florist Search Engine, and the Advanced Filtering utility, see the Micro Florist Appendix.

Here's quick tour; Start Micro Florist and get to the Main Menu. We will start from the Cash Register menu on the left and work our way to the right (Close menu).

## Cash Register Menu

### Sales Information

- Print Posted Sales Transactions, Enter Time Interval, select the "ALL" option first, and then use "Specific Criteria" to obtain a filtered list Posted Sales transactions for different criteria (sales amount Range, Payment method, etc.. Leave the "Advance Criteria" option for later.
- Print Sub-sales Listing for Local Delivery "D", Wire-In, or Wire-Out. Select 1,2,3, .. for the !W account to select sub-sales for different wire services (FTD, Teleflora, and Bloomlink).
- Print Item Sold options 1 thru 6. On each one try the different options to your Sample Reports.
- Print the Sales Summary and Advertisement Tracking Reports.
- Deliver Tickets: Search Engine blinks on a Recipient Delivery Ticket.
- Whenever you see the Search Engine blinking on a record, press Spacebar for Help. You will notice Function Keys F6 and F8 always generate reports.
- Press F6 and print the Delivery Tickets. Press F8 and print the Delivery Reports for a specific Time Interval.
- Print Invoice / Receipts. There is not much of a Report here, but this was the main Billing utility for Printing and Tracking Invoices (before Visual Ticket).

## Transactions Menu

- Customer Transactions. Search Engine blinks on a customer account. Locate a customer that you know has had purchases and payments.
  - Press F8 and print samples of the "Sales Details", the "Transaction Details" and the "Summary Report".
  - Press F6 and print a Listing of all/specific customers. Make sure you print both versions of the "Trial Balance" and "Customer Setup" reports. You may wish to select the Balance range of $1 to $999999 so that you don't waste paper listing customers with $0.00 balance.
- Past Transactions. Reports here would be more useful if you have already entered a few Cash-Outs (in VT Admin menu) or Customer Balance Adjustments (Power Module #9), Employee Punch In/Punch Outs, etc.
  - For General Ledger printing, in order to reduce unnecessary pages, select "For a specific Account" option and use !CU for Customer Account, !CH for "Checks in the Register Account", !CA for Cash and so on. You can see the lost of Account_Id on the Balance Sheet (see below).
  - Select each of the Sub-Trans options on this menu and print the corresponding report.
  -

## Financials Menu

- Print the Balance Sheet. Print all available options for Expense/Income Reports. Print the Inventory Report (for ALL items).
- Income Statement – Select this option often and let the system update the Income Statement (so that you can use Power Modules #7 (Charts Module) to chart your sales for the last 5 years). While at it, press the F6 button to print the Income Statement Report. Since Micro Florist is no longer used for Accounting, the only significant figure on this Report is the Revenue figures.

## Services Menu

This menu is probably the most important section of the Micro Florist as far as reports are concerned.

- Billing. Like the "Print Invoices / Receipt" selection on the Cash Register menu, there is not much of a report here (per se), but this used to be the Main Billing module for printing Statements (before Visual Ticket). You may want to print couple of sample Statements just to have them in your Report Catalog.

- Management Quarterly Report: was used to mainly for Payroll and Business & Occupation Tax Reporting back when the Micro Florist was used for Accounting & Payroll.

## Wire Service Reports

- Wire Service Reports: Are used for reporting wire-ins and wire-out transactions to Wire Services. These reports are still the only mechanism by which you can do that, especially if you are not using the Dove or Mercury agents to automatically report Called-In orders via INC or REC messages, respectively. To print a sample report for your catalog, make sure you specify Yes for Printing and Yes for "Batch Mode". In this mode the system prints, One copy of Wire-In, and 2 copies of Wire-out reports (one with Mercury or Dove transactions, and the other without, to be kept for your files) for each Wire Service,. You can then fax the wire-in report to the wire service.
- Reciprocity Reports: These reports used to be very much in demand a few years ago when retail florists used to go the extra mile to establish Reciprocity among shops who actually reciprocated!

## Occasions Reminder Reports

- If you are entering Special Occasions for customers, then this report comes real handy by letting you know in advance, which occasions are coming in the next few days (in case you want to call them up as part of a Marketing Campaign). Of course, the new Mail Merge Power Module blows this module out of the water for handling Occasions Reminders in a much more elegant manner. But still, you may want to print the sample report for the catalog.

## Customer Management Reports

- You may find some these reports quite interesting and useful. There are all kind of reports available here. Try the Purchase / Payments series of reports to obtain an overview of customer account activity. The listings of customers based on "Amount of Purchase", "Last Purchase Date", etc. provide you with the insight on which customers require more marketing attention. The Account Setup Reports, lets you filter out customers who have been setup with Auto-Discount, No Tax, No Billing, etc., so that you can quickly spot a customer that is setup incorrectly. The Marketing Tools/Labels selections on this menu have been made obsolete and replaced by the Mail Merge Power Module in Visual Ticket.

## Employee Reports

- From the Services menu, move over to the Setup menu, and select Employees. When the Search Engine is blinking, press F6 and F8 buttons to print Time Sheet Reports and other Employee related reports. Please note the VT version of the Time Sheet Report is now available in the Report Launcher.

# Chapter 6

**Recommended read for:**
1) System Manager
2) Manager
3) Drivers and Designers.

## Order Tracking

### Overview

Order Tracking refers to selecting a group of orders in order to "process it". The word "processing" here refers to doing what need to get done, as part of your shop "Operations" to "finish" the order. You may track an order for Production, or for keeping its Delivery on schedule, or following up on a Problem that needs some kind of resolution.

Both Production and Delivery Tracking are optional and thus do not hold up an order form getting Submitted or Processed.

Most medium and larger shops perform Delivery Tracking, and about half of those also perform Production Tracking.

Some shops have dedicated VT Stations located on the counters at the Design Room dedicated to be used by Designers for Production Tracking. Most of these highly organized high volume shops, use Barcode Scanners to speed up the production process. Some don't even use paper (work tickets and barcode). They just work off of the computer and build the arrangements directly from the Production Tracking screens.

We recommend that you should go at your own pace. Take your time and implement one tracking module at a time until the project is fully implemented before taking the next step.

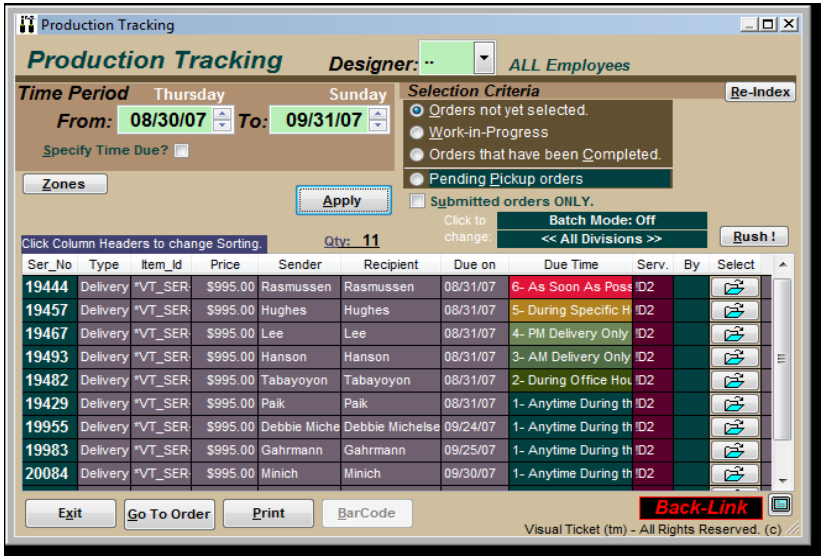
If you are considering any kind of tracking, you should definitely consider getting yourself couple of barcode scanner.

Refunded orders are not included in Delivery and Production tracking utilities (when both "Qty" and "Delivery Charge" numbers are negative).

### Production Tracking

All local orders that require production (such as Pickup, Delivery and Wire-In) orders can be tracked with respect to the status of their Production status.

Production orders are first Logged in to the system (indicating Production has begun by a Designer), and then Logged out (indicating Production has been completed). The information entered becomes available in "real time" to all Order Entry stations (in case of customer inquiry about the status of a certain order).




An Order Entry station's main task is obviously entering orders. If you have not dedicated a station for Production Tracking, then one of your existing Order Entry stations needs to be time shared and be made available for Designers to update Production Status.

For optimum performance, a "Production Tracking" station in the Design room would be ideal, so that Sales Operators would not compete with Designers for access to a VT station.

If you have installed a VT station for each Designer, then printing of Work Tickets may no longer necessary, since the Designer can look at the Work Ticket directly on the Prep Form itself on the computer screen.

The following is the recommended procedure for maintaining Production Status. For the sake of argument we assume you are a Designer.

Column #1 contains Line Item Serial_No which is only 5 characters long, Instead of the Trans_Id, which was 20 characters long.

## The Default Sorting

The column "Due Time" contains time of delivery options such as "1- Anytime during the day", or "2- During Office Hours", etc. You can sort the table by the "Time Due" column (like any other column by clicking the column header) and organize your Production / Deliveries according to "Time of Delivery" of orders. This column displays each of the 6 Time Options in different colors in Descending order so that URGENT ones are on top. For example option "6- As soon as possible" shows in bright RED and will appear first.

The Default Sort for the orders appearing on the Production / Delivery Tracking utilities is as follows:

- When multiple days are selected, the OLDEST Due Dates appear on top.
- Then within each day, the "Highest Priority" Due-Times appear on top.

The above sorting applies only to "Orders Not Yet Selected / Delivered" option. For other status options, "Sort By Serial_No" is the Default Sort. Of course you can always change the sorting by clicking column headers.

Please note priority assignment on Due-Times is based on the number that appears at the beginning. For example "1- Anytime During the Day" is lower priority than "2- During Office Hours".

You may modify the "Due-Time Priorities" using the "Delivery Times" Setup under "Drop Down List #1" tab of the Setup Manager.

## The Procedure

- From the "Operations" menu, select "Production Tracking". As soon as the Production Tracking form is activated, it automatically retrieves all items that need to be "Produced" (made) today.
- The procedure is simple as, clicking on the Staff_Id dropdown box, and selecting your Staff_Id. You can expand the Date Interval, to see items that need to have been made since yesterday, but usually you would only be interested in items that are due today (unless you have unfinished arrangements from the day before, that you need to still complete today). One thing that you may want to do is to click on the "Specify the Time Due", and see items that need to be made for "AM deliveries" first. Once you have the selection criteria, just the way you require it, than click on "Apply".
- VT pulls up the list of items that need to be picked for Production, sorted by their Price. Click on the "Select" button for the arrangement you want to make. The "Prep" form pops up. Click on the "Made By" dropdown, select your Id. Click on the "Start" button's shortcut (labeled with an '1" and "2"). The system inserts the current system time. Click on the "Accept" button, and the line disappears from the grid (since it no longer belongs there). You can use shortcut "Alt-1" and "Alt-2" to insert the start and finish times. If you prefer to "Multi-Task", click on as many arrangements as you like to make simultaneously.
- Once you have finished the arrangement(s), come back to the VT terminal. This time select the "Work in Progress" criteria. VT lists all the orders you have started, but not yet finished for today. Select each one, and on the "Prep" form, click on the shortcut button for "Finish" (Alt-2). VT inserts the current system time into the "Finish" field, now click on the Accept button, and the item disappears from the list (goes to the "Completed" list)
- Please note that the "Work-In-Progress" listing is Due-Date dependant. In other words, if you have unfinished arrangements from yesterday they will not show up in Today's list. In order to also include unfinished business from the day before, you need to expand the Time Interval to also include the day before.
- Now, if you check the "Orders that have been completed" radio button, you will see all the arrangements you have finished today.
- If you need to remake an arrangement, select it again from the "Completed" list, and clear the Finish Time (right click on the field). This will put the item back into your "Work-In Progress" list.
- If you need to delete a certain arrangement that is currently in your "Work In Progress" list, select the item, and clear the Start time (right click on it). The item will now go back to the "Items to be Made" list.
- Please note that the information you enter here, becomes available to all other VT stations in real time. So, if a customer calls, any operator can report the Order status as to whether or not the Production has begun, and who is working on the arrangement (in case the customer needs to make changes). In

case a customer calls and make changes, you need to check the Print Request checkbox to print an updated Work Ticket (an advantage for paperless shops).

- To see the combined Status of both Production, as well as Delivery Tracking information, please check the "Production & Delivery Status" selection on the "Operations" menu.
- Please note that if you use "Barcode Automation" for tracking orders, the Barcode feature automatically retrieves a specific order, regardless of which list the arrangement is currently listed under. A huge advantage when there are there are many orders to seep through.
- Also, please see "Barcode Automation" section for automating entries into Production Tracking fields using Barcode scanning only (no keyboard) for maximum throughput.

Please note that on this form the "Go to" button allows you to locate the order on the Order Pad, so that you can look at the entire order, and make changes if necessary.

Another very important feature is that grid columns on this form have "Dynamic Sorting" capability. You can sort the entire grid (ie; Production Tracking Records for each session) by the contents of a certain column by simply clicking on the "Header" of that column.

## Changing Due Dates

Of course, you can always change the Due_Date for "current" or "Standby" orders from the Combined or Prep forms, since the Due_Date fields are not "Disabled" for such orders.

However, based on many requests from Visual Ticket users, we have provided the means to change the DUE_DATE even after the order is LOCKED (ie; Submitted, Processed, or Archived) from the order pad or during the Production Tracking operations.

But since it is the Due Date that determines whether an order is Standby or ready to be Processed, changing the Due Date after the order is already Processed can cause a little confusion. This is why the system prompts for the Manager / Supervisor over-ride (requires the Master Password) when changing the Due Date on Processed (or Archived) orders.

- In order to change the Due Dates for any Processed or Archived order from the Order Pad, go to the Prep form and click the "Adjust" button (which is located between the Due_date1 and Due_Date2 fields).
- If you need to change the Due Date during Production Tracking operations (from the Prep form), you can click the above "Adjust" button, to "Re-Enable" (or Activate) the Due_Date fields so that you can change them.
- If you need to change the Due Date during Delivery Tracking operations (from the Deliv form), you can click the "Adjust" button locate between Delivery Date1 and Delivery Date2, to "Re-Enable" (or Activate) the Delivery Date fields so that you can change them.

Obviously, having a "processed order that is not yet due" is inconsistent with one of the main Visual Ticket principals which says:

- All Processed orders must have already been Paid, became due and thus Submitted, before they could have been Processed (Posted).

However for purposes of FLEXIBLY in Production Tracking operations, the system allows such an inconsistency under controlled conditions (Manager Approval)..

As a result you may have a Processed order which becomes due sometime in the future (like some of your Standby orders). But the system will obviously not consider a Processed order as a Standby order (even if the Due_Date is changed beyond the Standby Parameter). The order will still look like a Processed order.

- A Processed order will always remain a Processed order, regardless of the Due date.

For this reason, the Supervisor Approval (level 2 of Mater Password) is necessary to verify that the Manager is knowingly introducing this inconsistency to the order in question. Also please note the following rules;

- If you change the Due_Date of a Submitted order (beyond the Standby Parameter), the order is automatically un-submitted and then changed to a Standby order.
- Changing the Due Date (during Production Tracking) DOES NOT automatically change the Delivery Date (for Wire-in or Delivery orders). This is strictly for Designers doing Production work. To change the Delivery Date (for Drivers) please see Delivery Tracking section.

## Planning Reports

The "Print" button located at the bottom of the Production Tracking form provides you with access to the Planning (Material Requirements Planning) and Order Pad Sales Transaction reports, via the Report Launcher.

## Recipe Production

### Entering Production Mode

- When the "Production Mode" checkbox (located on the lower right corner of the Recipe form) is checked, the module adds a secondary Qty column and allows you to enter Qty Used against the original Recipe Qty (or Qty Needed) to determine the "Under / Over $" amounts during the actual Production (making of the item) or as an Alternate Recipe scenario.

The "**Production Mode**" checkbox is enabled (available) ONLY when you access the Recipe form from the "**Prep**" form (during order entry or production tracking activities).

When the Recipes are accessed from the Inventory Profile (or the Event Worksheet) the Recipe form is mainly for the Setup (or Lookup) of the Recipe List (in which case there is no order pending, to make production even relevant).

- As you check the "**Production**" checkbox and the second column is added, if there are residual numbers from the previous session, you are then prompted to "**Reset Used Qty to zero?**" (so that you can discard the previous session's numbers and start fresh).
- Once you enter the Qty Used figures, the "Recipe Total" vs. the "Qty Used Total" fields are updated and the Under/Over $ is calculated based on these two numbers (thus the original Price of the parent Item is no longer in the formula - here we are strictly comparing the two different Qty scenarios).

You can REGISTER (or POST) your Production activity by clicking on the "**Register**" button. When you click this button, the Qty_On_Hand figures for the Recipe Items in the Inventory database are REDUCED per the "Qty Used" figures (times the line Item's Qty Sold) in "Real Time" and the Under/Over is registered the Designer.

The button caption then turns to "**Registered**" and the button is disabled (so that you can not Register or Post it again).

- Please note that when the Production mode is Turned On, the "Recipe Report" also adheres to the same calculations rules and allows the Designer to register the Under/Over of his/her production work, by printing a copy of the "Recipe List" with the "Qty Used" vs. the "Qty Needed" figures and the associated savings (or loss).

Since Processed orders (by the Process Agent), are already Reduced during Processing (per the Recipe list of the item), the "Register" button on the Recipe form will read "**Registered**" and can no longer be clicked (to prevent Double Reduction).

### Updating the Recipe with Qty Used

If the Qty Needed and the Qty Used columns have different figures, a new "**Update**" button appears next to the "**Production**" mode checkbox which allows you to update the Recipe (or the Needed) Qty with the Qty Used figures, and resets the Qty Used figures back to Zero and closes (hides) the Qty Used column, thus updating the Recipe Qty with the latest Qty Used numbers.

### Recipe Reports for Production

The combined "Material Usage" listing is available for an entire order during Production Tracking (Prep Form) sessions. By clicking the "**Recipe**" button (located in the "**Status**" area of the Prep form), you'll have the option to either print the "Recipe List" for the Line Item, or print the "Material Usage" for the entire order (based on Recipe Items assigned for each item)..

This option is presented only when there are more than one line-item in the order. The combined (PRICE X QTY) of all "Recipe Items Used" is then compared to the TOTAL (before tax) of the entire order.

For more information please see "Inventory Recipes" in Chapter 9 (Inventory Admin.).

## Pickup Orders Tracking

The Production Tracking Utility also allows you to track all your "Pending Pickup Orders".

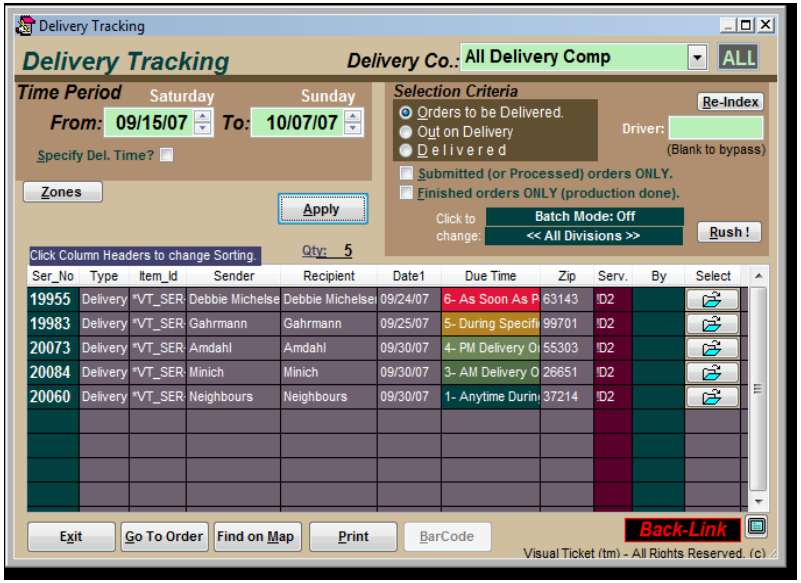
For Pickup orders, the "**Pickup By**" field is left BLANK until the customer comes in to pickup the order. At that time you would

- Select the option: "Pending Pickup orders" on the Production Tracking utility.
- Click on "Select" to open the "Prep" form.
- Enter the name of the person picking up the order into the "Pickup By" field.
- This removes the order from the List of "Pending Pickup Orders"

Thus allowing you to track orders that are waiting to be picked up (on the day the orders are due for pickup).

# Delivery Tracking

All local orders that need to be delivered (ie Delivery and Wire-in orders) can be tracked with respect to their Delivery status. Delivery orders are logged in (indicating Delivery has begun by the Driver), and Logged out (indicating Delivery has been made). The information entered becomes available in "real time" to all Order Entry station.




Order Entry station's main task is obviously entering orders. If you have not dedicated a VT station for Delivery Tracking, then one of your existing stations needs to be time shared and be made available for Drivers to update the Delivery Status. For optimum performance, a "Delivery Tracking" station on the "Driver Counter" would be ideal, so that Sales Operators would not compete with Drivers for access to the VT station.

## The Procedure

The following is the recommended procedure for maintaining Delivery Status. For the sake of argument we assume you are a Driver.

- From the "**Operations**" menu, select "Delivery Tracking". As soon as the Delivery Tracking form is activated, it automatically retrieves all items that need to be "delivered" today. These items are sorted by Due Date first, and the Recipient's Zip code second.
- Click on the **Delivery Company** that you represent. Adjust the Time Period only when you have incomplete deliveries from the day before. Select "Specific Time of Delivery" if you need to take out deliveries for a certain "Time of Day". Once you are done, click on the "**Apply**" button.
- VT pulls up the list of items that need to be delivered by you (as selected by the operator during order entry). If there is more than one Driver in your company, the system allows you to enter your name. Click on the "Select" button for the arrangement you want to deliver. The "Delivery" form pops up. Click on the "**Start Time**" shortcut (labeled with "1"). The system inserts the current system time. Enter your name in the "**Driver**" field. Click on the "**Accept**" button, and the line disappears from the grid (since it no longer belongs there). Click on as many arrangements that you are planning to take on your next trip, simultaneously if you prefer.

### Flora-Map

- Click on the "Out on Delivery" list, and the system shows all the arrangements you have already selected for delivery. If your system has the "Flora-Map" feature, this would be a good time to click on it, to map all the Recipient Addresses for your trip. The Flora-Map lets you know if an address is incorrect (so that you don't get lost out there), and to determine the most optimum route for your next trip.
- Once the Flora-Map interface is activated, click on the "**Link**" button to pull the information from the Delivery Tracking form into the mapping module. Please note that you can have two (or more) different sets of data displayed on the map. One Set could contain "AM Deliveries" and another "PM Deliveries", each set displayed in a different color.
  - To do this, you would first select the "Delivery.dbf" as the point-file first, link the Delivery Tracking data into it.

- Return to the Delivery Tracking form, select "PM Deliveries", activate the "Flora-Map" interface, select "Delivery1.dbf" point-file, and "Link" the current records into this file.
- To run Flora-Map with multiple Point-files, see the section entitled "Flora-Map" section below.

➢ At this point, you have logged-in all the arrangements you are taking on your next trip. If your system is configured to run Flora-Map, you have mapped these deliveries, and have printed the map and have verified that the addresses are indeed correct. You have also connected the Xs on the map and have determined your most optimum Route based on traffic patterns for this time of day. Or you may have printed the suggested Route for the trip instead.

## The Delivery Manifest

➢ Click on the "Print" button to print the "Delivery Manifest Report" for detailed list of Recipient names, and addresses (for each trip). You can use the Delivery Manifest Report to obtain Recipient Signatures, and then use the Barcode labels on the report to quickly update the status of the orders from a single sheet of paper.

### Sorting Options

The new Sort Options are:

➢ Due_Date + Due_Time + Zip (default)

➢ Due_Date + Due_Time + Zip (w/Priority on Top)

➢ Recipient State + City + ZipCode

➢ Recipient ZipCode

➢ Deliv_Srvce + Driver + State + City + Zip + Last_Name

➢ Recipient First_Name

➢ Recipient Last_Name

➢ Recipient Company Name

➢ Recipient Day Phone

➢ Line-item Serial_No

Please note the Sort option #2 on the list places HIGH PRIORITY deliveries on top. This option is consistent with the Default Sort in the Delivery Tracking Utility. The descending sort starts with oldest dates on top with the Due Time starting from 6-, 5- to smaller numbers as they gets closer to the present time.

➢ You can select the Delivery Manifest templates (Manif1 or Manif2) from Local Connections - Print Job Setup.

➢ You can also use it for "Delivery Pool Activity report". Please note that the setup for this report is performed in the Print Job setup section of the "Local Connections" (see Appendix). The Delivery Manifest Report is also available with Barcode labels to facilitate quick "status update" during Delivery Tracking.

You have now printed the map, have decided on the most optimum route, and have also printed the Delivery Manifest report. So, you are now really ready to hit the road !!

## Making Deliveries

➢ You will now make the deliveries, and obtain Recipient Signatures for each successful delivery, and write down the time of delivery on each ticket. For incomplete deliveries, make a note on the back of the Delivery Ticket as to what went wrong, or whether you left the arrangement on the porch, or with a neighbor, and if so, the name and the signature of the person.

### Back to the shop

➢ Upon you return to the shop, you get back on the Delivery Tracking station. Select your "On Delivery" list. Click on the "Select" button for each line, and enter the Delivery Completion time for each arrangement, and enter your notes in "Driver Notes" field. This will remove the item from the "On Delivery" list, and puts into your "Delivered" list. If you are scanning Barcodes, you don't have to worry about locating the orders. Just scan the barcode and the order is pulled up.

➢ When entering the "Driver Notes", the system has a "Quick Status" dropdown box that facilitates speedy entry of the most frequent delivery status verbiage directly into this field. You can select from a list of "Left by the Front Door", :"Left by the Back Door", "Left by the Neighbor", etc. Once the field is inserted, the Status Dropdown box disappears. In order to make it visible again, you must "right click" on the Driver's Notes, to erase it.

➢ In case of incomplete deliveries, obviously you need to re-deliver the arrangement on the following day, or the next trip In this case you need to remove the Start Time, (and the Finish time, if there is one), to put the order

back into the "Orders to be Delivered" list. On the following day, you need to select the Time Interval to also include the day before.

- Please note that the information you enter here, becomes available to all other VT stations in real time. So, if a customer calls inquiring about delivery status of an order, any Operator can respond with whether or not the order is "out on delivery", or has the delivery been made successfully? with the exact time of delivery, and if not, then what problems were encountered, or where the arrangement has been placed.
- Please note that if you use "Barcode Automation" for tracking orders, the Barcode feature automatically retrieves a specific order, regardless of which list the order is currently listed under. You can scan the Barcode labels printed on individual Delivery Tickets. But the process is much more efficient where you scan multiple barcodes printed on a Delivery Manifest sheet(s). Please see "Barcode Automation" section for automating entries into Delivery Tracking fields using Barcode scanning only (no keyboard).
- To see the combined status for both Production, as well as Delivery Tracking information, please check the "Production & Delivery Status" selection on the "Operations" menu.

The "Go to" button on the Delivery Tracking form allows you to locate the order directly on the Order Pad, so that you can look at the entire order, and make changes if necessary.

The "Dynamic Sorting" capability mentioned above, also applies to Delivery Tracking records. Meaning, you can sort the entire grid by the contents of a certain column by simply clicking on the "Header" of that column.

## Filter for specific Delivery Zones

In medium to larger operations, Designers and Drivers need to finish orders for certain Delivery Zone(s) at a time. This allows the Driver to load up the truck with all the arrangements destined for the particular part of town the Driver is scheduled for his/her next trip.

To Filter the Production / Delivery Tracking list by Delivery Zones, simply click on the "Zones" button.

Once you select a Zone, the State, City and Zip fields are displayed on the form, and the list is filtered for the particular State + City + Zip area. You can then further fine tune your filtering criteria by changing the contents of State, City or Zip.

To ignore a certain field, enter blank for that field. For example, if you want all the orders destined for the city of Kirkland, enter blank for the State and Zip fields. For orders going to the 98033 zip code, enter blank for the State and the City, and so on.

To select a subset of a certain field, enter partial value. For example, to select all orders destined for zip codes 98033, 98034, 98039, enter blank for the State and the City and enter 9803 for the zip code.

To Cancel the "Filter by Zones" feature, click on the Zones button and select "Cancel" (on the Search Engine), or enter blank for all three Zone fields.

## Delivery Confirmations emails

There is a little "Status Indicator" on the Delivery form (accessed from Delivery Tracking or the Order pad) under the "Status" section which indicates whether or not the "Delivery Confirmation email" (via the eManager) has been sent out on that order.

- The Status Indicator reads "email sent" and it is located right below the "Start / Finish Times" for Delivery Tracking.
- When you click this Status indicator, the system displays the DATE the email was sent, and lets you RESET it so that it can be sent again.

## Batch Mode Automation

For medium to high volume shops, the "Batch Mode Automation" provides speedy and efficient Production / Delivery Tracking mechanism. The "Batch Mode Automation is only available when using Barcode to select and update order status. Once you click on the "Barcode" button on Production (or Delivery) Tracking form, the system asks you whether or not you want to use the "Batch Mode Automation" ?

This question is asked only once each time you open the Production (or Delivery) Tracking form. If you answer "Yes" to enable "Batch Mode Automation", then you are prompted for the Name of the Driver (or the Designer's Initials respectively) and then each Barcode scan automatically stamps the Start or the Finish time (whichever is appropriate depending on the order status) for the Driver (or the Designer) specified (so that you don't have to manually enter the start/finish times).

Once Batch Mode Automation is enabled, a little box displays "Batch Mode" right next to the Barcode button. It indicates whether or not he Batch Mode Automation is activated, and if so, which Driver (or Designer) is logged in. It also acts as a toggle switch. By clicking on it again it activates (or deactivates) the Batch Mode Automation.

Batch Mode Automation eliminates the need for the Driver (or the Designer) to enter his/her name each time, as well as having to specify the Start/Finish times for each order.

It is important to note that Batch Mode Automation uses the current time for stamping the Start/Finish times. So, in case of the exact time of Delivery, it will be off by the time it took you to get back to the shop. Most shops consider that to be within an acceptable margin of error, in favor of getting all the orders done faster.

Batch Mode Automation is terminated either when you

- Enter a Blank barcode,
- Click on the "Batch Mode" label (as mentioned above), or when you
- Close the Delivery (or Production) Tracking form.

### The Rush Button

The "Rush!" button, allows you to quickly "Time Stamp" the remaining orders with an "Approx. Time:" in one single shot. The button is located right above the "Select" column and it lets you;

- Select the approx Time (for the pending action)
- Enter Designer's (or Driver's) name and turn ON the "Batch-Mode".

The Rush! button will then automatically stamp all the PENDING orders with the Designer (or Driver) name and the approx. time you specified.

- Basically you gain speed by paying the cost in approximation in Time.

For example, in Delivery Tracking, you can select "Out on delivery" orders, click on the "Rush!" button, enter the approx. time the orders were delivered, and the Driver's Name. Then, in a flash, all pending orders are stamped "Delivered" and removed from the grid.

The reason we chose the "Rush!" terminology (as opposed to say "Group", or Batch, or "Auto") is to better convey the negative connotation associated with the Time approximations and the lack of accuracy of this method (as opposed to doing each order individually with proper attention given to updating the status of each order). But it gets you there FAST!!!

- Please note that the "Supervisor" Password (Override) is required for this operation.

The Rush! button also allows you to "View results and Make Adjustments" to individual orders that have been Batch processed. This makes the "Rush!" button even more powerful and flexible than before.

You also have the option to perform "Driver Assignments" (or Designer Assignments in case of Production Tracking) ONLY, without actually changing the status of the orders.

Let assume your Driver has just returned from her deliveries and does not have the time to individually Scan and stamp each order to enter the "Time Delivered".

- All she needs to do is to click the "Rush!" button, enter the approx. time of Delivery for all orders on her trip, select to "View Results / Make Adjustment", and quickly make the necessary adjustments to the Time Delivered on certain orders (on the Browse window), and she's done!!

## SQL Select Troubleshooting (Re-Index)

In rare cases when the Index files get out of sync with their associated database files, the sophisticated SQL SELECT operations used in Delivery / Production Tracking utilities can not retrieve the orders. Running a Server File Maintenance updates the associated index files and resolves the problem. However, running Server File Maintenance in the middle of the day is usually problematic, especially on busy days.

As a result the "Re-Index" button has been added to both Delivery and Production Tracking utilities lets you to quickly update the associated index files, allowing you to continue with minimum interruption.

Please note that the Express Re-Index button still requires exclusive access to the Tracking files, so you still need to Stop (or Pause) the agents and close all open Order Pad(s), before running the "Express Re-Indexing" operation. Since the Express Index operation opens only a handful of files to re-index, the operations is faster and more forgiving. Thus if an order pad is still left open somewhere on the network, it simply lets you try again. The Express Re-Indexing requires Employee Access Level 3 or higher.

## Using Delivery Zones as Map Coordinates

The following method is used by a successful Floral Shop Manager, to greatly improve overall efficiency in handling shop's deliveries. He has shared it with us, so that we can share it with you.

Mick uses the City field for the street name, the zip code field for the map coordinates, the delivery price field for the delivery price, and the state field for "which city map" is used (since they service about 6 different cities).

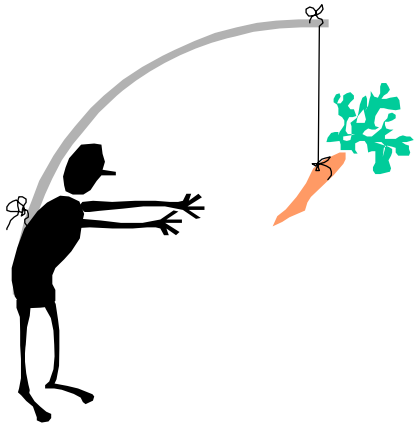
As a result map coordinates are printed on the work/delivery tickets, allowing his Designers and Drivers memorize which coordinates go with which parts of town. Even when the driver has to lookup a certain street on the map, he no longer has to look in an index, since it is already printed (on the ticket) for him.

The reason for doing this, according to Mick, is that a Designer used to first lookup the street in the index (so that she could find it on the map), to determine the production priorities (which order to do next). Sometimes several designers would lookup the same exact order! Then the driver would go thru the same exact process again, in order to determine his own routing/priorities.

By putting the grid coordinates on the order, the operator enters the information during order entry, and the Designers/ Drivers can then simply route all the orders, by using the coordinates that are already printed on the tickets.

Mick then provides the following example. He says, in a typical scenario of 3 orders going to "f-7, 2", "g-7, 4", "L-8" and another to "n-4" areas on the map. By using these coordinates, his staff can determine which deliveries have to be done first, so that the driver can deliver them in the order in which he covers the town, and then as the Manager, Mick can spot important trends, such as a large number of orders building up for certain parts of town.

The biggest saving, according to Mick, has been due to the elimination of the need for each employee having to lookup the street coordinates over and over again (in those tiny little map indexes). He proudly claims that by using this approach he has saved his company about "1 hour a day per employee"! We certainly believe that is just fantastic. Maybe this idea can help your operations as well.



## Enforcing Dependencies

You can setup your shop operations such that order tracking is performed by "Enforcing Dependencies". This means; only "Submitted" orders show up in Production Tracking. And then, only "Finished" orders appear in Delivery Tracking. And so on.. Here's how it works:

You activate the "Enforce Dependencies" parameter in "Environment Setup" (from the Setup Manager). This is a global parameter (applies to all stations and all sessions), insuring consistency among all stations. Once the "Enforce Dependencies" is activated the following happens;

- In Production Tracking you will see the "Submitted orders only" checkbox is checked (activated). If you uncheck it, you will notice "un-submitted" orders also added to the listed.
- The same "Submitted orders only" checkbox is also available on the Delivery Tracking form as well as a second checkbox labeled "Finished orders only".
- With "Finished orders only" checkbox checked, the form lists only orders that have been "Submitted", as well as those that have "Finished" their Production Tracking. If you uncheck it, all qualified orders would appear regardless of whether they have been submitted or have been made.

Please note, each time the Production / Delivery Tracking forms are loaded, the Default value of the "Enforce Dependencies" switch is reloaded. This allows the Manager to centrally "control" the behavior of ALL stations, by changing the Default value of this switch (by accessing "Environment Setup" in the Setup Manager from her office).

## Flora-Map

The module that collects the necessary and provides the interface to the "Mapping Engine" in Visual Ticket is called the "Flora-Map". Flora-Map offer the following 3 options for the Mapping Engine separately or simultaneously;

- MapPoint (by Microsoft).
- Streets and Trips (by Microsoft – Low Cost version of MapPoint).
- Street Wizard (by Adept Computer Solutions.

You purchase one or more of the above Mapping Engines based on your preference, map accuracy for your area and of course your budget. However you can set one of the 3 as your "Default" (or Primary) mapping engine.

In order to utilize the mapping engine for the Flora-Map Interface, your Visual Ticket System Configuration must have been configured to include the Flora-Map License. This means that you can not simply install the Street Wizard and expect the Flora-Map Interface to become operational by itself. The System Monitor must be made aware of the Mapping Engine presence, and the appropriate code must be activated to deal with the interfacing issues.

### Automated Interface

The interface between Visual Ticket's Flora-Map and the mapping engines are different based on the capabilities of the mapping engine.

"Automated Interface" means that delivery points are dynamically linked between Visual Ticket and the Mapping Engine, the map is then automatically loaded and zoomed to the Delivery Area.

On the other hand in "Manual Interface", Flora-Map creates an output file (called Delivery.txt that contains the Recipient Information) and copies it to the Default Folder, where it can be easily picked up by the Mapping Engine.

- "Automated Interface" is available for MapPoint and Street Wizard.
- "Manual Interface:" is provided for "Streets and Trips".

### Mapping Engine Defaults

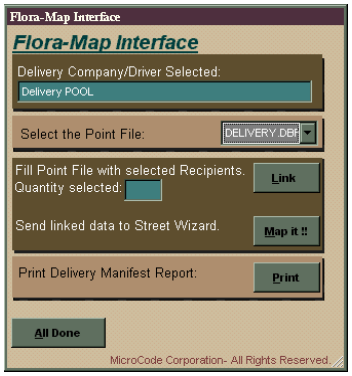
To setup your "Default" mapping engine, from Local Connections, go to "Acc3" tab and select the mapping the engine of your choice from the Dropdown control.

If you are using "Streets and Trips", you can also specify the "Default" folder for where you want the output "Delivery" file to be deposited into. (this only applies to Streets and Trips).

## Using Flora-Map

The Flora-Map is used in following applications;

- Customer Profile to verify Customer Address on the fly.
- During order entry (on the Combined and Delivery forms on the order pad) for verifying Recipient Address on the fly.
- For the Driver in Delivery Tracking form to verify address and plan the trip.




In either case, you can access the Flora-Map Interface (displayed here) by clicking on the **Flora-Map** button.

For "on the fly" address verifications, since there is only a single address involved, the system bypasses the Flora-Map Interface all together and goes directly to the map, and computes the 'Route" (Direction information) from the shop to the address in question, with trip time and distance.

However, in the case of the Driver dealing with multiple addresses and the need to plan the trip during a "Delivery Tracking" session, the system provides more features and options by activating the Flora-Map Interface form.

### The Point File

Each Point File contains the addresses in a certain "trip". You populate the selected Point File (listed on the dropdown) by clicking on the **Link** button. Thus, Flora-Map offers the ability to save a certain "trip" into a different Point File for later use (mapping). However, usually you would only use the default "Delivery.DBF" point file.

### Mapping Procedure

- From the **Operations** menu, select Delivery Tracking, and use the selection criteria such that a few deliveries are listed on the form. Click on the **Flora-Map** button to activate the Flora-Map interface.
- You can select a different Point File to link with the Mapping Engine. However, in this case we will just keep the default Delivery.DBF Point File.
- Click on the "**Link**" button to import the list of deliveries from the Delivery Tracking utility into the Point File. You are then given the choice of whether or not you want to review the selected addresses and further filter the list.
- Once you enter "Yes" to view the Point File, the system opens the Browse window showing the individual addresses to be mapped. The first column is the "**Include**" field. To remove an address from the upcoming map, simply remove the "Y" in this column.
- Click on the "**Print**" button to print the Delivery Manifest Report to take with you so that you can obtain Recipient signatures, make a note of the "Time Delivered" and make notes. Once you are back at the shop, use the Barcode labels on the Delivery Manifest to update the Delivery Status of the orders.
- Now that you have reviewed the list of Recipient and their addresses and have selected the specific ones that you want to map, click on the button labeled "**Map It!**".
  - In the "Automatic Interface" mode (MapPoint and Street Wizard), this button launches the Mapping Engine (if it is not already running), and will automatically start to geo-code the addresses, and putting them on the map. Each address is shown with a little label containing the recipient's last name. The Mapping Engine will then automatically zoom into the area of the map such that all the selected addresses are shown (intelligent zoom).
  - In the "Manual Interface" mode (Streets and Trips), this button creates the Interface file and puts into the "Default" folder (you setup in Local Connection's Acc3 tab). Once the File is created, you would start Streets and Trips, go to the **Data** menu, select "**Import**" and specify "**Text File**" with "**First row contains Header Information**" checkbox.
- Once the Mapping Engine loads the map with the Delivery Points zoomed in and the Routing Information (if requested), then you may want to go to the **File** menu, and Print the map to take with you on your trip.

Once you have zoomed in/out, and printed all the applicable routings, and maps, you may simply "minimize" the Street Wizard window and return to the Visual Ticket screen.

# Mapping Engines

## MapPoint

Once you install MapPoint, there is not much more you need to do.

Clicking on the "Map it" button, activates MapPoint, establishes Dynamic Data Link, transfers the information, performs the Geo-Coding, and computes the Route (Directions) if and when requested.

## Streets and Trips

As mentioned above, due to the limited features of Streets and Trips, the interface is provided in the "Manual" mode, where the Flora-Map creates the output file (Delivery.txt) and copies it into the default folder (which is setup in Local Connection's Acc3 tab).

Then when you are ready to map the points, you would pull up Street and Trips from the Windows Taskbar, go to Data menu, and select "Import".

Make sure you specify "Delimited Text File" for File Type, and click the "First row contains header information" checkbox.

The Delivery points are then displayed on the map. There is no capability to automatically compute Routes or perform Intelligent Zoom via Dynamic Data Link in this case.

## Street Wizard

Street Wizard can also generate Point-to-Point Routing, as well as having the entire US map on a single CD. In order to have Street Wizard determine the "Routing" between two locations, click on the little Red Car icon on the toolbar, select "By Mouse", then point to the first location, followed by the second location, and the system will draw a Yellow route for going from the first location to the next, and so on.

### Street Wizard Installation

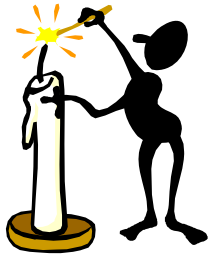
Street Wizard is a 32 bit Native Windows application that performs the mapping functions of the Flora-Map interface

In order to install Street Wizard, select the specific station that is configured to run Flora-Map (see Station Configuration under VT Setup menu). Insert the Street Map CD (the one that is drop shipped to you directly from Adept Computer Solutions) into the CD drive.

- For the installation disk, you MUST select the same disk drive that Visual Ticket is installed on. If an update floppy accompanies the CD, please insert the floppy into the floppy drive before you start the installation of the Street Wizard.. If during the installation you were prompted whether or not you should install ODBC drivers, select "No".
- Street Wizard must be installed in c:\MAP folder (and not the default c:\mapdata or any other folder). Otherwise the Dynamic Link between the Flora-Map and the Street Wizard will not be established.

Once the installation is completed, open the Street Wizard window, and zoom in to your specific area of the country. Please remember that the Street Wizard CD must always be in the CD drive (unless you have chosen the option to install the entire CD on to your hard disk), when using the Flora-Map Interface.

Please review Street Wizard's manual that accompanies the CD, and learn your way around the map, zoom in and out, print maps, and some of the other simpler functionality of this very powerful application.



## Problem Tracking

Problem assignments are made using the "Other Info" button on the Order Pad. Each problem folder, reports to a "Line Item" and not the entire sale. In other words, on one order with 4 line items, you may have Problem folders on Line items #2 and #4 (ie separate folders for each line item).

### Procedure

Please note that you can define your own "Problem Codes", and "Problem Priorities" in the Setup Manager's Drop Down List setup. To assign a "Problem" to an order, locate the order using either the Search Engine, or the Browser. Click on the "Other-Info" button and then click on the Problem Tracking grid for the line item having the problem.

The Problem Tracking form is activated allowing to enter information on the nature of the problem and the corrective action you deem necessary to resolve it.

After problems have been assigned for each line item, you can then "Manage" the Problem Folders from the Operations menu. When the Search Engine is accessing the Problem Folders database, you can sort and search by order's Master Id, Sender's phone number, Problem Priority, and the Problem Code you have assigned to the orders. When you highlight a Problem on the Search Engine', the Problem Description, and the Staff_Id of the person assigned to the Problem is displayed on the form. Please note that on this form the "Go to" button allows you to locate the order on the Order Pad, so that you can look at the entire order, and make changes if necessary.

### Purging Orphan Problem Folders

Please note that Problem Folders can live even after the order has been purged. See "Environment Setup" (in "Setup Manager") for system setup with respect to deletion of "Orphan" problem folders. Based on this parameter, either the system will automatically delete "orphan" problem folders (ie Problem folders for which the original order has been purged), or to keep the "orphan" problem folders, until you decide as to when to delete Problems based on whether they have been resolved.

While accessing Problem Folders, you can modify the "Notes" field on the order. You would keep the Problem Folder until it is resolved. Once it is resolved, you would check the "Resolved" checkbox and enter the date on which the problem was closed. You can either delete the "Problem Folder" at this time, or keep it, and have the system automatically delete it, when the Order is purged (if the Orphan Delete parameter is .enabled- See above).

## Using Barcode

The Barcode Feature must first be licensed by Visual Ticket, and configured on a given station, before it can be used (see Station Configuration on the Setup menu). Once your system is configured for Barcode Interface, you must enable it for each session. You would do this by going to the Setup Menu, activate the Session Defaults, access the Order Entry tab, and then check "Enable Barcode Interface".

### Barcode Manager

The Barcode Interface in Visual Ticket does far more than just allowing you to print barcode labels for inventory items and then scanning them during order entry. It also allows you to track orders and automate your Production / Delivery Tracking operations. The Barcode interface has two separate and distinct modules.

#### Barcode Printing

The first module (referred to as Barcode Manager) has to do with actually printing the Barcode labels. When the Visual Ticket system is installed, the Setup Wizard actually adds special Barcode fonts to your Windows System Font collection. These are Third Party fonts licensed to Visual Ticket for distribution to Visual Ticket users.

The "Inventory Administration" (available on the Administration menu), has the capability of printing barcode labels for a specific item, or for all items. The system prints the labels formatted for Avery label form #5267 stock, which is available from any office supply store.

There is also support for Hand-Held Labeler Printers such as the Brother QL-500, where it allows you to print one label at a time from a Roll of labels.

As a result when printing Barcode Labels from the Inventory Admin. Page, you are presented with the following options:

- Laser Printer - Avery form: 5276
- Labeler Printer - Roll of: 2/3" X 3/7/16'"

#### Choosing the Font Size

When printing Inventory Item "Barcode Labels, you can specify the "FONT SIZE" for the Barcode Labels (Barcode labels are printed from the Inventory Profile accessed from the Admin menu).

The Default Font Size for the Barcode labels has always been "24 points" font. But you can select Font sizes from 24 points all the way down to 8 point font.

With the 24 point Font, you can fit up to 8-10 Barcode numbers into the Label. However, If you need to accommodate longer Barcodes of up to 15 numbers, then you need to select smaller Font sizes.

Of course, as far as how small of a Font size you can use, would depend on the accuracy and the resolution of your Barcode Scanner.

## Scanning Existing Barcodes

You can scan existing barcodes directly into the barcode field for each item. This applies to items that already have a barcode label on them (like the merchandise you purchase from supermarkets). You can also assign any barcode label you wish. The system automatically assigns a barcode label for any item, by simply "double clicking" on the barcode field.

The Barcode Interface prints barcode labels on; w_Tick4 (Work Ticket#4), d_Tick3 (Delivery Ticket#3), s_Lbl1 (Delivery Pool Ticket), s_lbl3 (Shipping Label), Manif2 (Delivery Manifest Report), and Detail1 (order Hardcopy) visual templates. If you are planning to use the tracking features of the Barcode Interface, you need to select the above templates for the various Print Jobs.

NOTE New Barcode Font installed on your system allows you to print barcode labels from any application. For example, you can use "Write" (Windows Wordpad available on your Windows Accessories menu), type anything you need to scan, select it, go to format font, and change the font to "Abri barcode 39a" font. As soon as you do this, the selected items turn into a barcode label!.

The only thing you need to remember, is to start and end each label with an * (asterisk). Here is an example:

Using this method, you can create barcode labels on "cheat sheets" made available to operators, during order entry for any repetitive entry into the system (Driver Names, entries into the various memo fields, etc.).

## Barcode Interface

The second Barcode module (referred to as Barcode Interface) is the ability of each Visual Ticket station to scan barcode labels for selecting Inventory Items during order entry, or scan order Transaction Numbers (printed on various Production Tickets) for locating orders, and automating your order tracking operations.

The choice of which Barcode Scanner to use is entirely yours. The Visual Ticket prints Code 39 format, as well as the UPC format. The scanner brand Welch Allyn, model ScanTeam 3800 is the one we use for development and testing purposes. We found this scanner to be quite effective and reasonably priced. When configuring the scanner, you must set it up for the IBM XT standard and have it setup to add a "Carriage Return" to the end of each scan. This is usually accomplished by scanning a single "Configuration Barcode Label" available in the Barcode Scanner manual.

### Scanning Barcodes

Once you have printed the inventory item labels mentioned above, and affixed them on to your inventory items, you can scan them by clicking on the "Inventory Search" button. The button has a Binocular icon, and is available on the Line Item grid (for Cash & Carry or Pickup sales), as well as on the Prep or the Combined forms (for Delivery or Wire-ins orders). Once you click on this button, the Barcode Interface form is activated. You can either scan the item, or hit the "Enter" key to bypass the scanning of the barcode and access the Visual Search Engine, instead.

For tracking orders based on the order Transaction Numbers printed on various production tickets (as mentioned above), you click on a button labeled "Barcode", available on the Super Search, the Browser, the Production Tracking, the Delivery Tracking, and the Problem Tracking forms (windows).

The Transaction Barcode is made of two lines. You must first scan the first line, and the system will then prompt you to scan the second line. If you make a mistake and scan the second line first, the system clears the scan and prompts you to scan the first line instead. As soon as the Transaction number is scanned, the order is located using a fast indexed search.

## Barcode Automation

Beside the "Inventory Selection", and "Order Tracking" aspects of the Barcode interface, you may also consider "Barcode Automation" applications. "Barcode Automation" refers to using special "Barcode Automation" sheets to eliminate (or replace) keyboard (or mouse click) entries.

You can generate these "Barcode Automation" sheets using your favorite Word Processor entering the applicable sequence of keys, and then changing the font to Barcode fonts installed on your system by the VT Barcode Manager module.

For example to automatically enter the .MGR (dot MGR) password you open your Word Processor, type .MGR. then surround it by two asterisk (*). So now you have: *.MGR*

You would then highlight what you have just typed (by dragging your mouse over it), go to Format menu, select Fonts, and select Abri Barcode39a font with size of 36 points (Regular). The characters will change into a Barcode label. Go ahead print the page, and scan the Barcode label during login. The system emulates keyboard entry and types .MGR right into the password field of the Login screen,

Now, use your Barcode User's Guide and find the Table "Supported Interface Keys for IBM AT". You will see a table as follows:

| Function | Name | Characters | Barcode |
|---|---|---|---|
| Enter | BEL | *$G* | * $ G * |
| Tab | HT | *$I* | * $ I * |
| Alt-make | EXT | *$C* | * $ C * |
| Alt-break | EOT | *$D* | * $ D * |
| Ctrl-make | ENQ | *$E* | * $ E * |
| Ctrl-break | ACK | *$F* | * $ F * |
| More…… | | | |

Ok, now that you know the basics, you may want to insert a table with 3 columns and 10 or 20 rows. Use the first column to describe the function, use second column to indicate the actual characters in regular font, and the third column for the same characters in Barcode font. In order for the table borders not to interfere with the scanner, remove the borders on the last column.

The resulting "Barcode Automation" sheet would look something like this:

**Sample Barcode Automation Sheet**

| Function | Keys | Characters | Barcode |
|---|---|---|---|
| Login Password | .MGR<br>Enter | *.MGR* | * . M G R * |
| Move focus forward | TAB | *$I* | * $ I * |
| Move focus backward | Back-TAB | *$T* | * $ T * |
| Access Line Item menu and add a new item. | Alt-L<br>Enter | *$C L $D* | * $ C L $ D * |
| Print Invoice | Alt-I<br>Alt-P | *$C IP $D* | * $ C I P $ D * |
| Open Drawer | Ctrl-P | *$E P $F* | * $ E P $ F * |
| Save & Submit | Ctrl-S<br>Alt-U | *$E S $F *<br>*$C U $D * | * $ E P $ F *<br>* $ C U $ D * |
| Delivery Tracking (without Driver) | Alt-1<br>Alt-2<br>Alt-A | *$C 1 2 A $D* | * $ C 1 2 A $ D * |
| Delivery Tracking (Driver w/initial C)<br><br>You can make different sheets for different Drivers. | Alt-1<br><br>Alt-2<br><br>Tab Tab<br><br>C | *$C 1 2 $D*<br><br>*$I*<br><br>*$I*<br><br>*$CA$D* | * $ C 1 2 $ D *<br>* $ I *<br>* $ I * |
| | Alt-A | | * C *<br>* $ C A $ D * |
| More…… | | | |

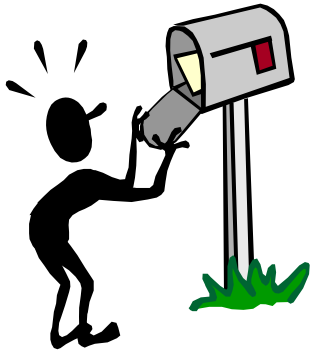
Please make sure whenever you use Alt or Ctrl, you need to first "Make" the key, enter the character, and then "Break" the key (see the contents of the table).

## Increasing Automation

On some of the newer Barcode Scanner models, there is special "barcode" label (in the Scanner's Manual) that adds a "Carriage Return" to the end of each scan (as though you are pressing the Enter key after each scan).

Make sure you activate this important feature so that the scanner can scan each label without requiring you to hit the **Enter** key after each scan.

- To enable this higher level of Barcode Automation, find the Scanner's Manual (it is usually only 4-5 pages). On the 2nd or 3rd page you will see a barcode for "Add CD , LF Suffix". Scan this label and the scanner makes a "Setup" beeping noise.



# Chapter 7

**Recommended read for:**

1) System Manager
2) Manager

## Search Engine

### Overview

As it is said in the software community, the strength of a Database Application is defined by the power of it's Search Engine.

Visual Ticket offers state of the art search capability for locating customers, inventory items, orders, etc through a powerful search engine called the Visual Search Engine. One of the reasons why it is referred to as the "Visual" Search Engine is because while searching for a record, the picture associated with the record is also displayed, helping in locating the desired record (given pictures have been assigned to records). It maybe pictures of arrangements, employees or customers.

### Visual Search Engine (VSE)

Every time you click any "Search" button (with either "Search" label, or a "Binocular" icon) the Visual Search Engine (VSE) is activated.

Here you simply select a field you want to search for, and the VSE locates the record as you type your Search string (hence "Incremental Search").

You can use Alt-1, Alt-2, ... keyboard shortcuts to change the "Search Field".

Once you have located the desired record, press Alt-D (or click on the Done button) to close VSE and get back to the form you were on before you activated the VSE.

Lets assume you are searching for an order by last name of Smith, and you reach the first Smith in the series by typing Smith. However, usually you will be looking for the most recent order by Smith, so in actuality you need to scroll down to the bottom of the series of smiths to locate the most recent order. To do this, without having to scroll thru all the Smiths, simply click on the Last button (with the "Arrow" icon), and the VSE takes you down to the bottom of the series, in a flash!

#### Fuzzy Search Technology

To unleash the power of "Fuzzy Search" technology, click on the button located on the upper right corner of the Visual Search Engine(VSE) labeled "Must Find!". This single button offers you the state-of-the-art power of "Fuzzy Search" technology at you finger tips. As they say, "you are not going to need this button, until you really need this button!!".

The powerful "Fuzzy Search" technology of this module, goes beyond the already powerful "Incremental Search" capabilities of the VSE, by deploying algorithms to search for similar, misspelled, sound-a-likes and so on, where you must find that hard to find record, when it just can't be found by the "normal" search routines.

In short, the advantage of the Fuzzy Search algorithms is that with the higher Fuzziness Factor you specify, the module produces more hits to choose from.

A typical scenario would be; a customer calls and says his last name is Schumacher, and he sounds familiar. You ask for his phone number and he says he has changed his phone number (ie his Account_Id) a few times during the past few months, and he doesn't remember any of them.

You activate the Visual Search Engine and search by last name but you can't find his account. Obviously the last name in the database must have been misspelled. So, instead of giving up, you click on the "Must Find" button, type in "Schumacher" for the last name and the Fuzzy Search module lists 3 similar last names where one of them is "Shoemacker". You click on the "View" button and find out that you have indeed found the correct account, which shows the Customer Account has been suspended with existing balance, due to "Bad Credit"!!. So, this time you ask for "Credit Card Only" purchase and get authorization to clear his Balance with the new Credit card number (thus save money).

When you click on the "Must Find" button, you are presented with the "Fuzzy Search" form that offers up to 12 search fields (in the current table) that you can use to search for a given record. For example, in the case of the Customer Database, you can now search for a given customer if you only know just part of their Address, Credit Card number, Account Notes, Home Phone, Cell Phone, and so on…

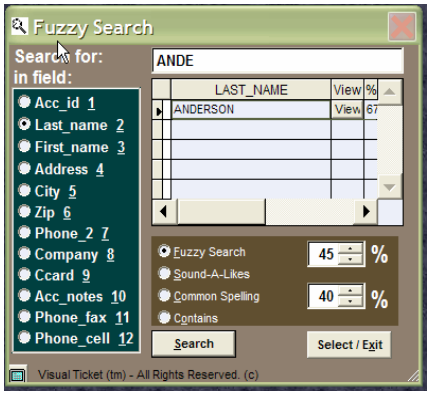
The "Next" button (with the "Right Arrow" icon) allows you to Fuzzy search in all (character) Fields in a given table. So, each time you click on this button, the Fuzzy Search utility lists additional fields (in the table) for you to search in. For example, in the customer database, you can search for customers with similar "emails", in the "next" group of fields.

The Fuzzy Search button offers the following 4 different advanced Search methods;

- Fuzzy Search – "Fuzziness Factor" can be set between 1 and 99.

Higher "Fuzziness factor results in more "hits". This algorithm works well on strings of any size and takes into account all the characters in the Search String, and not just those that contribute to the phonetic representation (more on this later) of the string.

It favors strings that have long runs of consecutive characters that are in common with the data and yet on the other hand, it is forgiving of minor differences in the "word" order.




For example, if you enter "Frankenstein's Bride" as the search string, it returns a high "accuracy score" for records that may contain "Bride of Frankenstein", and lower score for "The Curse of Frankenstein". It basically makes computer searching a lot less rigid and "almost" as though there is "artificial intelligence" performing the search for you...

- Sound-a-like (aka Soundex) Search

This algorithm actually converts your search string and the data in the specific field you are searching in, to a "Four Character Phonetic Code" and then selects those records that phonetically match your search string. Amazing, isn't it?!

This is very useful for a name you might have heard over the phone, for example, and there is a possibility that you heard it wrong.

For example, you may have typed "Shindler List" instead of "Schindler's List", and the Soundex algorithm will find the record for you. No problem…

- "Delta Search" (Similar Spelling to search for misspelled words):

The (Difference) Delta Search algorithm takes the Search String you have specified and compares it to each record in the database and then returns a Matching Score based on the number of "common" characters between the two (regardless of how the strings sounds). It then selects those records that fall within the "Fuzziness Factor" criteria you have specified. Again, lower Fuzziness Factor, results in higher Accuracy percentage of the searching criteria.

- "Contained In" Search Algorithm:

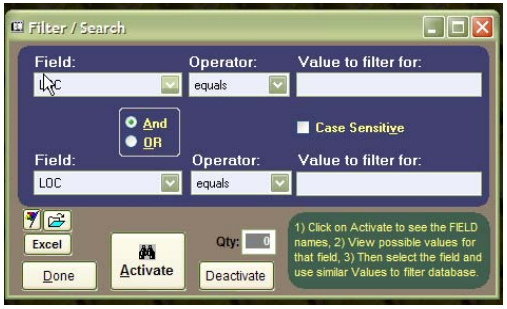
This option is less elaborate search methodology than the other methods above.

It selects all those records that contain the Search String (in its entirety) in each data field. For example, if you are searching in the "Address Field", and you specify "OAK" as the Search String, it selects all customers with "Oak Street", "Oakley Ave", "Oakwood Drive" in their address....

The purpose of having this search method in conjunction with the other advanced Fuzzy Search algorithms, is that the first 3 options are optimized for "longer" Search Strings and do not respond particularly well for a short 3-4 character Search String. So, it is offered here, as a complement to the above techniques when you have to search for a very short string.

We believe that the addition of "Fuzzy Search" technology has been worth the time and the resources spent on it's development, since it puts Visual Ticket's Search Engine capabilities far beyond any other product in it's class. Actually come to think of it, a Point of Sale (POS) System that gathers orders via phone (or in busy and crowded shops with lots of noise), having the "Fuzzy Search" capability is almost a "Must Have".

# The Filter Utility




There is another button located on the upper right corner of the Visual Search Engine (VSE) labeled "**Filter**".

With this button you can set "Specific Criteria" for finding particular records.

It is quite simple to use. You select the first field (for example Last Name in the case of the Customer Database). You would specify the "Contains" operator and enter the string "ANDER" for the filtering value.

Now, as soon as you click on the **Activate** button, the Filter utility displays a list of all customers with "ANDER" in their last names (such as Anderson, Anderhauf, Anders, … etc.).

## The Operators

- equals — customer TYPE_CODE **equals** R (Residential)
- not equals — transaction TRAN_CODE **not equals** O (wireOut)
- is more than — customer BALANCE **is more than** 20.00
- is less than — customer BALANCE **is less than** 5.00
- is blank — customer REFERNCE **is blank** (it is residential)
- contains — customer ACC_ID **contains** 206 (area code)
- not contains — customer ACC_ID **not contains** 206 (area code)
- is inside — customer TYPE_CODE **is inside** REGH
- is between — customer BALANCE **is between** 100.00,200.00

The "**Not Contains**" operator is especially useful when you want to filter AGAINST a common occurrence in certain fields.

The "**Is Between**" operator is especially useful for DATE fields, such as;

CUST_SINCE is between 10/01/2004,10/31/2004 AND

LAST_PURCH is between 11/01/2004,11/30/2004.

## View the Current Values for each field

The two buttons (with "magnified list" icon on them to indicate the "Viewing function" of the buttons), let you view the CURRENT VALUES of the selected field (for each of the two filtering lines). Knowing all the current values for a certain field makes it a lot easier to set the boundary values for it.

For example, you can select the **Field** LAST_NAME2 and before you select the **Operator** or enter the value to filter for, you can click on the "**View Values**" button to decide how to better set the filtering criteria to achieve the results you are looking for.

You can also click on the "**Activate**" button before you specify any fields or enter any values to simply look at the actual data displayed in the Browse window, find the Field (ie the column) you like to filter for, see the actual data contained in that column, then and only then, specify the **Field** (column), the appropriate **Operator** and the "Value to Filter for", in order to achieve the filtering you have in mind.

When using the "**Is Between**" operator, you need to put a comma (,) between the two boundary (low and high) values (such as "10/01/2004,10/31/2004").

## Adding the second criteria

The Filter utility offers you the ability to specify an additional "Selection Criteria" either with an AND or an OR relationship to the first criteria. Let say, we select the AND relationship and specify the Customer balance to be "More Than" $50. Now, when you click on the "Activate" button, the system lists only those customers that have "ANDER" in their last name, and also have a balance of more than $50 in their account.

If you had selected the OR relationship between the 2 criteria, the Filter utility would have listed all customer that have either $50 balance OR have "ANDER" in their Last name.

## Universal Excel Output

Regardless of which database the Search Engine is operating on, clicking on the **Excel** button creates a complete Excel file of the entire underlying database in the Folder of your chose. This is a very powerful File Export Utility that can come real handy when you need it.

## Setting Flags

In the Filter Utility you can select a specific set of customers or recipients (for Mail Merge or Reporting purposes) based on some external criteria (not based

on any information contained in the database fields) by utilizing a special field called FLAG.

By clicking on the button with a **Flag** icon, you set all the FLAG fields in the database to T (True) values.

Then you can browse the database (by clicking on the button with open **Folder** icon), and remove the specific records from the population, by simply changing their Flag values from T (True) to F (False).

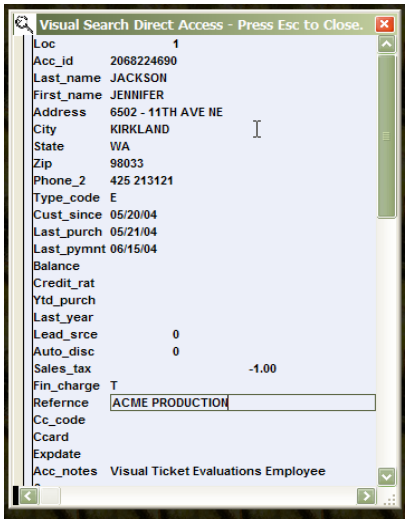
So these 2 additional buttons on the Filter Utility are for selecting specific Customers or Recipients, based on the contents of the FLAG field. As a result these two buttons are only visible when using the Customer or the Recipient databases.

The flag values that you change remain in the database and can be used again in future sessions, as long as you don't click on the Flag button to reset the Flag values back to True.

Once you have set the FLAG values according to your criteria, to activate the filter you would simply scroll down the list of Fields and select the field FLAG, then select the Operator 'Equals" and enter the value of either .T. (for True) or F (for False), depending which set of records you wish to include or not include.

## Direct Access

The Search Engine also provides Direct Access to the underlying Database Record for either viewing or modifying purposes via the **Details** button..




Once you click on the **Direct** button that is located on the upper right hand corner of the Search Engine, the system prompt you with:

- Would you like to bypass system protections and access the RAW data?

In either case, the Search Engine opens the following window where you can actually view (or even change) the contents of each and every field associated with the current record.

Please note that if you choose to "Bypass System Protections" you may damage the integrity of the Database. So, we strongly recommend that you use this function only when instructed by Technical Support.

One of the applications of such direct access may be for example to over-ride a certain customer's Balance without performing any of the "proper" methods available for performing customer balance modifications (such as entering Payments, Sales, or utilizing The "Balance Adjustment" Power Module). In which case, you click on "Details" button, scroll down to the Balance field and enter any number you desire.

Obviously such modification will not be registered anywhere and will be impossible to trace.

# Chapter 8

**Recommended read for:**
1) System Manager
2) Manager
3) Operators

## Customers

In this chapter we present the means of adding, managing and billing customers. The Customer file actually resides in the Posted (long term Micro Florist) Database. So, even though you have direct access to the Customer Database from within the Order Pad, but when you add a new Customer, the customer is added to the Posted Database. However, please keep in mind that the sale you enter for this new customer, will not be applied to his/her balance until later, when the Process Agent posts the sale. So, don't be surprised that when you add a new customer and enter a sale, and choose to bill it to the customer account, the customer Balance remains at $0.00 after you have saved the order.

### Customer Profile

Customer Profile can be accessed from the Administration menu and it allows you to add, modify and delete customers. You can also use the Customer Profile to add occasions, view past history, and enter payment on account.

Use the Toolbar on the bottom of this form to add, delete, search, or perform other tasks. The form is pretty much self explanatory. Please note that while using this form, you are actually accessing the Posted Database in real time. Any changes take effect immediately, and there is no "Posting" involved.

When accessing an existing customer, click on the Search button, but since this button receives the focus automatically as you open the form, you may just hit the Enter key, to activate the Search Engine.

#### Adding a customer

To Add a new customer, click on "Add" button. Click the "Defaults" button, if it applies. Use the "Zip code Search" button, if you have the customer's zip code (automatically fills in the City and State). When adding customers, the only fields that are mandatory, are the Account_Id, First / Last names, and the customer Address.

All the other important parameters, such as Credit Limit, Customer Type Codes, eManager parameters, etc. are inserted automatically using the "Customer Defaults" values setup in System Manager. So before you start adding a lot of

customers, make sure you visit the Setup Manger (under Setup menu), go to Business Tab and make sure the Customer Defaults are setup according to your requirements.

When entering a series of customers in succession, use the "Fast Add" button. This button does the job of the "Save", and the "New" buttons with a single click to save keystrokes.

#### Deleting Customers

To delete a customer, click the button with a big X icon (the Delete button) on the toolbar. Customers with existing balance can not be deleted, unless the balance is cleared out first.

When deleting customers, the system does not verify whether or not there are pending orders in the order pad for that customer (the Process agent refuses to Post any sale that you have deleted the customer),

#### Editing Customers

You can make changes to any unlocked (ie enabled) field (displayed with Black on White background), and then click on the Save button to save your changes. Locked (or Disabled) fields are shown in White on Cyan.

NOTE

The Account_Id for an existing customer can not be changed using the Customer Profile form. See Power Module #10 discussed later in this chapter for this purpose. Since customer Account_Id is the Unique Identifier of a customer's account in the Customer Database, changing it requires that all past (Posted) transactions are updated with the new Account_Id. This is why it requires a Power Module. The Power Module also facilitates changes to a group of customers, when the entire Area code changes.

If you have not purchased the license for Power Modules on your Visual Ticket station, you may still use the F3 function key when accessing the Customer Database in the Transactions menu of the Micro Florist.

The reason Visual Ticket uses the main phone number of the customer for the unique Account_Id identifier, is because, a) it is always known, and b) it facilitates the Caller_Id Interface to be up-to-date with Customer Accounts.

## Adding Customer Photo

You can assign a Picture to a Customer Profile (click on the picture area), or attach a Video or an Audio file by using the Multi-media buttons.

The Picture doesn't have to be the Customer own photo. It maybe a picture that serves as a reminder of that customer (good or bad objects!). It could even be a picture of customer's most favorite arrangement style.

If you have picture files in any of the popular file formats, in a certain folder on you computer (or network), all you have to do to select a picture, is to click on the picture, then move to the folder containing your picture files, and hen point to a specific photo and click to select it. The system remembers this folder for the next time around when you decide to add pictures.

## Customer Setup Form

Use the "Setup" button to make changes to the Customer's setup parameters (billing, discount, advertisement source, etc.). Accessing the Setup button is not mandatory (when adding a new customer), because the Customer Default (setup in Setup Manager) values are used for all new customers. The reason you would want to access the Setup button for a specific customer is because that customer needs to be setup differently than others.

When the Credit Limit (in Customer Setup form) is set to ZERO, the BILLING option (in the Payment form) for that account is disabled.

If you want to prevent a certain account from being billed, enter ZERO for customer's Credit Limit. If you use Credit Limit of $1, the billing option will become available; however it will always require "Supervisor" approval (Master Password Override.

## Sales Tax (or GST) Exempt

Most of the "Tax Exempt" (or GST Exempt) customers are probably not wholesalers, but rather churches, schools, government agencies, or some other sort of charity/non-profit organization. The problem is that their tax exempt certificates all expire at different time intervals.

The problem comes, in the event of a sales tax audit, which is sometimes inevitable in some states. When audited, one must show current certificates for all tax exempt sales during the audit period. For customers with no "current" certificate on file, the tax may have to be paid regardless, plus any penalties that may apply.

The Visual Ticket system tracks and controls the Sales Tax (or GST) exempt status. When you setup the Tax (or GST) Exempt status in Customer Setup form, you can specify the "Expiration date" for the Sales Tax (or GST) Exempt status (as indicated on the tax Exempt Certificate). If you leave the Expiration Date blank, the Tax (or GST) Exemption becomes permanent (or until you change them).

The Nightly agent checks the "Expiration Dates" for all Tax/GST Exempt customers, and automatically changes them to "Shop Rate" if/when expired.

According to one Visual Ticket user, one really appreciates the value of this feature, when audited!!

## The Alternate Customer Id

An additional search-able Customer Id field is available for searching the Customer Database called: Cus_ID.

This is field is 6 characters long and starts from AA0001 and goes up to ZZ9999 before it starts over again. Thus accommodating 25 X 25 X 9999 = 6,249,375 records, before it starts over from AA0001.

- You can always over-write the values that are automatically assigned to the Cus_ID field and enter your own CUSTOM in-house Customer_Ids, as long as these customer IDs do not exceed 6 characters in length. All existing customers are assigned their own unique CUS_ID values starting from AA0001.

The purpose of having this extra (or Alternate) Customer ID field is mainly for searching purposes. As a result, all customer searches in Visual Ticket include the CUS_ID field following the Last_Name, Account_Id, First_Name, Company Name fields (with the keyboard shortcut of Alt-5).

- You can add the Cus_ID field to any of your Custom Reports, Invoices, Statements, or Production Ticket by entering CUS.CUS_ID for the field's "Expression" (in the Report Template Designer). The Combined Work Ticket Templates: w_comb1 and w_comb2 also contain the CUS.CUS_ID field in the Customer section of the ticket.
  - Important: You need to do an "Express Micro Florist Download" to accommodate the new CUS_ID field in the Micro Florist File Maintenance routines. From Setup Manager, please click on "Micro Florist Download" and select "Express Download".

# Setup Initial Balances

If you have existing customers with Initial Balances that you need to setup in Visual Ticket you have the following two options;

- Quick and Easy way. Where the initial balances can only be entered as Current (and not as late 30Day, 60Day, 90Day or 120Day balances). In this case, see Power Module #9 below.
- The more flexible way. If you do need to enter Late balances as such, so that you can charge Finance Charge sooner, then you need use the Micro Florist Transactions menu (see Micro Florist Option below).

## Balance Adjustor (PM #9)

The Balance Adjustor (PM# 9) allows you to select a specific Balance Range (say between -1.00 to +1.00 dollar) and then remove such "residual" balances by replacing them with $0.00 and expensing the net adjusted amount.

As mentioned above, the main purpose of this utility is to get rid of those "residual" balances left over due to Finance Charges billed after the payment was mailed and thus are left unpaid, or fractional balances that don't justify the mailing expenses for collection.

But this Power Module can also be used to filter for a specific balance (ie; a specific Account) and then adjust the balance up or down by a certain amount (by using the Option box for "Replace", "Add", or "Deduct"). Regardless of which Calculation option you use, the net change to the Account Balance is reflected as a "Balance Adjustment" expense transaction in Customer History (using the !S Expense Group and "Exp " Expense Category).

The Procedure to removing Fractional Balance between -1.00 and +1.00 dollar, simply use the default values, and click on "Preview" button. The PM presents you with the list of Customer with their Current Balance allowing you to change the "New Balance" amount for each customer. You can also delete rows that you don't wish to "Adjust" just yet by pressing Ctrl+T (which puts a little Deleted marker at the beginning of the row).

You can then print a Report of pending account changes by clicking on the button with the Printer icon. Once you have all the adjustments just the way you want them, click on the "Execute" button.

### Sorting / Filtering Customers

When "Previewing" the list of customers who require Balance Adjustment, you have the option to "Sort & Filter" the List. You can filter and sort by:

- Account_Id (Default)
- Last_Name + First_Name
- Company Name
- Balance

This is important when you are setting up the initial balances for hundreds of customers. In this case for example, SORTING by the (Last_Name + First_Name) fields could come real handy. Especially when the list that you are working off of is already sort by (last_Name + First_Name).

The LIST of customers displayed when clicking the "Execute" button follows the same Sorting option that was selected during the Preview phase.

## Setting up Customer Initial Balances

Using the **Power Module # 9**, you can setup customer Initial Balances quickly and easily. Here's the step by step procedure;

- ON Power Module #9, check the box "**Include $0 Balances**". Click on **Preview** button.
- Enter the Initial Balance for each customer in the browse window. Close Browse window when finished.
- Click on Print button and verify new balances are correct.
- Click on **Execute**.

That's it!! You're done! You may click on the "Report Launcher" button (upper right corner of PM#9 and print the Customer Aged Listing to confirm the new balances. From Accounting standpoint;

- The Posted balance is added as "Current" balance (and not as late 30 day, 60 day, 90 day... balance).
- The amount is shown as Misc. Income (actually as a Negative Expense) under Expense Group !S and Expense Category of "EXP " in Micro Florist. This is as opposed to a "Transfer From" (the Owner's Capital Account) transaction when you use the alternate procedure in the User's Guide (via Micro Florist Customer Transaction menu).

The **Execute** button allows you to review and confirm the changes one last time and then prompts you for the Master Password (to insure against access by unauthorized personnel).

The default setting of the "Option" buttons is set to "**Add to Balance**". Since this way the values for the "**New Balance**" column are set to the "**Existing Balance**" values as default, forcing a lesser chance to inadvertently reset bunch of balances to ZERO.

At this point the module gets busy and performs all the intended adjustments. You can print the report one more time with the final results, for your records.

If the customer you are setting up in Visual Ticket for the first time, have LATE balances, and you wish to enter them accordingly into the 30Day, 60Day, 90Day and 120Day balances (so that Finance Charge is applied sooner), you should use the Micro Florist Customer Transaction menu for this purpose. Please see the Micro Florist Appendix.

## Voiding Balance Adjustments

Customer Balance Adjustments entered using the Power Module #9 (Balance Adjustor) can be viewed and individually VOIDED using the "**Payment**" button that is available on Customer's History form (accessed by clicking the **History** button on Customer Profile form).

- The Balance Adjustment transactions show up in color Blue (as opposed to Payment Transactions that show up in Brown).
- You can click on any transaction (either Payment or Adjustment), and then click on the **Delete** button to Void it.
- You can click on the **Print** button and view all Payments/Adjustments that posted to the customer's account.

## The Micro Florist Option

This is a more comprehensive option (than Power Module #9 discussed above) for both Adding customers as well as setting up their Initial Balances.

You would use this option if a) you don't have the Power Module License, or b) you need to differentiate between the Current, 30Day, 60Day, 90Day and 120Day balances (for the purpose of accelerated Finance Charge on Late Balances).

### Adding Customer with existing balances

Please note that Visual Ticket's Administration menu provides the MAIN access to the Customer Database, where you can add/modify customers using the more familiar Visual Ticket interface. However, since adding "Previous Balance" is a general Ledger type of operation, we need to use the Micro Florist Transactions menu for this purpose.

### Adding the Customer

From the Main menu, go to the Transactions menu. Select "Customer Transactions". You will now notice that the Search Engine Blinking? on one of the existing customers.

Once you see the Search Engine's Blinking?. Press the Spacebar so that you can see the available options while accessing the Customer Database. The Reporting functions here are very important. Also, the Tab menu (pops up when you hit the Tab key), allows you to enter payment on account (of course you probably prefer to use the "Payment on Account" form in Visual Ticket), and be able to list sales, and transactions.

In order to setup customer's Initial balance, we need to first add the customer to the database. Press F5 to add a new customer. Enter the customer's phone number as the unique account Id. Then enter the first name and last name, followed by company name.

Please note that for companies that you don't want to use an individual's name, you could use "Accounts"(for first name), and "Payable Dept." (for last name). Also, the system does not allow blanks for first and last name, if you want to bypass this protection, you may want to use a "." (dot) instead.

For companies that have multiple accounts, you may want to use the main number with 001 to 999 for the area code. You would then be able to search for these accounts using the Company name.

As you will note that, once you start to add new customers, the customer defaults that you have already setup, are inserted into new records automatically. When you have finished entering a new customer, the Search Engine's Blinking "?" appears again. Now at this point you can press F5 again to add another customer, or you can hit the "Enter" key to select this customer for adding a transaction using his/her account.

### Posting Initial balances

While the Search Engine is Blinking on the customer have just added pressing the Enter implies that you want to select this customer for further processing.

So, as you hit the Enter key, the Customer account is selected, and the system prompts you for current date and a reference number. Hit the Enter key twice, and the system will present you with "Scrolling Menu". To get back to the Customer page, and cancel transaction entry at this point, you can hit the Esc key otherwise use the Up/Down Arrow key to select the type of transaction.

When setting up customers original balances, we want to transfer money from the "Owner's Capital" account to Customer's Account. This means that the Owner's Capital account (CAP) is the source of all assets/liabilities, when setting up originals balances, or when purchasing the initial inventory. For this reason, press the Up/Down Arrow keys, and locate the "T-frm" or "Transfer From Another Account" type of transaction. Once you locate it, press the Enter key to select it.

As soon as we hit the Enter key, the system activates the Search Engine on the "Account Database". Use the Up/Down Arrow key to locate the CAP account. You may also type "CAP" to select it directly. The CAP account is already setup as Factory Default. If for some reason, you have initialized the system, and deleted all of these factory setup accounts, you can always add it back by pressing the F5 key. If this is the case, use CAP for the Account Id, and enter "Owner's Capital" for account's name. Enter "N" for Asset, so that it becomes a "Liability" account.

Once you have located (or added) the CAP account, and the Search Engine is blinking on it, hit the Enter key to select it. The system prompts you for the amount. Enter the amount that you want posted to Customer's account, and hit Enter. Entering $0.00 cancels the transfer operation.

Once you have entered the amount, the system prompts you for Transaction Description. Enter "Account Setup". Hit the Enter key, and the system will prompt you for Check number and whether the transaction has Cleared the bank. Hit the Enter key twice. The system will then prompt you to specify which of the Aged Balances this amount belongs to. Enter the appropriate number. This will conclude the line item entry.

At this point you can hit Enter again, and select the "Transfer From" type of transaction again, and enter another amount for (for example) the "60Day Aged

Balance". This allows you to put certain amount in 90Day balance and certain amount in 30Day balance, and so forth.

In case you have made a mistake entering the amount for the last line item, you can always press the "Page Up" button to modify the transaction already entered.

If you are done entering the initial balances for this customer, simply press the Esc (or F10) key, and say "N" for entering memo. The system prompts you for "More Entries ?". Enter "Y" to get back to the Customer Database so that you can add another customer (by pressing F5 again).

When you return to the Customer page, before you press F5 to add another customer, notice the Customer's Balance, and the Aged Balances, and verify that the correct amounts have been posted.

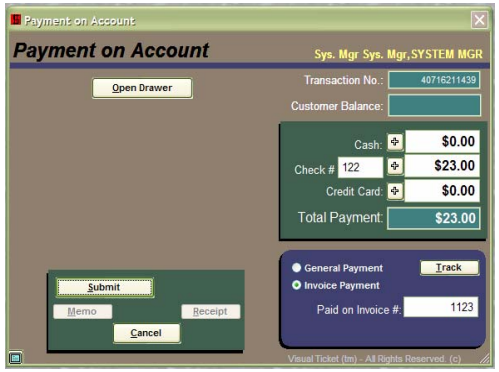
## Verify Initial Balances

Once you have finished entering all customers, you may want to print an Aged Trial Balance Report. While Blinking on Customer Database, press the F6 key. Select "Yes" for printing. When prompted for customer balance range, enter $1.00 to $9999999 (this will only print customer with existing balances).

Of course, you can also print the Aged Balances listing in Visual Ticket's Report Launcher.

# Entering Payments

Use the "Payment" button to enter Payment on Account for the selected customer. The process is pretty straight forward. The Customer's existing balance is displayed. Use the Cash, Check or Credit Card shortcuts to enter the amount (very similar to the Order Pad Payment window). Enter whether or not the payment is made on an Invoice (very important for Invoice Tracking).




Once you have setup the Transaction just right, click on the "Submit" button. This will actually "Post" the Transaction into Posted Database (Micro Florist permanent files).

Please note that Credit Card payment will be authorized via Instant Approval (or the Flora-Credit Server), and a Credit Card slip is printed. You can also print a Cashier's Receipt for the payment. Please make sure the corresponding Print Jobs are setup on station's Local Connections.

### Sent it via email

- If the customer has an email address on file, then you'll have the option to save the "Payment on Account Receipt" (or especially the "Declined Ticket") as a "Stored Message" to be emailed to individual customers during eManager's next Build. All you have to do is to check the "Email It" checkbox (placed above the Receipt button).
- For Declined Tickets, you need to check this checkbox, before you click on the "Obtain Approval" button.
- In case you want to Delete (erase) Stored Messages for all customers, you can go to "Customer Defaults" form in the "Business" tab of Setup Manager, and then execute "Clear all Stored Messages" button. See eManager for details.

## Past Payments

### Void Payments (in Visual Ticket)

The simplest way to get rid of a previous Payment transaction, is to use the "**Delete Payments**" button that is located on the upper left corner of the "**Payment on Account**" form (please note that the same feature is also available on the "**Customer History**" form by clicking the "**Payments**" button).

Once you access the "**List/Void Payments**" form, go ahead and select a specific Payment transaction you want to Void (Delete), then click the "**Delete**" button.

Visual Ticket prompts you with the specifics of the payment, asking for your OK.

### Void / Modify Payments (in Micro Florist)

In order to Void / Modify a Payment transaction, you can also use the Micro Florist utility. From Micro Florist's Main menu, go to **Transactions** menu, select **Customer Transactions**. The Search Engine's "Blinking?" starts blinking on the First customer account (sorted by the field that is Blinking). Locate the customer by enter a few numbers of his/her Phone number, or hit the F1 key to search/sort by Last Name, or F2 key to search/sort by Company name. Then you can enter a few letters of last name or company name respectively. Once you have located the customer and the Search Engine is Blinking on the record, hit Enter key to select the customer. Hit Enter twice to pass the Check# and Posting date.

Now press Up/Down Arrow keys select Void or Modify from the "Scrolling Menu".

#### Void Payment Transaction

Scroll to locate Void and then hit **Enter** to select it. The Search Engine starts Blinking on customer's very last transaction. If that is the transaction you want to void, then hit the **Enter** key to select it. That's all there is to it.

If the transaction being displayed, is not the transaction you want to Void, then use the **Up Arrow** key to scroll thru more recent transactions until you find. You then hit Enter to select it, as mentioned above.

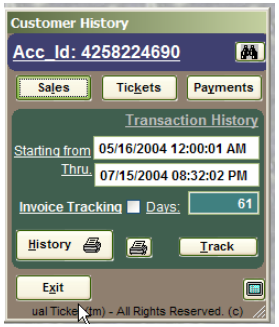
#### Modify Payment Transaction

Everything is exactly the same as Void above, except that you would select Modify from the Scrolling Menu. Then you locate and select the transaction in question. Once you enter "Yes" to modify, keep hitting Enter and the system walks you thru the entire transaction letting you change what needs changing.

## Customer History

The **History** button located on the Customer Profile form allows you to look customer history from different points of view. But one thing we should keep in mind that all History information comes from the "Posted Database", so the date interval can go back for as long as the customer has been on file.

### Customer History Report




This report does it all! It merges both the Payment and Purchase transactions into a single detailed report. You can view Purchases, Payments, as well as Balance Adjustment Transactions (Power Module #9) in their natural order (as they were entered in time).

So, right from the order pad while you are entering customer's order, you can click on the History button, enter a date range and then Print Preview customer entire history (if need be), so that you can answer customer questions.

Using the **Save/Send Toolbar** you can actually create a PDF file and attach it to an email, if the customer needs to view the report, while you are discussing it.

#### Invoice Tracking

The capabilities of the Customer History Report doesn't end there. When you enable the "Invoice Tracking" checkbox, the report shows only "Billed" transactions together with all their associated payment transactions, sorted by the Invoice number. So, you can see purchases and payments for the same Invoice number all grouped together.

When you look closer, you'll find there is an additional line for each Invoice# that provides the status of that invoice showing whether a certain invoice is "Cleared", or is still "Pending", and if it is pending, then show how much is the "Remaining" amount.... A handy tool for those Corporate Accounts.

The make the report even more responsive to your needs, you are presented with a menu from which you can select;

- Cleared & Pending Invoices,
- Only Cleared Invoices, or
- Only Pending Invoices.

Providing you with all tools you need to focus on the job at hand and providing the customer with the exact information needed to troubleshoot situations surrounding late accounts.

### Changing the Printer

By clicking on the button with a Printer icon, you can select a different Printer than the one specified for Blank Paper in Local Connections setup.

If you have installed a Fax driver on your computer, and have a phone line is attached to the computer modem port, then you can select a Fax Driver (instead of Printers) and then fax the report directly to the customer, if the customer does not have email or PDF viewing capabilities on his/her computer.

Windows XP comes with a Fax driver, but it needs to be installed (it is not installed by Default). You may also purchase inexpensive fax drivers such as Winfax or others. For somebody at the office who handles a lot of billing inquiries, the direct faxing capability can save a lot of time.

## Customer Aged Balances

Since customer balances are changed on a daily (or even hourly) basis (when you post payments or process Account Sales), in order to obtain a SNAPSHOT of customer balances at any specific point in time, the system needs to first save an Archive copy of these figures first, in order to be able to print them sometime in the future.

### Saving Archived copies

Starting with Release 09/15/05, each time the system runs the "New Month" routines, it automatically saves a copy of the Customer Aged Balances in an Archive File (for customers with existing balances). You may also save an Archive copy of Customer Aged Balances on a "Nightly Basis" as well.

- To do this, go to the Agents menu, go to the Agent Launcher, and click the Nightly Agent's "Setup" button. Now enable the checkbox "Make a copy of Customer Aged Balances".

Please note when you enable this feature, the system creates a NEW Archived File during each Server Shutdown. In a few years thus can really crowd up the Archive folder and your hard disk. So, you may want to manage that folder, from time to time by transferring (or deleting) some of the obsolete files.

- -The Archive file is named: yyyyMMdd_cus.dbf allowing you to sort the files by the "Year", "Month" and "Day" of the file, and is always saved in the c:\sms\set1\arc\cus folder on the VT Server.
- An example of an Archived file saved today would be: 20050915_cus.dbf

### Printing the Archived copies

Now that the system automatically saves a copy (snapshot) of Customer Aged Balances at the beginning of each month (or every night, during the Server Shutdown as mentioned above) in separate files, you can Print (or Preview) the "Customer Aged Balance Listings" using each one of these Saved Archived files.

So as a result, when you go to the Report Launcher, select "Listings", and decide to print the "Aged Customer Balances" listing, you are prompted to select either;

- The Current Customer File, or
- An Archived copy (saved in previous days or months).

When you the select to use Archived copies, the File Selector allows you to choose from a list of existing Archived..

Please note that the Listing Date of top of the Customer Aged Balances Listing shows the actual date the figures were Archived.

## Global Invoice Tracking

Click on Track button to track an individual Invoice numbers Globally across different customer accounts. You can see all Sales and Payments associated with a specific Invoice Number and obtain the NET balance remaining for the specific Invoice_No. You can use the Global Invoice Tracking utility, either while you are entering a Payment On Account or viewing a certain Customer's History.

Click on the Track button, enter the Time Period you are concerned with, and then enter the Invoice_No in question. Once you enter the Invoice_No, the utility gathers all the data and opens a Browse window displaying all the Sales as well as all the Payments referencing that particular Invoice_No. With the last row showing the amount of the Net Balance remaining, regardless of the Account_Id. Just in case multiple account numbers paid for or purchased under the same invoice number. Which may happens from time to time when different departments of the same company mismanage the paperwork.

You can also Print the Invoice Tracking data for a specific Invoice_No.

## Posted Sales

The Sales button activates the familiar "Posted Sales" form showing the Posted Sales that belong to the selected customer. We have discussed the Posted Sales form under "Repeat Posted Sales" at the end of Chapter -3. Please review that section to refresh your memory.
The most important features of the Posted Sales form are;

- The ability to Search for a specific sale using the Recipient's name, and then view the details of the sale in Browse windows when you click on the sale.
- The ability to **Delete** a Posted Sale.
- The ability to **Repeat** a Posted Sale.

## Posted Sales Browser

As you have probably come to realize the "Posted Sales Browser" is even more important and useful than the Order Pad Browser. The "Posted Sales Browser" which is available either from Customer Profile (by clicking the **History** button), or by selecting "**Posted Transactions**" from the **File** menu, is a window to Posted Sales transactions allowing you to View Posted Sales, Search Posted Sales by Recipient information, Print Posted HardCopy, Repeat the Posted Sale, and Delete Posted sales.

### Posted Sales Filter Utility

The **Filter** button located on top, next to the Search Button on the Posted Sales Browser utility. This feature will come real handy when you like to filter for criteria such as;

- All Invoice Numbers greater than 1233444 and less than 1233450
- All sales greater than $45 sold w.NO TAX.
- All sales "Paid by Cash" that were less than $10.
- All sales from Division #3, or all sales by Station# 2, or all sales by staff_Id:: PW, or....

As you can see it will give you tremendous power to narrow down Posted Sales to meet your very specific criteria.

### Search for Invoice#

In order to search for a specific Invoice_No in the Posted Sale database, you need to access the entire Posted Sale Database (and not just a specific Customer's Posted Sales transactions"). To do so;

- From the File menu, select "**Posted Transactions**", click "**Posted Sales**", and then click "**Select All**".
- From the "**Posted Sales Browser**" click the "**Invoice #**" button. This button appears right above the "Invoice #" column.

The Posted Sale Browser utility will then Filter the entire Posted Sale database to produce any / all sales with that specific Invoice_No.

Up to now for user who are familiar with the "Filtering" utility, know that the same results can be easily achieved using the "Filter" utility. However due to popular demand and the fact that searching by Invoice # occurs more frequently than other fields, the "Filter By Invoice #" now has it's own "custom filtering" button.

### Browsing Details

You can view every detail of each sale's;

- Parent order details,
- Sub-sale(s) details,
- Delivery details,
- Customer details,
- as well as the Inventory Item details !!.

This too is a very powerful feature, letting you view EVERY detail about a certain order.

### Rapid Succession Deletions

When DELETING Posted Sales, you can now check the "**No Confirmation Necessary**" checkbox and then delete transactions in a "Rapid Succession" (without having to confirm each deletion, having to enter the Master Password and getting the "Void Successful" message at the end. This saves a lot of keystrokes and mouse clicks when you have to delete multiple transactions. This way, you can delete each transaction by a single click of a mouse (or Alt-D Keyboard shortcut).

As you can tell, this is a very POWERFUL feature and maybe dangerous in the hands of a Novice user. This is why enabling the "**No Confirmation Necessary**" checkbox requires both Level 4 (System Manager) Access level and the Master Password.

### Accessing the Order (in the Order Pad)

From the Posted Sales Browser, you can GO TO directly to the order in the Order Pad (given the order has not yet been purged, based on your Purge parameter).

To go to a certain order on the order pad (from the Posted Sales Browser), just click on the "**View & Print**" button and select Option #2 from the menu ("Go to the Order in Order Pad").

In other words, you have full linkage back forth between the Order pad and the Posted Sales records for a certain order.
You can go from the Order Pad to the Posted Sale record by clicking the "Posted" button on the upper right corner, and then from the Posted Sales Browser to the Order pad by clicking on the "View & Print" button, as stated here.

## Printing Hardcopy of Posted Sales

You can print a HardCopy of a Posted Sale by accessing the Posted Sales form available from;

- The File Menu -> go to Posted Transactions -> select Posted Sale

To print a single Posted Sale HardCopy selected from a list of ALL sales including Account Sales, General Sales, Wire-ins and QuickCash.

- The Admin Menu -> go to Customer Profile -> Select a customer -> click Customer History button -> click Sales button.

To print a single Posted Sale HardCopy selected from a list of Account Sales for a Specific Customer)

- The Admin Menu -> go to Customer Profile -> Select a customer -> click Customer History -> Ticket button.

To print a single Posted Sale HardCopy selected from a Browse list of Tickets for a Specific Customer)

- The File Menu -> Report Launcher - select "Posted Sales - HardCopy" report. Then enter the Time Period.

To print a SERIES of Posted Sales HardCopy chosen within a specific Time Period
Once you are in the "Posted Sales" form, select the desired Sale transaction (on the grid) and click the "View & Print" button.

### Quick Lookup Windows

Since the lookup functions for these two buttons are in the form of "Browse" windows (instead of a regular report), it provides you with maximum flexibility and the fastest response time, to quickly get to the Last couple of Tickets (or Payments), which is usually the topic of conversation (especially while on the phone with the customer).

The Browse window also allows you to move up or down, right and left in the Delivery Ticket or Payment databases to get to the information you need.

All these tools may seem a bit redundant at first, but when the time comes, you will appreciate the fine distinctions among these different "windows to the customer's past history", and the manner in which you can put your finger right on the information you need, in the shortest possible amount of time.

#### Delivery Tickets

The "Tickets" button displays a Browse window listing customer's "Delivery Tickets" with the last delivery ticket in focus. The button's main function is to allow you to lookup "Delivery Ticket Details" (for answering customer questions on card messages, recipient addresses, wire-out shop telephone or contact names, Delivery information, etc..).

#### Payments

The "Payments" button activates the "List/Void Payments / Balance Adjustments" window listing customer's "Payments & Balance Adjustments" with the last such transaction in focus. The utility's main functions are display "Payment Details" (for answering customer questions on related to Payment amounts, dates, Invoice No. and Check No. quickly) and to allow you to Void (Delete) previous Payment/Adjustment transactions.

The same Rapid Session Deletion feature discussed above for Posted Sales is also available here for Rapid Succession Deletion of Posted Payments & Balance Adjustments

#### Customer Status Window

The "Status" button shows customer's current Aged Balances.

## Accessing Posted Transactions Directly

#### Posted Sales (in time)

You can access "Posted Sales" directly from the File. menu across all Customer Accounts. You can View, Delete (in Rapid Succession) or Repeat them as necessary.

#### From the Order Pad

For Processed (or Archived) orders, you can access the Posted Sale record for the order by simply clicking the "Posted" button on the upper right corner of the Order Pad.

Once you click this button, the "Posted Sales Browser" pops up showing all the Posted Sales, with the focus on the Order's "Posted Sale" record. From there, you can print the Posted Sale HardCopy or Void the Posted Sale Directly.

### Posted Payments / Balance Adjustments (in time)

You can also access "Posted Payments and "Balance Adjustments" directly from the File. menu across all Customer Accounts.

This feature allows you to look at ALL "Payments" and/or "Balance Adjustments" sorted by their "Posting Date", as they were entered for different accounts. You can also Delete Posted Payments and/or Balance Adjustments in Rapid Succession from this menu.

To access, from the File menu, select "Posted Transactions" and then select "Posted Payments / Bal Adjustments" from the following menu. Select "No" for choosing a specific customer in order to see ALL Payments / Balance Adjustments across all Account_Ids.

## Accessing orders in the Order Pad

Located at the bottom of the Customer History form, the button labeled "Orders" opens the Browser utility listing ALL of the customer's orders currently in the Visual Ticket order pad. From the Browser utility you can then "Go to" a specific order.

However, since this method requires too many windows to be left open, for smaller monitors (Desktop Area) it is better to use the "Specific Customer" option on the Select menu.

The Search Engine lets you select the Customer, and then the Browser lists ALL the orders for that specific customer (that are currently present in the Visual Ticket Order Pad).

Which would include ALL Archived, Processed, Current, as well as Future (Standby) orders for that customers listed on the Browser.

## Customer History in Micro Florist

While discussing customer history, it is worth talking about the means to obtain additional reports on Customer History in a whole different format. These reports are probably already in your Report Catalog. Here's a summary of how you can obtain them.

So, if you need more account details, or need to print this information in other formats, you may want to use the following reports in Micro Florist:

- For specific Customer's Transaction History Report, from the Micro Florist Main menu, select the Transactions menu, go to "Customer Transactions". Enter the customer's Account_Id (or press F1 to search by Last Name, or F2 to search by Company name). Once you have located the customer, press the F8 key. When you have finished printing the 3 different reports, press ESC to exit the Search Engine.

## Special Occasions

To add "Special Occasions" for the customer, click on the "Occasions" button on the Setup form. See Special Occasions in the Marketing Chapter.

But during Order Entry, what's important and can generate additional revenue is to knowing what special occasions are coming up for the customer you are speaking to. To do that, click on the "Occasions" button located on the Customer Profile. Of course you must first enter those occasions. But, entering occasions is NOT the only you can add special occasions. You can have the Micro Florist gig through (it is called "data mining") past transactions and extract those Birthday and Anniversary orders and add them to customer's occasions. For details, see Marketing Chapter.

## Customer Types / Defaults

When adding new customers, the setup parameters (credit limits, statement due dates, customer types, etc.) for each customer are added based on "Customer Defaults".

From the Setup Manager, go to the Business tab, and click on the "Access" button for "Customer Defaults" to setup and modify these Default values.

- The "Make Email Mandatory?" checkbox forces the Operator to visit the Email Address field when saving a customer that has a blank email address. A must, if you want to collect email addresses for eManager Promotions.

The Primary Type Code is the main customer type, as to whether the customer should be added as "Residential" vs. "Business" and so on.

The Secondary CODE 1, CODE 2, and CODE 3 are additional type flags that are assigned to each customer to distinguish between customers with respect to Invoicing, Mail Merging, and Marketing Promotions.

Please note you can use the above Customer Type Codes to FILTER a whole series of Posted Sales Reports (using the Posted Sales Filter utility).

In order to actually change the "Type Definitions", click on the button labeled "Customer Types". To Delete an existing Customer Type, enter BLANK for either the Code or the Description field. To add, simply move the cursor to the bottom of the list, and then enter the additional Customer Type code(s).

Enter the Credit Limit for any customer that is added to the Customer Database.

NOTE Most shops add all orders as "Account Sale" (instead of General Sales).

This allows you to develop and maintain your Mailing List.

Account Sale does not necessarily mean that the Customer has the option to charge his/her account. Entering 0 (zero) for Credit Limit on this form disables the Billing Option for that customer on the Payment form. Then you can always go to Customer Setup and change the Credit Limit, if necessary.

In order for customers to show up in Billing Sessions, make sure the "Bill Customer ?" is checked. Then you may only uncheck this button individually (on Customer Profile Setup) for customers, with whom you have "other Arrangements" with, and do not wish to send him/her statement/invoices.

Select Billing Method #1 if you want to the due date on the statement to be so many days after the date of printing the statement. If so, then specify the number of days after the billing date to be the Due Date.

Select Billing method #2, if you want the due date on the statement to be a fixed day of the month. In this case, you would then select the day of the month, you would like to designate as the statement's due date.

Check "Finance Charge ?" if you want the system to charge Finance Charge on Aged balances of customers. The actual amount of Finance Charge is setup in Billing Module Setup below.

## The "Do Not Use" customer

The system disallows saving of an Account Sale order with a customer that has been designated as "DO NOT USE" (in either the First Name or the Last Name fields). In this case, the system prompts the operator to "Select / Add another Customer" and then automatically activates the Customer Profile form.

You can designate ANY customer account to become a DO NOT USE account by simply changing the First name OR the last name to "DO NOT USE".

The DEFAULT customer account with Account_Id of '0000000000' always comes up first simply because it has all ZEROS (and all zeros always sort on top of other numbers). This is why when you start a new Account Sale, the new order always loads as the default Customer account 0000000000, when you add a new Account Sale.

The factory defaults for this account has "DO NOT USE" as both the first and the last names. To override this feature (so that "DO NOT USE" customer accounts can actually be saved without interruptions, change the first and last names to "DO-NOT-USE" (with dashes in between or any variation of characters).

# Visual Billing Module (VBM)

The Visual Billing Module (VBM) is accessed via the Administration menu.

## Billing Sessions

- The entire Billing Information for a given time period, based on specific "Selection Criteria" is "Built" (referred to as "Billing Session") and remains available on a given for as long as necessary.

Each station maintains it's own "Billing Session" and also remembers it's own "Billing Settings" (including the Last Build Date, and all the different selection criteria used via the checkboxes or the selection criteria, thus allowing you to maintain different "Billing Sessions and Settings" on "different" stations.

With this feature, you can assign one station to maintain your "monthly" Billing Session for printing Statements, while another station maybe assigned to do your "Daily Invoice Printing" for customers who "Pay by Invoice". Yet another station maybe assigned to run "Confirmation Invoices" (invoices sent on purchases already paid by Credit Card or Cash). More on this later.

- Once you build a Billing Session, you can come back to it again and again, to print (and reprint) Statements, Invoices, Mailing Labels, and the Billing Report (Customer Aging Report).

## Selection Criteria

The "Selection Criteria" features of the VBM, is indeed quite powerful. The section in the middle provides some of the standard filtering necessary to narrow down the Build to a subset of customers. The checkboxes on the right, determine the Build Criteria based on billing requirements.

If things don't make sense, always click on the "Reset" button to change the entire Settings back to Factory Defaults for running "standard billing session".

- The "Assigned Division" dropdown allows you to specify (customer) transactions that are stamped with a specific Assigned Division/Location number. This selection applies to companies with "Multiple Locations/Branches". When you must bill customers based on transactions assigned to a specific Division/Location/Branch, and then select the appropriate division from this dropdown control.
- The "Past Due Status" dropdown allows you to include customers based on how current/late the account is. Generally you would choose Past Due Status of 3,4, and 5 only when you want to send additional Statements/Invoices to remind and encourage past due accounts to pay up. You may also want to choose Past Due Status of 2 instead of the default 1, when printing Statements for customers already Invoiced and want to provide more time for "Current Accounts" to pay the Invoices that were already mailed out.

## Customer Type Codes

One of the most important applications for using customer Primary and Secondary Type Codes is for Billing purposes. For specific Billing requirements (such as "Pay by Invoice only", "requires conformation Invoice", "requires monthly statements" is setup via one of the 3 Secondary Type Codes (setup on Customer Profile's Setup button).

- You can decide which code is used for which billing requirement, but once you have setup your customers with proper Types Codes (CODE1, CODE2, and CODE3), then you can select which customer are included in the Build, by selecting corresponding Primary and Secondary Types from the 3 dropdown controls located on the VBM.
- There are 4 "Primary / Secondary Type Code" dropdown controls that allow you to select specific subset of customers for Aging and printing. If you want to deselect a specific Primary/Secondary type code, just leave it blank. Once

you have built your Billing Session, you can match the contents of these dropdown controls with the column labeled "Types" to verify the Selection Criteria. Using this feature, you can Age and print the billing Paperwork for Residential Customers at the beginning of the month, while doing the "Business Accounts" on the 15th of each month, and so on You can assign the Primary /Secondary type codes to customer defaults (in the Setup Manager), specifically for different Billing Criteria.

### Balance Range

- The "Balance Range" fields are obviously one of the most important criteria for billing. You probably want to choose $1 - $999,999 when you are planning to print statements, however you may choose ($999,999) to $999,999 balance range, when printing Invoices that reflect Purchase/Payment Activity of certain subset of customers, that have made purchases using Credit Card, Cash, or Check for method of payment. You may want to choose $5 to $999,999 range if you don't want to send Statements for accounts that have residual balances. Use Power Module #9 to cleanup those Residual Balances.

### Division Filtering

The Divisional Filtering allows you to include the "Sold" (as well as the "Assigned") divisions. The filtering by the "Sold" division, allows you to bill orders "Sold" by a certain Division (Branch) regardless of whether orders were later Assigned to another Division (shop) to be filled.

You can also filter customers by the "Customer's own" Division. The filtering by Customer's Division, means you can filter for all customers added in specific Division (such as Division #1), change the Company Name (or the Pre-Printed form), and then filter for all customers added in Division #2, and so on.

Basically, this option allows each Shop (branch) to Bill their own customers.

### Account_Id Filtering

The "Filter By Account_Id" field bypasses all other Selection Criteria and allows you to do a Build for a specific customer, or to include customers with common Area Code or Prefixes in their Account_Id. So, once you enter any characters into this field, all the other selection controls are disabled. For example, if you enter "425" in this field, all customers that their Account_Id starts with "425" will be included in the next build.

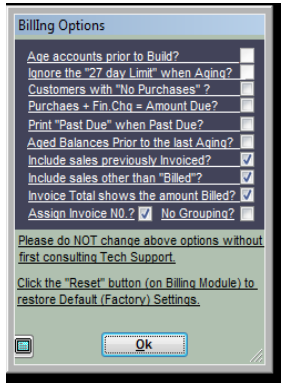
Please note that when you click on the "Search" button (located below the grid with the binocular icon), and the account you searched for is not in the current Billing Session, the Account_Id is automatically inserted into this field so that the Next Build will contain only the desired customer.

- The "View Filter" button allows you to Browse (view) the list of currently selected customers, prior to actually performing the Build. Each time you change any of the Selection Criteria, you may want to click on this button and see the customer list that will be included in the next build.

### Filter Utility

The "Filtering" button selects a specific subset of customers based on the contents of any field in the Customer Database. When you select "Filtering" all other selection controls are bypassed and thus disabled. In this example, customers with their Last Name starting with letter "N, O, P, Q, R, S, T, U, V, W, X, Y, Z) are selected.

You can also perform "and/or" Boolean operations between the contents of the first field and the second field, in order to set a combination filter. Once you have set your filtering criteria, you must click on the "Activate" button to activate the selected Filtering. To disable "Filtering" utility you must access it again, and just click on the "Done" without specifying any filtering.




## Billing Options

- The "Customers with no Purchases" checkbox allows you to include customer that have had no purchases during the Billing Session's specified Time Period. These customers may still have a balance (based on your Balance Range selection) that you still need to mail them statements. Please note that for customers without Purchases during the time period, Invoices are not printed regardless of this selection.
- The "Purchases + Fin. Charge= Amount Due" checkbox applies to printing Statements. Since VBM operate based on the "Balance Forward": accounting principal, Statements show the customer's "Current Balance" as the amount due. However, if you check this checkbox, Statements are printed with the Amount Due being the total Purchases/Payments during the time period plus the Finance Charge. This can really mess up your statements, if not careful.
- The "Print Past Due when Past Due" checkbox refers to whether or not you want to print Due Date (setup in each customer's profile) for a given customer that his/her account is now past due, or print the word "Past Due" instead. Generally, you would select this option, so that the customer (hopefully) pays upon receiving the Statement (instead of waiting for the next due date). Then

you would only change this for those customers who may get offended, by accessing the customer's individual Statement/Invoice Setup (by clicking on the "Setup" button on the grid) for such customer (to remove "Past Due").

- The "Aged Balances Prior to Last Aging" checkbox displays a less critical status of the account with respect to it's Past Due status regarding the printing of Aged Balances. When checked, the 30Day, 60Day, 90Day and 120Day balances are shown prior to the last Aging (as though the last Aging did not occur).
- The "Include Sales Previously Invoiced" refers to Sales that have been assigned an Invoice Number. It is important to note that Invoice Numbers are assigned the very first time you do a Build on a given sale. It has nothing to do with if you actually printed or mailed those invoices. So, if you uncheck this, the second time you do a build for the same period, the session will be Empty. Please note that even if you select "Sales Previously Invoiced", the old Invoice number will remain unchanged.
- The "Include Sales other than Billed" checkbox refers to including sales transactions that were paid using credit card, cash or check as the method of payment.
- The "Invoice total shows the amount Billed" checkbox refers to printing invoices. Select this option, when you want the customer to pay the amount that was billed as the amount due (in case of multiple methods of payment).
- The "Assign Invoice Number" is also an important selection and you want to pay extra attention to the setting of this checkbox, before you run a temporary/casual Billing Sessions. When selected, the Build process will actually change the Sales Database with respect to invoice numbers, and will assign a new Invoice number for each sale that has not yet been invoiced. The assigning of new invoice numbers is a process that is nonreversible.
- The "No Grouping?" checkbox assigns new Invoice numbers to each sale in a group of sales for a given customer. When not checked, all sales grouped together on the same Invoice receive the same Invoice number for purposes of payment and tracking. Check this box when you use one of the "One Sale per Invoice" templates (such as the v_Invce5 template).
- Please note that the "No Grouping" option works ONLY when the Billing Module is assigning new Invoice Numbers (so it does not apply to sales that have already been invoiced).
- The "Dash#" in the Invoice# field (on vInvce_4 or vInvce_5 templates) can then be removed by modifying the User Defined Template and taking out the +'-' from the Invoice# expression.

## Accessing the Customer Profile

You can access any Customer's Profile directly from the Billing module. Here's how; Select a certain Line on the Billing session, and then click the button labeled "Customers". The system accesses the Customer Profile for that customer.

You can also click the "Customers" button, locate a certain customer account and exit. The system will then automatically populate the "Account_Id" field (on the Billing Module's Selection Criteria section), allowing you to do a Build for that specific customer.

The direct access to the Customer Profile, also allows you to "look up" status or Sales/Payment History on a certain customer account, review / modify the Posted Sales / Payments as necessary, then come right back to the Billing Module, and do another Build for that customer.

## Who's is Billed ?

NOTE If a specific customer (or a group of customers for that matter) are not showing up in the Billing Session and you wonder why?, chances are that the "Bill this Customer ?" flag is not set to "Yes" in the customer profile Setup button. Only customers setup to be billed, are included in Billing Sessions.

In order to access the status of all customers who are setup for NO Billing or NO Finance Charge, go to the Billing Module, click the Setup button (on the top right corner of the Billing Module). Now click on the button at bottom labeled "Access".

The utility opens a Browse window where you can view/change the Billing flag and/or the Finance Charge flag for customers who are currently setup with No Billing or No Finance Charge.

Enter T (for True) to activate Billing (or Finance Charge) for each individual customer.

Once you uncheck the "Bill this Customer?" checkbox on Customer Profile Setup form the option to bill the customer in the Payment window will also no longer be available. So, as far as the Payment window is concerned, turning off the "Bill This Customer" checkbox (in Customer profile) acts the same as setting the customer Credit Limit to $0.00. However, customer with $0.00 Credit Limit, are still going to be included in the Billing Session, given they have a Previous balance.

### Build for a specific customer

- Using the Account_Id field located below the Balance Range you can select specific groups of customers based on area code or prefixes of the Account_Id. Of course you can use this field to Build a session ONLY for a specific customer by entering his/her entire Account_Id into this field.
- Using the "Filter" button (next to the Reset button) you can activate the Filter Utility (discussed in details in the Search Engine Chapter) to select a groups of customer based on the contents of any field in the Customer Database.
- Once you have built a "Billing Session", you can easily select/deselect the entire "Billing Session", or individual customers for various printing requirements. Click on the little Flag button located below the Checkbox column to deselect all the selected records (inverts the selections). Then check the one(s) you want to include.

## Customer Aging

- The "Age Accounts Prior to Billing" checkbox is disabled if you have selected "Automatic Aging" (during Month-End Routines). You may check this box only when you are printing Statements and you want to apply Finance Changes to customer accounts. Once you have performed the Aging Routines for a group of customers, those accounts will not be aged if 27 Days has not yet elapsed from the last aging of those accounts. Unless you check the "Ignore the 27 Day Limit When Aging" checkbox. Please exercise extreme caution when you uncheck this particular checkbox. If unchecked, the same account will be aged over and over again. Please note that the Aging operation is not reversible. The only way you can undo an Aging routine, is to recover from last set of backups.

### Aging prior to Build

However if you are printing your Statements later in the month, then you need to setup the Aging to be done when you click the Build button. This will insure that the Aging information (such as the 30 Day, 60 Day, 90 Day and 120 Day Balances) printed on the Statements are Up-To-Date. In this case you have the following AGING options:

- Standard Aging: Age All customer accounts - recommended
- Selective Aging: Age Only selected customers to be Billed.
- Cancel to bypass the Aging process for now.

Usually, you would want to Age ALL Customer Accounts regardless of whether the Customer Balance is Negative, Zero or Positive. So, you would select Option #1 above. This insures that customers who have paid off their entire Balance are properly Aged so that their Aged Balances are reset to zero.

However. if you must AGE only those customers that are currently selected (on the Billing Module) with respect to the Balance (between $1 to $999999) or a certain Division number etc., etc., then you would choose Option #2 above.

## Other Tools

There other buttons / tools on the VBM that can help you along.

- The details of each customer's Billing information with both purchases and payments, as well as the detailed "Line Item" information are all "Dynamically Linked". Click on the "Trans" button located on the grid to open the "Browse" window. Then by moving the cursor from customer to customer or from transaction to transaction, you can see individual customer transaction details, and from each transaction, you can view individual Line Items for each transaction. It is a quick way of showing you which particular transactions have been retrieved to construct the Billing session.
- Use the 2nd Print button to print Labels for envelops.
- Use the 3rd Print button to print Billing Reports to keep as your copy.
- Use the 4th Print button to activate the Report Launcher with Posted Sales / Payment reports (to validate the current Billing Session).

### Fine Tune the output

Once you have build your Billing Session, you can modify individual Statement/Invoice "settings" for each customer (customizing them) prior to printing the Billing paperwork. You may change the name, the amounts, change the Late Messages, remove "Past Due Notice", change the "Sold To/Ship To" information or the Invoice_No, or other Billing Details, if and when necessary.

## Forms and Templates

You no longer need to purchase "Pre Printed" forms, ever! Instead you may want to consider purchasing one of these newer (low cost) "Color Laser Printers", and print very nice looking Statement / Invoice "in color" (on blank paper) right from your friendly VBM.

Currently the VBM is shipped with 8 Statement and Invoice Templates. These templates include different printing formats for statements and invoices, some in color and some in B&W. There are Invoice templates that print only a Single Sale on each Invoice. There are others that print when there is No Balance Due. But you don't have to settle for any of the Factory Setting Templates. You can

make your own, by using fancy fonts and your own shop Logo and especially in your shop colors.

## Using the Billing Module

Before you can start printing Statement/Invoices, you need to setup the Billing Print Job (see Print Job setup in "Local Connections").

Before you do a Build, change the "Starting From" field to reflect the beginning date/time for the Billing Session. The Build Period for billing tells VBM which transactions to include on Invoices and Statements. The Build period refers to the Posting Time Stamp on each Posted Transactions (and not the Order Entry Time Stamp).

After you click on the Build button, you will see the Starting Date field changes to Today (current Date/Time) This so that the VBM will be ready for your Next Build (in a day, or a month from now), so that it starts exactly where you left off.

- Remember to use the "Tool Tip" for each button (to find out what it does) by moving your mouse over it and waiting a second or two for the "Tool Tip" to appear.

After each build the VBM displays the number of customers, the total amount due in statements, as well as the total amount invoiced, for that build.

Now select a Template based on whether you want to print Invoices or Statements then click on the **Print** button. Once you check the Print Preview, you can decide to whether print or exit without printing.

You can use the **Save/Send Toolbar** and create an electronic copy of all Invoices / Statements you are mailing out, for your own records. Having the PDF copy of the original paperwork, allows you to re-print a copy of the original.

### After the BUILD

You can lookup customers, transactions and line items by clicking on the "View Customers/Transactions" button located below the grid (with an "Open Folder" icon). You can move up/down to lookup customers and then click on the transaction window to view the Line items (details) for each transaction. You can also change/modify the name, the company and any other field, you wish.

The "**Flag**" Button located below the "+/-" column, reverses the current "Select" flag for the entire "Billing Session". The same operation is also performed by clicking on the +/- Column Header. For example, you can first deselect a specific customer that you want to be included, you would then click on this button, to reverse selections and deselect all other customers, while selecting the one customer hat you have in mind. Only those customer that are selected, are included in all the Billing Paperwork.

You may use the "**Search**" button (located below the grid with a Binocular icon) to locate a specific customer in the current Billing Session. If the customer you have searched for is not included in the current Billing Session, then the Account_Id is placed in the "Account_Id Filtering" field and the VBM prompts you to whether or not you want to perform a Specific Build for that customer. Please note that if you do select a fresh build for an individual customer, the current Billing Session will be wiped out.

Please note that the Default Sorting of the customers in the Billing Session is the Account_Id column. However, you can easily change that by simply clicking on the **Column Header** of any column that you want to be used for Sorting the contents of the Billing Session. Please note that the active Sort field is used for printing all the Billing paperwork.

You can also "Modify" customers, sale transactions, as well as line item Information during each Session (build), before you print the paperwork. Please note that what you modify here, only affects the information in the current Billing Session. Your changes will be over-written once you do another build.

In order to modify the information, please use the "View Customers and Transactions" button (with the "Open Folder" icon, located next to the "Search" button at the lower left corner of the VBM window). The first time you access the 3 Relational (dynamically linked) windows, only the top window is editable (this is a security feature). To open up all three windows for editing, please press the "Esc" (Escape) button once, close the windows and then reopen them. At this point, all three windows are unlocked and available for editing. Simply locate the customer, click on the appropriate window and change the information as required.

As mentioned above, the VBM is shipped with 8 different Statement/Invoice templates. You can select different templates and check the "Print Preview" screens to determine which template better suits your needs. Once you are in "Print Preview" screen, you can click anywhere on the document to zoom in/out of the specific areas of the document. Click on the **Printer** icon to print all the documents in the Queue, or you may click on the **Exit** (door) button to cancel printing all together.

Even though the existing templates shipped with Visual Ticket are sufficient in most cases, but we strongly recommend that you create your own "User Defined" templates using the existing templates as the base. User Defined templates can be designed with fancier fonts that maybe available on your computer (we can only

use "generic fonts" to insure availability on all computers, but you can do better). You can also include your Shop logo (as Bitmap file with a .BMP extension) to customize the User Defined templates.

You would create your User Defined templates by accessing the Billing Print Job setup in "Local Connections". Please note that User Defined templates start with the letter "U" appearing in front of the template name. Also, a specific User Defined template appears in the dropdown (and is available for selection), only when the Base template is selected first. Please see the section entitled "User Defined Templates/Reports" in Print Job Setup Appendix, for details on creating User Defined version of Billing templates.

By selecting the "**Preprinted Form**" option, the VBM removes "shop name/address" information from invoices/statements, as well as all formatting of columns and headers to allow a clean printout on Pre-Printed forms.

You can also print Mailing Labels for all the customers currently "present" in the Billing Session. The Mailing Label Template uses the same format of Mailing Label stock that is used in the "Report Launcher - Listings".

Clicking on the Print Icon with tool tip "Print Customer Billing / Aging Report" prints a report that shows all Aged Balances as well as the summary of all transactions that are contained in the current "Billing Session".

The "Export" button (on the lower right corner of the Billing form) creates Excel output for the following 3 Billing Session files.

- Bill_Cus.xls - Holds the Customer records that have been selected in the Billing Session
- Bill_Tran.xls - Holds the "Parent" Sales transactions for above customers, linked via the ACC_ID field.
- Bill_Subs.xls - Holds the line-item sub-sales for above transactions, linked via the Trans_No field.

### Confirmation Invoices

To print Confirmation Invoices for customers who have already paid by Credit Card, Cash or Check and want to receive an invoice for their records;

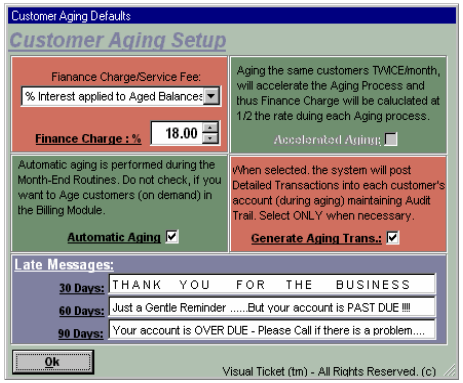
- Assign the Secondary Type Code #3 as discussed above to group them together for this purpose.
- Select v_invce6 template with the following selection criteria;
- Use the following Section Criteria;

## Billing Setup

### Invoice_No, Aging, & Late Messages Setup

- You can access all of the Setup parameters for Customer Account Aging, as well as Late Messages that appear on Statements/Invoices directly from the VBM by clicking on the **Setup** button located on the upper right corner.

You can set the Central Invoice_No Counter to any number between 0 – 9999999999. During each build, the VBM assigns incremental numbers (starting with the value you set for this counter), to sales that have not yet been invoiced.




Please note that Invoice_#'s are assigned to sales when you do the Build, and not when you actually print invoices.

You can either specify a Finance Charge Percentage (to be applied to Aged Customer Balances), or a Fixed Service Charge (that will be applied to any customer that has existing Aged Balance).

- The "Automatic Aging" refers to whether or not you want the Customer Aging to occur during each month's "Month-End Routines", or instead if you want to Age customer accounts prior to doing a Build.
- If you select to Age account during a Build (the Manual mode instead of Automatic), which lets you Age customer accounts right before you print their statements, which insures the most up-to-date information on statements.

**NOTE** Customer Accounts are Aged only when 28 days have elapsed since the previous Aging of that specific account. This insures that the same account is not aged multiple times, during the same month.

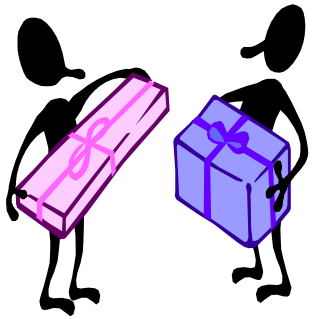
If you disable the "Automatic Aging" selection, then you have the option to perform "Accelerated Aging" which will cut down the "28 Day Protection" mentioned above and allows aging to be done twice per month (applying half of the Finance Charge during each aging routine). You may use this option only if it conforms to your Local/State Laws. You also want to make sure it will not upset your customers!

The option to "Generate Aging Transactions" is an important decision. When you check this option, the system generates 2 transactions per customer, during

each Aging routine. For example, if you have 1000 customers, then VBM would create 2000 transactions per Aging session. That is a lot of transactions that will increase the size of the Transaction (and Sub-Transaction) databases, occupying a lot of disk space. The advantage of course is that each Finance Charge applied to the account is reflected in the details of all Billing/History Reports, thus allowing you to maintain full audit trail.

When this checkbox is not checked, the system generates a single "Aggregate Income transaction", reflecting the Total Finance Charge applied to all Accounts for each Aging session.

The 30 Day, 60 Day, and 90 Day "Late Messages" are self explanatory. Change them based on your policies. You may also use them for Marketing promotions.



## Invoice Manager Utility

The Invoice Manager allows you to create a separate database to manage individual Invoices with respect to "Full" or "Partial" payment for each invoice.

### Operation

As you make a "Payment on Account" you have the option to "allocate" that payment to specific. If you don't need to worry about tracking and matching payments with Invoice numbers, then just click the **Submit** button, and the system will bypass the **Invoice Manager**.

However, if you decided to manage customer's individual Invoices and then allocate the payment you are entering to a specific Invoice, then click the "**Invoice Manager (then Submit)**" button.

The Invoice Manager loads, and prompts you to either

- Build Invoice History for this customer ?
- Update Invoice Records with recent sales / payment ?

Depending on whether it is the first time you are accessing the Invoice Manager for this customer, or the Invoice records have already been generated for the customer, and you just need to update them since the last time you visited the Invoice Manager for this customer.

You can access the Invoice Manager in two distinct modes;

- Payment Allocation mode.
- Invoice Management mode.

### Payment Allocation Mode

The Payment Allocation mode is when you have entered the amount of payment, and are ready to Submit it, but before you do that, you want to also update the Invoice Manager database (by allocating this Payment to a specific Invoice or Invoices, as a Full or Partial payment). In this case you click the "Invoice Manager (and then Submit)" button.

In this mode, the amount of Payment is display on the op of the Invoice Manager, and as you allocate the Payment to individual invoices, the Amount is reduced until it is entirely allocated. This allows you to keep track on how much of the Payment amount is left to be allocated to remaining Invoices.

With all the Unallocated invoices listed right below, it makes it a lot easier to allocate a single payment to Multiple invoices.

- In thia mode, only the "Pending" (not yet Cleared) invoices are displayed by default. Of course, you may select "Cleared" or "All" option at any time.

### Invoice Management Mode

You would access the Invoice Manager in "Invoice Management" mode for "management" purposes (when there is no Payment to be allocated). You can do this from multiple places;

- From the Payment On Account window by clicking the "Invoice Track" button and selecting "Invoice Manager Utility" option.
- From the Payment On Account window by clicking the "Invoice Manager" button after the Payment is already submitted.
- From the Customer History window by clicking the "Invoice Track" button and selecting "Invoice Manager Utility" option.

Now depending on whether or not the customer has existing history of Billed Sales and Payments, the module allows you to sort of Catch Up with all that. So, the first time you access the Invoice Manager (regardless of which mode), the utility lets you go back in time. Here is how;

- In thia mode, ALL invoices are displayed by default. Of course, you may select the "Cleared" or "Pending" option at any time.

## The First Time Session

Once you click to continue the utility extracts ONLY the Sales that have been Billed (otherwise, no Invoice Numbers have been assigned to those sales yet).

Once it has created one record for each Invoice number, it starts looking for existing Payments on those Invoices Numbers., to see if it can find a match for each one. Payments on Account maybe one of the following kinds;

- Payment was In Full with the Invoice number specified.
- Payment was Partial with Invoice number specified.
- Payment was In Full with the Invoice number NOT specified.
- Payment was Partial with Invoice number NOT specified.

For the first couple of cases, the Invoice Manager Utility does it's best to match the Payments to the each Invoice Record, when the Invoice Number has been specified, otherwise, for the bottom two types, please see the special procedure below.

- It is important to note that once you start using the Invoice Manager as part of the "Payment on Account" procedure, you will always have the Invoice Numbers specific on each payment you enter, regardless of whether the customer has written it down or not .
- Another quick way of assigning the corresponding Invoice Number to the Payment (you are about to submit), is to click the "Sales" button (on the upper left corner) first, and select the specific sale from the "Posted Sales Browser" utility. Which will then automatically populate the Invoice_No field for the Payment.

So, as the Payments are assigned to individual Invoices, the ones paid In Full with matching Invoice Numbers (as part of the Payment), are automatically stamped "Cleared".

- Please note that "Cleared" Invoice Records, are filtered out during Payment Allocation sessions. So that only Invoices with Payment still pending are displayed.

### The Notes Field

Based on the type of Payment (whether it is One Time Paid In Full" or Multiple Partial Payments, etc. the "**Notes**" field contains the corresponding description, such as;

- Paid in Full Single
- Partial / Multiple Payment $25.00 + Partial / Multiple Payment $50
- Paid In Full / Multiple, etc.

You will see later on, how you can change the contents of the Notes field (and other values) in the "**Full Access**" mode.

## Capturing Sales ./ Payment History

In case of implementing the Invoice Manager for an existing customer with many month of history and multiple sales and payments, you may use the following tools and method to capture the Invoice Manager records accurately.

### Canceling a Session

You can access the Invoice Manager and have it build the Invoice records multiple times, just to see what needs to be cleaned up, and then just hit the Cancel button, to discard the session results.

This provides you with the opportunity to see which Payments are still unallocated and allocate them.

### Manually Allocating General Payments

You may find that a few Payments were entered without allocating them to a particular Invoice number. Maybe you didn't care at the time, or the Invoice Number was not available, as a result the Payment was entered as a "General Payment".

But is never too late! You can always go back to the Payment window and Modify the Payment by (clicking the "Modify button) in order to assign it to a particular Invoice Number (that was supposed to have been allocated to in the first place).

This will then make it a lot easier for the Invoice Manger to automatically allocate those Payments (that now have the Invoice Number) to the Invoice records.

### Automatically Allocating General Payments

Even though you may achieve more accurate results using the "Manually Allocating General Payments" method above, the Invoice Manager has a utility that lets you have the Invoice Manager come up with it's Best Guess to allocate these General (unallocated) Payments. For details, please see the "Full Access" mode below.

## Subsequent Sessions

Once the "First Time" session is ran and the results have been saved, any subsequent access to the Invoice Manager will start with the prompt;

- Update Invoice Records with recent sales / payment ?

Which is exactly what you want the Invoice Manger to do by checking all the Billed Sales since the last session, and bringing them in, and then also look for any Payment for those Invoices, since the previous session.

However, most of the time you will be accessing the Invoice Manager in the "**Payment Allocation**" mode (from the "Payment on Account" window), which means as the new Billed Sales (new Invoice Numbers) are brought in, you will be allocating the Payment to them, right there and then,

So, once the Sales / Payment History is taken care of (for long term customers), the routine Invoice Manager sessions are pretty straight forward and simple.

### Clearing Allocated Invoices

Once a certain Invoice number is Paid off, you may click the "**Cleared**" checkbox to have those Invoice Numbers be filtered out during future "Payment Allocation" sessions.

## Full Access Mode

For day to day operations, the default Limited Access mode is sufficient for Allocating payments, and /or Viewing (or Printing / emailing) the status of customer's Invoices.

However, if you require full access to modify the Invoice records in the Invoice Manager, then the "Full Access" mode provides many tools to basically do whatever you need to do.

To enter the Full Access mode, check the "Full Access" checkbox and enter the Master Password to unlock the session. Here is a screen shot of the Full Access mode;

### Modify / Delete / Add

As you can see, all the columns turn green (ie; are unlocked), such that you can Modify invoice numbers, amounts, dates, etc.

You can also Delete a certain line (Invoice Numbers) by selecting the line you want to delete and then clicking the "Delete" button.

To add a new Invoice Number, click the "Add" button and type in whatever Invoice number, Sale / Payment Amounts, Notes, Dates, etc.

### The Rebuild menu

The "Re-Build" button activates a menu with following choices;

- Since the beginning of time (all History on record for this customer).
- Since the specific Invoice Number (currently selected).
- By specifying a Time Interval.
- Allocate Payments not assigned to Invoice Numbers (unallocated).

The first 3 choice have to do with rebuilding the Sales / Payments history again.

However, if you need to Rebuild the entire or portion of the Invoice History from scratch, you may want to first "Delete all existing records first (see the "More" menu below).

### The More menu

The "More" button activates a menu with the following options;

- Browse the Invoice file (w/ the current Sort) – Which provides more detailed information about each line.
- Stamp all remaining Invoices "Cleared". Which will mask all the existing records during future sessions, regardless of their Payment status (unless you select "All" from the Status options).
- Delete All invoices (which will trigger "Build from Scratch" during the next session).

## Billing via the eManager

The eManager Functionality is integrated into the Billing Module and as a result The Billing Module gives you the option to send your bills out via email delivery.

At the bottom of the Billing Module the regular "Print Statement / Invoice" button reads "mail" (ie; printing, stuffing them in envelops, and mailing them), as opposed to the other button labeled "email".

In order for this amazing button to work you need the "eManager" and the "Power Module" features available on that station and;

- The eManager must already be setup with your "Email Account" information.
- By using the "Save/Send Toolbar" feature of the Power Modules, you need to create a PDF file from the Invoice / Statement template, in order to verify that PDF conversion of the template actually look good.
- The customer on the other hand needs to have an "EMAIL address" and the "**Billing, Invoice, Receipt via email**" checkbox checked on his/her Customer Profile.

### Operation

A single click on this button

- Generates the Statement or the Invoice for EACH customer in PDF file,
- Generate an email (per your specification) and attaches the file to the email, and
- Transmits the email going thru the entire Billing session.

Now you are ready to click the button and send the bills out via "email delivery". Customers with "successful transmission" are de-selected (taken off the list on the first column of the Billing module).

For customers without email address, or in case the email fails to transmit (due to bad email address), the "**Select**" checkbox for those customers remain selected. Allowing you to either rectify the problem and retry the transmission, or simply "print & mail" the remaining bills.

Starting off, you may have one or two customers that are taken off the list, but in a few months, hopefully mailing bills will be one less chore you need to worry about, and the savings on postage can help improve your bottom line. And since EMAIL provides INSTANT Delivery, it can translate into faster payments thus giving you better Cash Flow position.

Now while you have the customer's attention for opening his/her bill, using the latest HTML technology in the eManager, you can promote a Special Offer or remind him/her to click your website link and do more shopping. This is the reason for the small button next to the "email" button that allows you to edit the "Billing emails w/Attachments" template.

### eMail Template

Visual Ticket users who use the eManager are familiar with the "**Email Template Editor**", where you can customize the email message that is sent out. It is important to note that "**HTML Mode**" checkbox in the eManager also controls whether or not the "Billing email w/Attachment" template is in HTML or in Plain Text.

In order to switch from Plain Text to HTML, once you have checked the "**HTML Mode**" checkbox on the eManager, click on "**Default**" button on the Template Editor, to convert your "Plain Text" template to "HTML template" (or visa versa).

As per discussion in the eManager Chapter, the Default template already has the link to your website (as setup in Session Defaults), and unless you need to jazz up the outgoing email message, the Default template should suffice.

### Keeping copies on-file

The system provides you the option to KEEP a copy of the file attachment in the C:\SMS\OUTPUT folder (on that station). Keeping a copy of the bill comes handy when you need to confirm that the bill was indeed sent, and in case the customer needs another copy, you can always attach it to another email.

However, doing so, week after week, and month after month, one file per customer, pretty soon the folder will get pretty crowded. In which case you should consider to clean up the OUTPUT folder from time to time, deleting or moving old files to another folder.

You can take advantage of this powerful technology to reduce your Postage expenses and at the same time, have a perfect excuse to keep customer's email on file (remember you can make obtaining the "email address" mandatory in Customer Defaults accessed from the Setup Manager) .

So you can continue to be in touch and keep him/her as your "House Account" customer with more personalized service.

# Other Customer Specific Modules

## Power Module #2

Some of the Power Modules play an important role in helping you better manage your In-House Accounts. One of those Power Modules is PM #2.

### All the items purchased by this Customer

If you ever wonder which items were purchased by a certain customer, this is the module you need. To be more precise, "Which Items did this Customer buy during a given Time Period?"

This power module allows you to search/select a Customer, specify a Time Interval, then the module extracts all the Items (with Qty, Price and Cost) the customer has purchased during the specified Timer Period and groups them together and provides the Totals for each item..

Entering Blank for the Account_Id extracts all items purchased (during the specified Time Period) in General Sales. Please note that item sales figures do not include discounts, sales tax, GST, and exchange rates, but do include delivery and service charges.

- When gathering the list for "Who bought this item?", the Power Module #2 allows you to also save all customer Emails into Windows Clipboard (requires the "eManager" feature on that station) .

The email addresses are separated by a "comma" followed by a "space" which is perfect for sending a "Group Emails" to those customers directly from Outlook or Eudora.

To paste the email addresses into Outlook (for sending Group Emails) click to add a new email, place your cursor in front of the "send to:" field and then press Ctrl+V (to paste).

## Power Modules:9 &10

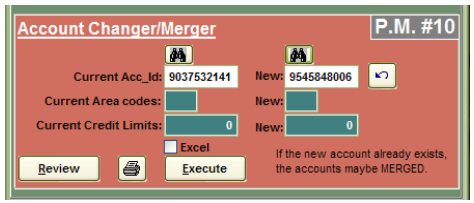
Power modules # 9 and # 10 are used for "cleaning up customer accounts". Power Module #9 (Balance Adjustor) allows you to clean up (get rid of) residual (fractional) balances, while Power Module #10 (The Account Changer / Merger) allows you to change / merge Account_Ids or change Credit Limits (individually or for a group of customers).

We already covered Power Module #9 (Balance Adjustor) earlier in this chapter.

### Account Changer / Merger (PM #10)

The Power module # 10 (The Account Changer / Merger) performs 3 main functions. You would use one function at a time.

- Change/Merge Account_Ids:. If the New (destination) Account_Id is not already present, then the old Account_Id of the account is Changed to the new Account in all Micro Florist (as well as Visual Ticket databases), with all the historical data transferring into the new Account_Id.




- However, if the New (or the destination) Account_Id is already present in the system (meaning the customer has multiple accounts), then the PM asks for your permission to Merge all the related records from the Old Account into the New account. In the print out, such records will have "Merge" for "Status".
- Group Change/Merge of Account_Ids. From time to time, Area Codes change and with it, all the Account_Ids in your system can become obsolete in a single day!. But, not with this Power Module working for you. All you have to do is to enter the old and the new Area Codes, click on Preview button and the system is ready to make the huge changes with a single click on the "Execute" button.
- Again, if the New (destination) Account_Id already exists, the module asks for your permission to Merge the two accounts together by deleting the old Account_Id and transferring all the references to the new Account_Id.
- Change Credit Limits: Change a specific Credit Limit for a group of customer. Simply, enter the amount of Credit Limit you want to lower, (or raise which ever the case maybe), and click on Preview button to see the affected accounts.

When use each one of the above functions, the other fields are disabled. To enable all 3 options again, click on the Reset button.

Similar to PM #9 above, when clicking on the Preview button, and the Browse window lists all the pending changes, you can delete the rows that you don't wish to "Change / Merge" just yet, by pressing Ctrl+T (which places a little "Deleted" marker, at the beginning of the row).

You can print a Report of all the pending changes, by clicking on the button with the Printer icon. Once you have all the adjustments, just the way you want them, click on the "Execute" button.

The Execute button prompts you for the Master Password (to insure against access by unauthorized personnel). At this point the module gets busy and performs all the intended Changes (or Merges) as specified. You can print the report one more time, after the fast, showing the final results, to keep for your records.

To make sure you have all the reports you need when cleaning up customer accounts, the button with "Printer" icon on the upper right corner of the Power Module #9, activates the Report Launcher allowing you to see all the available reports.

## Voiding Finance Charges

The Posted Payments form which is available

- for "All Customers" thru the File menu's "Posted Transactions" selection, and
- for "Individual Customers" thru the History button form the Customer's Profile,

also list "Finance Charges" for individual customers and allow you to DELETE Finance Charges individually (or in Rapid Succession, if you check the No Confirmation" checkbox).

Please note in order to VOID (or delete) individual Finance Charge Transactions, you must have enabled the "Generate Finance Charge Transactions" in the "Setup" button of the Billing Module before Aging Process was performed.

# Chapter 9

**Recommended read for:**

1) System Manager
2) Manager

## Inventory

In this chapter we present the means of adding, and managing Inventory Items. The Inventory file actually resides in the Posted (long term Micro Florist) Database. So, even though you have direct access to the Inventory Database from within the Order Pad, but when you add a new Inventory Item, the item is added to the Posted Database.
However, please keep in mind that the "Quantity On Hand" (Qty_On_Hand) figures for Inventory Items are not reduced until later, when the Process Agent posts the sale. So, don't be surprised that when you sell an item, the Qty_On_Hand remains the same after you have saved the order.
There is another means for keeping count on items in real time, as they are sold, which we refer to as the "Global Item Counter".
As a result you have two different means of keeping count and to compare against one another. One, giving you the Real Time Work-In-Progress perspective, and the other the "Signed, Sealed and Delivered" aspect for a more long term perspective.

### Inventory Profile

Inventory Profile is accessed from the Administration menu and allows you to add, modify and delete customers. You can also use the Inventory Profile to print Barcode labels, set Counter quantities and setup COGS (Cost of Good Sold) percentages.

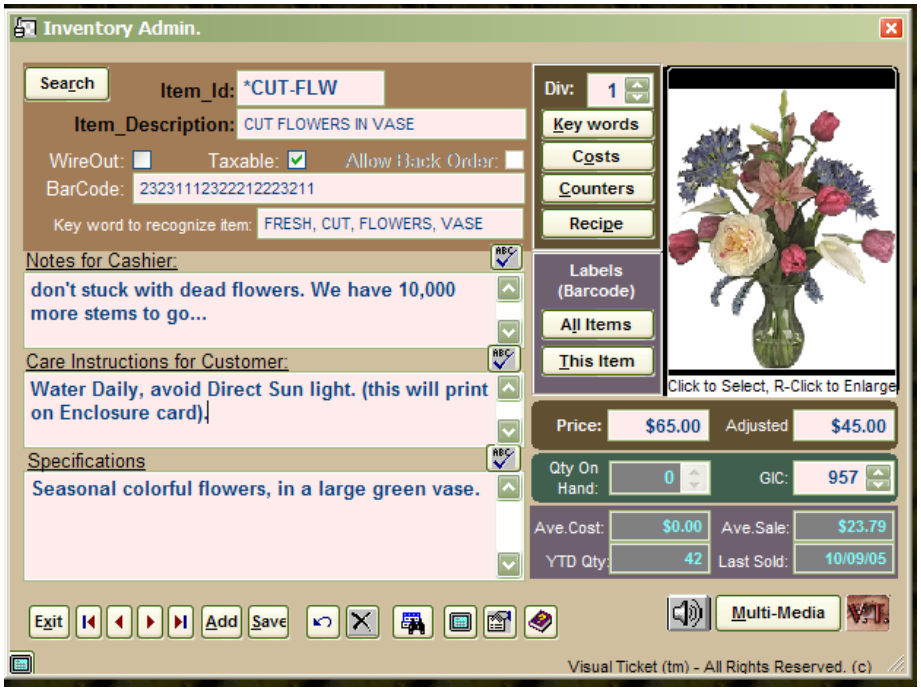
Direct access to the Inventory database is provided so you can add, modify, or delete Inventory items directly from the VT's main menu.

Visual Ticket supports 3 different categories of Inventory items.

#### Standard Inventory Items

The Item_Id of these items do not start with an "*" (asterisk) indicating that the item is reduced from inventory when sold. The actual Inventory Reduction occurs when the sales are Processed (posted).

Once you add the items you can click on the "Counters" button and setup their initial Qty_On_Hand figures. Please note that for "*CUT_FLW" item, shown here,




the Qty_On_Hand spinner is disabled, since it's Item_Id starts with an * and thus it is considered a "Non-Inventoried" Item.

#### Service Items

The Item_Id for Service Items must start "*", indicating to the system not to Reduce Inventory upon sale These are items that are hard to keep accurate count of. Such as Balloons, steams of Daisies, or Greens.

#### Wireout Items

These are a sub-category of Service Items, and actually belong to the "Filling Florist" inventory items. In other words, these items are Remote Catalog items and are NOT reduced when sold.

These items become available from selection during order entry on the order pad, only when you select "Wire-Out" as the type of sale.

If you do a lot of wire-out orders and wouldn't mind spending some time to setup your inventory, you may want to consider Wire Service Catalogs for scanning the pictures and entering arrangements description and pricing. This way when the

operators are speaking with customers they can describe the arrangements in detail. You may also be able to obtain the Bitmap files for the items in catalog, directly from the Wire Service (so that you wouldn't have to scan the pictures).

- These pictures are usually copyrighted material, and as such may require publisher permission. Please contact respective Wire Service.

You can of course take pictures of the arrangements your own designer make (using a Digital Camera) and use those for your Standard or Service Inventory items. That way you don't have to worry about copyrights.

Visual Ticket accepts Industry Standard Picture file formats, and you place them into the Server's s:\sms\vft\bitmaps\products Folder.

The S: drive here refers to the Visual Ticket Server workstation (where all the Order Pad data is stored). Once you have the bitmap files available, to assign to each item, simply click on the Picture area, and select the appropriate file for each item.

### Selecting (Searching for) items

When clicking on the Search button to select an item, you are now given the following 3 choices;

- Select from All Inventory
- Select from Local Inventory (only)
- Select from Wire-Out Inventory (only)

Where choices 2 and 3 allow you to view and select among the "Local Only" (includes both Standard and Service items) and "Wire-out Only" inventory items respectively.

### The Barcode Field

The Visual Ticket supports the Universal UPC barcode (the same standard used for items in Grocery stores). When you are setting up each item, if the item has a Barcode, scan it into this field. Also, when your system is configured to read Barcodes, please make sure to enable the "Barcode Interface" in Session Defaults. (under Order Entry tab).

### Keywords

The Visual Ticket has a Smart Item Selection algorithm for incoming orders from the Mercury, Dove, Bloomlink or your website. For example, when a Wire-in order comes in from the Mercury `system, the system scans the description of the order, and matches that against all the keywords of items in the inventory, and then it selects the item that it's keywords best match the order description. You may assign more that one keyword, and separate them with a "," (comma).

The "Catch-All" keyword phrase for automatically selecting an item, when all other Keywords have failed to find a match, is the keyword: "ALL ELSE".

### Sales Tax and GST

To make the item sales tax exempt, uncheck the Taxable checkbox.

To make the items GST exempt, use the @ sign in Item_Id (such as Gift@Cer).

### Cashier Notes / Adjusted Price

The Cashier Notes field is displayed on the "Price Checking" Form, when the Item Price (on the line items grid), receives focus. The Adjusted Price is also displayed on this form. In order for the Price Checking form to popup, make sure "Enable Price Checking" is enabled in Session Defaults (in Setup menu).

The purpose of the Cashier Notes is for communication between the Manager and Operators regarding specific items, especially as it pertains to the Adjusted Price (why it is on sale and how to promote it?).

The Adjusted Price is a temporary Price Change on an item, without actually changing the actual Price in the Inventory database. You would usually use this, when you want to move an item faster under special circumstances. The "Cashier Notes" for the item should explain the particular promotion.

### Item Specifications

You can INSERT each Item's Specifications (or Details) into the Item's Description by clicking on the button labeled "+" (for Appends) in Combined or Prep forms.

## Global Item Counter (GIC)

Global Item Counter allows you to track sold quantities on items in Real Time to prevent "Over Selling" of items Holidays. It is important to remember, the GIC is completely separate from the Quantity On Hand" counter.

The Process Agent reduces the Qty_On_Hand counter during Posting and only on "Standard Inventory" items (and Service items that start with *). In addition to that, "Quantity On Hand" is reduced only when Submitted Orders are actually posted, and do not take into account "Standby" (Future), Un-Submitted orders, orders with Attention, etc..

So, another mechanism for keeping track of item quantities is necessary to help the Manager to track "Sold Quantities" for all items (including Service Items and other mentioned above), regardless of whether orders are due, or are standby. That is what the GIC does. You would enter the target quantity (the available

quantity) in this field. Then the system starts counting down from this number, every time the item is sold in an order in the Order Pad.

You can also "View", "Print" and "Reset" GIC values by going to the Setup Manager, clicking on the "Misc." tab. The Reset button resets the GIC for all Inventory items back to Zero. This is useful when you like to initiate new count for a given Holiday. You can use the "View" button to also enter new starting values for all items in your "local" inventory.

The Counters button located on the Inventory Profile form, also allows you to setup initial GIC values (as well as Qty_On_Hand values).

## Inventory Setup

There is one last thing we need to setup before we are ready to go online. We need to organize and setup the Inventory. Micro Florist System supports 2 categories of Inventory Items. They are

- Standard Inventory Items: Their Item_Id starts with any alphanumeric character except: *, !, and & - These items need to be purchased (using Inventory Purchase Transaction), and system reduces count when they are sold. These items may include gift items, stuffed animals, etc.
- Service Items: Their Item_Id start with an "*" (asterisk), and system does not reduce inventory when these items are sold. These items include stems of flowers, balloons, supplies, etc. - Shops that do not wish to implement an extensive Inventory Control system, use Service Items for all items that are sold.

Before you start modifying existing Inventory items, or adding new items, it is recommended that you define your Item_Id strategy that makes sense for your operations. You can obtain a printed list of items in Micro Florist's Factory Setup by following these instructions:

From the Main menu, select the Financials menu, Select Inventory Reports, Enter "Y" for printing, select "Standard" for filtering criteria, select "All Items", and generate the report. Then study this report and decide if you want to change any of these items.

Develop your Inventory List grouped by the following 3 categories:

- Standard Inventory Items grouped by the first 3 characters of their Item_Id. You also need to include the current count (quantity in hand), and the cost for each item.
- Service Items, grouped by the first 4 characters if their Item_Id (the first character is always an "*").
- Wireout items. These items also start with an "*", but they are not part of your shop's inventory. They are items sold by Filling Florists. MFS requires the default Wireout item: "*WIRE". You may add additional ones, if you deem necessary.

Once you have finished defining your Master Inventory List, use the Visual Ticket to setup item categories #2 and #3. You need to use Micro Florist's Transaction menu to enter items that belong to Category #1.

### Adding Standard Inventory

From Micro Florist's Main menu, select the Transaction menu. Select Account Transaction. Search Engine opens up the Accounts Database. Locate the CAP (Owner's Capital), press Enter to select it. Hit the Enter key twice to accept the Ref No. and date.

From the Scrolling menu, select Inventory Purchase Transaction. The Search Engine open the Inventory Database. Press F5 to add a new item. The system will prompt you for Item Id, Item Description, and other information. Once you have finished adding the item, the Search Engine blinks on the item that was just added.

At this point, press the Enter key to select the item. Enter the quantity on hand. Enter Setup for Transaction Description. Enter the cost per unit. Press enter for freight, and total. Hit Enter again to accept the quantity delivered. The system will then ask you to confirm the item's Average Cost that will be posted into Inventory. Hit the Enter key again.

Now, the system will propose a Price. The proposed price is based on the first character of the Item Id (the Auto Pricing markups are setup in the Division Business setup). You may accept or over-ride the proposed price. You can add up to 99 line item (sub-transactions) on each transaction. We recommend that you do maximum of 7 sub-transactions per transaction. This will make it easier, in case you decided to void one of the sub-transactions (you won't have to void the entire 99 sub-transactions!).

It is also important to note that you can add/modify "Standard" inventory items, directly from the Visual Ticket system, but you would then need to use the Micro Florist Transactions to add / replenish the item quantity.

That's all there is to it folks. Once you have entered all items, print another Inventory Report.

## Adding Service Items

You can use the "Inventory Adjustments" selection on the Micro Florist's Transaction menu, followed by selecting "Add/.Modify Services" type of transaction from the scrolling menu to add/modify Service items, if you want to do this, while you are in Micro Florist.

Since Service items do not need to be purchased (there are no transactions associated with them), you can use the Visual Ticket System to add/modify Service items. Wireout items are also considered Service Items.

To access Inventory Setup while in Visual Ticket, from the main menu, go to the Administration menu, and select "Inventory". Click on the "New" button on the tool bar to add a new item. The Visual Ticket interface for adding/modify items is so straight forward, that saying anymore would be explaining the obvious.

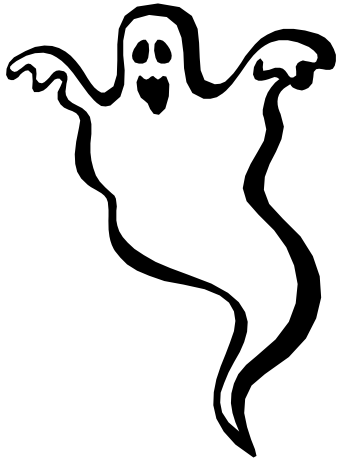
## Pricing Labels

Inventory Item "Pricing Labels" have each item's `Item_Id`, `Price` and `Item Description` printed on `Avery Form 5267` (4 columns 20 rows, 1/2" by 1-1/4"). This is the same Avery form used for Barcode labels.

The new "Pricing labels" are available from:

- The Inventory Profile form (accessed from the Admin menu) as "Price Stickers" printed on Avery form. Using the two buttons located in the "**Label/Barcode**" section of the Inventory Profile form, you can either print the Pricing Labels for `ALL` items or specifically for the "current item" (item displayed on the Inventory form) for the desired quantity.
- The Report Launcher under **Listings**. This is mainly printed on Blank Paper and is used as "Price / Item_Id Reference Sheet" (placed in Sheet Protectors and maybe used around the shop). You can filter the list for any subcategory of items desired and maybe sorted by Item_Id, Item Description and Keywords.

If the station is configured with the `Barcode` feature, the system prompts you to select to print either the "Barcode Labels" or these "Pricing Labels".



# Inventory Recipes

## The Recipe List

This is powerful feature providing you with the following benefits.

**Recipe Items**

You can setup a list of "Recipe Items" for a given (parent) item. You can then over-ride each item's Price, Description and specify the Qty Used for building the parent item.

## Price vs. Qty Comparisons

### Price Comparisons

With the **Qty Comparisons** checkbox Turned Off, the module calculates the Total Price of the Recipe List and compares it against the Price of the parent item itself, to determine the Under / Over for the sale of the item. This feature helps you price your Inventory more accurately to comply with your margin (or mark up) guidelines.

### Qty Comparisons

With the **Qty Comparisons** checkbox Turned On, the module adds a secondary Qty column and allows you to enter Qty2 (or Qty Used) against the original Recipe Qty (or Qty Needed) to determine the Under / Over during Production (making the item) or as an Alternate Recipe scenario.

As you check the **Qty Comparison** checkbox and the second column is added, if there are figures remaining from a previous session, you are then prompted to "**Reset What-If? qty to zero?**" (such that you can discard the previous session's numbers and start fresh).

Once you enter the Qty2 figures, the "Recipe Total" vs. the "Qty2 Total" fields are updated and the Under / Over is calculated based on these two number (thus the original Price of the parent Item is no longer in the formula - here we are strictly comparing the two different Qty scenarios).

If Qty1 and Qty2 columns have different figures, an "**Update**" button appears next to the **Qty Comparisons** checkbox. It allows you to update the Recipe (or the Needed) Qty with the Qty2 (or Used Qty) figures, and resets the Qty2 figures back to Zero and closes (hides) the Qty2 column.

- Please note that when you are considering different Qty figures (Under/Over scenarios), for an Alternate Recipe (or during Production or making of the item), the system DOES NOT generate any Historical records registering such activity, and the figures in the Qty2 column are ignored by the system. (see Inventory Reductions below).
- Please note that when the **Qty Comparisons** mode is Turned On, the "Recipe Report" also adheres to the same calculations rules and allows the Designer to register the Under/Over of his/her production work, by printing a copy of the "Recipe List" with the "Qty Used" vs. "Qty Needed" figures and the associated savings (or loss).

## Printing the Recipe List

You can print the list of "Recipe items" for each parent item directly from the Recipe form by clicking the button with Printer icon.

To obtain a list of Recipes for ALL items, print the listing from the Report Launcher called "Inventory Recipes" (available under "**Listings**").

You may use the Work Ticket template W_TICK7 to PRINT the list of the "Recipe Items" such that your Designer(s) can build each Parent item according to your Recipe. For Paperless operations, your Designers can Lookup the "Recipe List" from the Prep form during Production Tracking. The Recipe List is also available from the Event Worksheet for more accurate pricing, during Event Consultations.

## Inventory Reduction

The system Reduces Inventory (adjusting the Qty_On_Hand Counter) of each Recipe Item in the inventory, in one of the two following modes;

- When the order for the Parent item is "Processed" (in which case the figures in the Qty column Multiplied by the Qty sold, are Reduced).
- When the **Recipe** button is used in "Production Mode" during Production Tracking (see Production Tracking).

For example, if you sell 5 items, and if each one of the parent items uses 2 of the Recipe Items, then the Recipe item is reduced by 10 items, when the parent item is Processed (Posted) by the Processing Agent. You can chose which Recipe items are reduced and which ones are not. For example in the above screenshot,

the Recipe item "GREENS" is not reduced (difficult to maintain count for Greens).

## Implementation

- Only Non-Inventoried items may have a Recipe List of only Standard Inventory Items.

Meaning the Parent Item_Id must begin with an asterisks (*), while the items in the Recipe List must not.

This insures there will be no "Circular Relationship" and this principle also prevents "Double Reductions" of both the Parent and Child items (since Non_Inventoried items are not reduced anyway). In other words, when you sell the parent item, you are actually selling bunch of child items, from which the parent item is made of.

From the Inventory Profile form, click the "Recipe" button. The Recipe form opens. Click on Add button to add the Recipe Items, change the Price, and the Item Description as desired (only if necessary).

Keep track of the total Price of the Recipe List, and then set the (parent) item price, such that there is at least No Loss. Once you close the Recipe form, the Item's Price will transfer over to the Parent Item's Inventory Profile.

If you wish to have the system Reduce Inventory, check the checkbox on the upper right corner. This makes the "Reduce" column visible on the grid, and then you can individually check the Reduce checkbox on each line, as desired.

Click on the "Delete" button located on each line-item, if you need to get rid of an unwanted Recipe item.

### Deciding the contents of the Recipe List

The "Inventory" button located at the bottom of the Recipe form opens the Inventory Profile loaded with the current Recipe Item so that you can Build the Recipe, as you go. If you need a new item to be added to the Inventory (so that it can be used in the Recipe), click this button, add the Recipe Item to the Inventory, come back, and add it to the Recipe.

### Updating the Recipe List

Click on the "Update" button at the bottom of the form to UPDATE each Recipe Item's Price and Description from the latest changes in your Inventory. This operation writes over the changes you had made originally. It is important to keep the Recipe List up-to-date, after a while when item prices and descriptions are changed.

### Work Ticket w/Recipe List

From the Setup menu, go to Local Connections, click on Print Tab, go to Print Job Access and click on Work Ticket. Select W_TICK7 template. This particular Work Ticket lists the entire Recipe List for each item, such that the Designer can build each arrangement according to your guidelines and Recipe specifications and pricing guidelines.

## Recipes in Production Mode

Use the Recipe button located on the Prep form to activate the "Production Mode" during Production Tracking to actually Register the production activity by comparing the "Under/Over" based on the "Qty Needed" vs. the "Qty Used" (instead of calculating it against the Item's Price), and Reduce inventory in real time (again based on the Qty Used), and registering the Under/Over achieved by the Designer during Production (for Employee Review purposes).

Please see "Recipe Production" in the Production Tracking section of the User's Guide.

## Recipes in Event Worksheet

Use the "R" button on the Event Worksheet during Event Consultations to "lookup" (and discuss with the customer) the items for be used for building the pieces of deliverables. You can add/delete/modify the Recipes in Real Time while you are discussing the Event and compare Recipe Costs against Item's Price (to stay within Budget).

This is especially useful when you are using the Event Worksheet. You can build the Recipes for all the "event related" items, as you conduct your first few consultations. Each time, you can improve the Recipe list by making it more and more accurate.

## Material Usage Report

### From the Report Launcher

- The combined "Material Usage" report available from the Report Launcher (see Planning reports) allows you to select a series of orders from the order pad (based on the Time Period, Production Status, etc.), and compile the "Material Usage" (based on Recipe Items used) for each and every line item in those orders, providing you the list of ALL Recipe Items required to BUILD those orders.

### From Production Tracking

The same combined "Material Usage" report is available for an entire order during Production Tracking (Prep Form) sessions. By clicking the "Recipe" button (located in the "Status" area of the Prep form), you'll have the option to either print the "Recipe List" for the Line Item, or print the "Material Usage" for the entire order (based on Recipe Items assigned for each item)..

- This option is presented only when there are more than one line-item in the order. The combined (PRICE X QTY) of all "Recipe Items Used" is then compared to the TOTAL (before tax) of the entire order.

### From Event Worksheet

The same combined "Material Usage" report is also available for a certain event (Wedding, Party, Ceremony, etc..) from the Event Worksheet's "Finish" tab. This button allows you to compile the list of Material Usage (based on all the Recipe Items used) for the current event. The combined (PRICE X QTY) of all Recipe items is then compared to the TOTAL (before tax) of the Event.

### The Cumulative List

You can continue to compile the list of Material Usage (based on the Recipe Items assigned) from one report to specific orders, to certain event projects.

### Resetting the Counts

The ability to "Reset the Counts", each time you compile the list (of the "Material Usage") allows you to keep a "running tab" of the total material required" across orders, events and report. For example, you can;

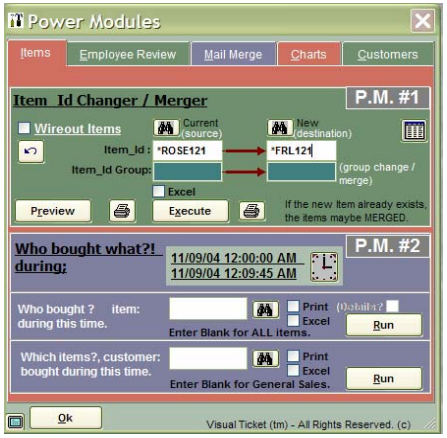
- Run the "Material Usage" report for all of Today's orders, then;
- Run the "Material Usage" report for "Nancy Smith's Wedding", then;
- Run the "Material Usage" report for "Jennifer's Anniversary" then;
- Run the "Material Usage" report for two other orders in the Order Pad (by clicking the Prep form),

and each time select "No" when prompted to "Reset the Counts", and you will get your Cumulative Shopping List for the whole thing !!

# Reorganize the Inventory

## Power Module #1

This Power Module allows you to reorganize the Item_Ids in Inventory after items have already been sold. Now by viewing this Transaction History data you can further fine-tune and define "departments" and "product families" such that the "Item Groupings" (on the Z-Reports) appear in a more logical and useful fashion.




Power Module (PM) #1 performs two main functions (very similar to what PM #9 does for Account_Ids) as follows.

### Change/Merge a Single Item_Id

Use the Search Engine to select the "Source" Item_Id (or if the item is already deleted from Inventory, you can just type in the Item_Id).

Then enter (or use the Search Engine button to select) the new (or the "destination") Item_Id.

If the New (or destination) Item_Id is not in the Inventory, then the old Item_Id is changed to the new Item_Id in the Inventory, as well as in all the Transaction History in both Micro Florist (Posted databases), and all Visual Ticket's Order Pad databases to reference the new Item_Id.

In case the New (or the Destination) Item_Id is already present in the Inventory, then the PM asks for your permission to Merge (or combine) all the related transactions history for the old item into the new item. In the print out, such records have "Merge" for "Status".

If you have deleted items from the Inventory, by using this simple procedure, you can get rid of the warning messages: "Item xxxxx is no longer in Inventory" and merge transaction history of those items into the new items you have already added to Inventory to replace them.

### Change/Merge Group of Item_Ids

This is a super set of the feature #1 above, where you can change a set of Item_Ids (belonging to the same Grouping) simultaneously.

For example, you can change all the *ROSExxx Item_Ids to FRL12xxx (where xxx stands for wild card letters/numbers). Here you have decided to expand the application of Item_Id grouping such that now F stands for Fresh Flower department, R stands for Roses, L for Long Stem, and 12 for Doz, etc. etc. Now all of a sudden in the Z-Report the listing of the first two letters of Inventory Items gives you the breakdown of different departments and Product families, where the old *ROSExxx was doing nothing at all.

You can do these Group Transformations as long as the number of characters you choose to replace, have the same count for the Source as well as for the Destination groupings (you can change *RExxxxx to FGLxxxxx, but can not change *RExxxxx to FGxxxxx).

Again, if the New (destination) Item_Ids already exist, you are prompted to Merge the two items together by deleting the old Item_Id and transferring all the references to it, to the new Item_Id.

### Let's Reorganize ! (the Procedure)

The objective is to change a few Item_Ids to new ones, merge other Item_Ids with existing ones, or to convert existing categories (families) to new categories, over and over, as many times as necessary, such that when you look at the Posted Z-Report the Product Line grouping make more sense, allowing you to manage more precisely; what sells and what doesn't ?, what is in season during which time period?, and especially be able to track your progress with respect to different product lines you carry.

The goal is to have the MAIN product categories (such as Floral, Gift, Labor, etc,) be listed in separate lines, when you select 1 from the "Perform Item Grouping by" prompt.

Then when you select 2 from the dropdown, the Z-Report would list the subcategories among those major categories (such as FA for Floral Arrangements, FC for Floral Cut Flowers, GS for Gift Stuffed Animals, etc.) would appear on their own separate lines, and so forth.

You can change one Item_Id (or one Grouping of Item_Ids) and quickly check the Search Engine button to see how it fits with the other Item_Ids. Then you can click on the "Report Launcher" button (next to the Execute button) and check the Posted Z-Report to see the results.

You should consider doing this after Server Shutdown (to make sure you have good backups just in case), and print the final Inventory Listing (from the Report Launcher) once you are finished. You may want to keep it in a sheet protector for the next couple of days, so that everybody using the system becomes familiar with the new Item_Ids.

Once you have specified the old (source) and the new (destination) Item_Ids, click on the "Preview" button to see exactly which items you have selected and what is going to take place if and when you are ready to Execute the change/merge function.

Once the Preview table looks good, click the Print button to print the pending changes and keep it for your records. Now you are ready to click on the "Execute" button and make the changes.

When using each one of the above two functions, the other fields are disabled to reduce confusion. To enable all the options again, click on the "Reset" button.

Similar to PM #9 (the "Account_Id Changer/Merger"), when you click on the Preview button to Browse the list of all the pending changes, you can delete the rows you don't wish to "Change / Merge" by simply pressing Ctrl+T (which puts a little "deleted" marker which looks like a large dot, at the beginning of the row).

The Execute button prompts you to enter the Master Password (to prevent unauthorized access). At this point the module gets busy and performs all the intended changes (or merges) as specified. You can print the report one more time, after the transformation is completed, showing the final results (and keep for your records). Please note, the module prompts for Master Password only once during each Power Module session.

To provide you with all the tools you need in one place so that you can finish the job of cleaning up your Inventory, you have access to the following modules:

- The two Search Engine buttons allow you to see the Item_Id sorting in Inventory, each time you make a change.
- The Inventory Profile form by clicking on the "Profile" button.
- The Report Launcher by clicking the "Print" button located right next to the "Execute" button, to view/print all available reports with respect to various Item_Id Transaction History.

## Power Module #2

### Who bought Item x ?

If your system is configured to run Power Modules, then you may find Power Module#1 quite useful for finding out "Who bought his Item during a given Time Period?"

This power module allows you to search for an item in the Inventory, specify a Time Interval, and then the module extracts all the customers (as well as the No_Account for General Sales) listing how many of this item was purchased by each customer.

A side benefit of this Power Module is that you can also extract the total Qty Sold and the Revenue generated for a given item in a time period.

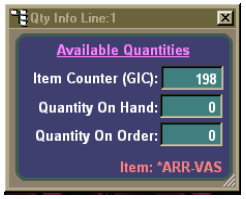
Entering Blank for the Item_Id extracts all the items sold in the specified Time Period. Please be advised that this process can take a while to complete. Please note that item sales figures do not include discounts, sales tax, GST, and exchange rates, but do include delivery and service charges.

## Quantity Check Window

The Quantity Checking and Price Checking forms are two auxiliary Order Pad windows that popup during Order Entry when;

- The corresponding Qty or Price field is Double Clicked, or
- The corresponding (Qty or Price) field receives focus (when setup to do so, in the Session Defaults).
- Pressing SPACEBAR while focus is on the Qty field (on the Order Pad grid, the Combined form, or the Prep form), the "Qty Checking" form is activated.

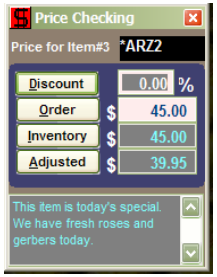
The first method of activating the forms is referred to as "On Demand" Qty or Price Checking, while the second method is referred to as "By Default" (which means it happens every time you access the Qty or Price fields).




- The Quantity Checking form displays the value of the GIC (Global Item Counter) for the selected item, as well as the inventory "Quantity On Hand" for the item in question.
- The Default display of this form is optional, and Session Specific. To enable the "Quantity Check" window as default, please check the "**Enable Quantity Checking**" checkbox in the Sessions Defaults (under Order Entry tab).
- The GIC is a site level parameter (is enabled on all stations at once) and you can turn it off/on by going to "Environment Setup" form in the Setup Manager, and check the "**Enable GIC**" checkbox. Setup GIC initial values click the Counters button located on the Inventory Profile form. To Reset all GIC counts and start from scratch, access the Setup Manager and go to "Misc." tab and click on '**GIC Reset**" button.
- When the Qty Checking form pops up, it may cover part of Line-item grid. Please note that the system will remember the "positioning" of this window. So, you may want to click on the title of this window and drag it to a location that is out of your way and convenient. Once the form is activated, it sends the focus right back to the Quantity field on the grid.

## Price Check Window

Visual Ticket opens the "Price Check" window once the Price field on the line-item grid receives the focus. (or is Double Clicked).




The Price Checking form displays the "Order Price", the "Inventory Price", the Manager's "Adjusted Price", and the Manager's "Item Notes".

- The "Order Price" is the same as the "Inventory Price" the first time you are entering the sale. If you change the price, then this becomes the "Order Price" the next time you access the Price field. For further details on the Inventory Price, the Adjusted Price, and the Item's Notes, see the section on "Inventory" form, discussed later on in the Administration chapter.
- The display of this form is optional, and is Session Specific. To enable the "Price Check" window as Default behavior, check the "**Enable Price Checking**" checkbox in the Sessions Defaults.
- When this form pops up, it may cover part of Line-item grid. Please note that the system will remember the "positioning" of this window. So, you may want to click on the title of this window and drag it to a location that is out of your way.
- Once the form is activated, you can change the "Order Price" if need be, or you can click on any of the other buttons to select either the original Inventory Price, or the Manager's Adjusted Prices. You can also inform the customer of any "special promotions" setup by the Manager (in the Item's Notes field) for that specific item.

### Line Item Discounts

When you press SPACEBAR (or Double Click) the PRICE field (on the Order Pad grid, the Combined form, or the Prep form), the **Price Check** form pops up.

You can enter a "Discount Percentage", hit enter and the system will adjust the price by the Percent Discount you entered.

# Chapter 10

**Recommended read for:**

1) System Manager
2) Manager

## Employees

### Employee Setup

You can access the Employee Setup by selecting Employee from the Administration menu. When you activate the Employee Setup form, you will find it very similar to "Customer Setup" form. As a matter of fact the only differences are;

- Instead of the "Search" button (to select customers), you have a dropdown control to select Employee Staff_Id. Once you select the Staff_Id, the Employee Setup form displays the Employee's Customer Profile.
- To access Employee specific parameters (such as Password, Pay rates, etc.), you need to click on the "Employee Setup" button located below the Address section.

For insuring against un-authorized access to the sensitive Employee Pay and Password information, "Manager Level Access" and Password is required to access the Employee Setup form.

### Mid-session Login

You can change the Operator Login, without having to Exit Visual Ticket.

The importance of this function depends on whether or not you have enabled the "Allow Staff_Id" Changes" checkbox in the Session Defaults. When the "Allow Staff_Id Changes" checkbox is enabled, the integrity of sessions with a fixed Staff_Id is compromised. That is because as the Operator changes the Staff_Id on one order, the new staff_Id becomes the Session's Staff_Id (it is a "sticky" value).

This is due to the fact that when the Staff_Id stamping of orders is left to the Operators, the balancing function becomes less dependable, since an Operator may forget to change the Staff_Id during Order Entry after the previous operator.

Consequently, if the "Allow Staff_Id Changes" checkbox is disabled, this utility becomes the only means for changing the Staff_Id. In this case the Log-in process and changing of "Cash Drawer" responsibility becomes more of an "official" procedure.

Please note that the Staff_Id dropdown box only contains those employees that have been setup in Sessions on the System Monitor for a given Station number (see Adding Sessions in Monitor Agent Appendix).

The Password for login is the same password setup in Employee Setup. However, the Access Levels are specified on the Monitor Agent for each Session and ranges from 1 to 4, the level 4 being that of the System Manager.

Obviously while logging-in, the employee taking over the Session, can "Punch-In" as the same time by clicking the "Punch-In" button that is available on this form. Also, the new employee will be able to view (or reply if necessary) the "log-on Instructions/memo" that appear on his/her log-on screen (setup in the Prompter menu by the Manager). The "Logon Notes/Memo" is Session specific, meaning you can have different Note/Memo for each employee logging on to a certain station.

## Forced Login

This feature allows you to LOCK OUT your current session, such that the NEXT User is forced to login.

This is the NEXT level of security implementation of making sure all Users actually log-out when they leave a station, and log-in when they arrive.

### Close Your Session!!

When the Login Utility is accessed from the Admin menu, the Exit button does not allow the login to be cancelled with the previous login remaining in effect. Instead it allows you to either

- Exit Visual Ticket all together (and start over) or
- You MUST login again.

This means, when you PARK the system on the Login screen the NEXT user is FORCED to login by using his/her password.

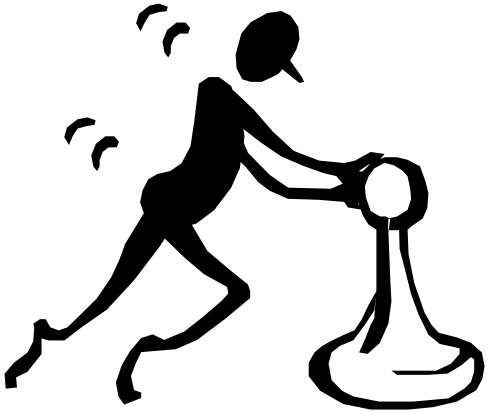
By using the "Forced Login" feature, you no longer have to rely on the employees to always update their Staff_Id for each order (via the Other Info form) .

But, instead it is now the responsibility of the Current User to always CLOSE his/her session BEFORE walking away from the station, by activating the Login screen from the Admin menu (or use the Ctrl-L shortcut).

You can enforce the "Forced Login" procedure by accessing Session Details (Alt-F3), to see who forgot to CLOSE his/her session.

While the Order Pad is open and you need to quickly leave the station, simply press Ctrl-L once to cLose the Order Pad, and press Ctrl-L again to cLose your session, and you're on your way!.

Obviously in order for the "Forced Login" implementation to work, you need to setup a session for each employee on each station (see the System Monitor Agent). Otherwise the employee's Staff_Id will not be listed on the Login Utility's Staff_Id dropdown.



# Punch In / Punch Out

The purpose of this form is to capture and keep track of employees "Hours Worked". You can use the Punch In/Out facility as front end to the Micro Florist's Payroll system, or if you already have a payroll system in operation, then use the Employee Timesheet reports to input the employee hours into that system.

You can use the Save/Send Toolbar and save these time sheet reports in Adobe PDF files so that you can email them to external Payroll Companies to use.

Only Hourly Employees (as setup in Employee Setup form) are eligible for Punch In/Out. Any Hourly Employee can punch in/out regardless of whether or not that employee has been assigned to the given station. In other words, any hourly employee can walk over to any VT station to Punch-In or Punch-out.

The "Message Center" on this form is more of a "Private" communication between the Manager and the employee. Since only the Manager can access the Employee Profile in Employee Setup, and only the Employee will see the notes on his Punch In/Out screen after using his/her password (given nobody else knows his/her password).

The Punch In/Out mechanism is a toggle switch. Once an employee has Punched In, the next time s/he access this form, s/he can only Punch out. Please note that when the Employee is punching out, the Total Hours (for both standard time and Over Time) for his/her last session is calculated and display.

Please note that you can set the date for the closing of the week day for employee time entry. The default is set to Day#2 (Sunday). On this day, week totals are set to zero for Over Time calculations. Once this day is passed, you can not go back and adjust the Hours Worked for the previous period. To change the "Closing Day" of the week, use the Micro Florist Setup menu, go to Tax Tables, and select "Setup Over Time Cycle".

## Modify/Remove (adjust) Punch-Ins

Please locate the "Status" button on the lower right hand corner of the Punch-In Utility. This button allows a Manager (w/Access Level = 4) to view the Punch In/Out status of all Hourly employees in a single window. The Master Password is also required to gain access.

For each employee, you will see;

- "Punched-In at" - shows the Time of employee's last Punch-In.
- "Punched-In on" - shows the Date of the last Punch-In.

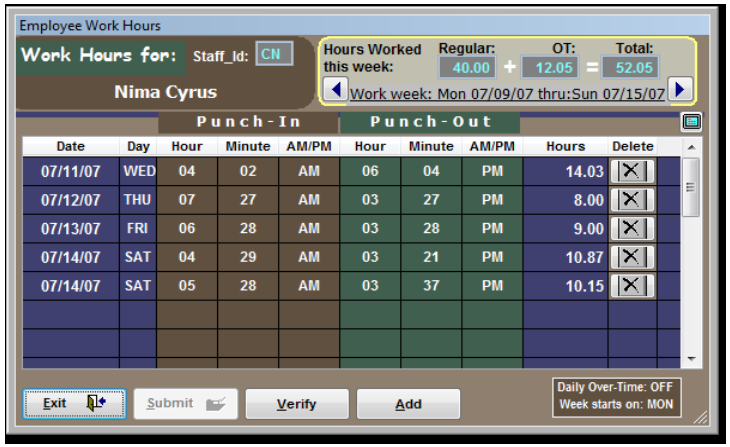
The important point about this window is that if the "Punched-In at" time is Empty it indicates that the employee has not yet Punched-In.

In the Browse window, you can either remove an existing Punch-In time, or you can modify it. If you decide to modify the Punch-In time, you must use the HH:MM:SS for the time format, where HH=Hours in Military Time (00-24) , MM=Minutes (00-59) and SS=Seconds (00-59).

## Add/Modify/Delete Time Entries

From the Punch In/Out Utility, click on "Add / Modify Work Hours" button to access the "Employee Work Hours" utility.

In this module you have access to all the employee's Time Entries (which are series of Punch Ins and Punch Outs) for the "Current" as well as "Previous" weeks.



- You can ADD "Punch In/Punch out" entries for any day of the week (as long as you don't try to enter work hours for future days).
- You can ADJUST the Punch In or Punch out times on existing Time entries.
- You can also DELETE the entire Punch In/Punch pair (transaction) by clicking the "Delete" button for that line.

### Time Overlaps

- The utility does not allow the Punch-out to come before the Punch-in. So, sometimes it is easier to adjust the Punch-out first, then change the Punch In. When adding a new Punch In/Out transaction, the new line is added for Today with the current time (to show up at the button line). You can then change the date/time as needed to reflect a missing Punch In/Out.

### Sorting and Verifying

Once you are finished with your adjustments, modifications, additions and/or deletions, simply click on the "**Verify**" button to sort out the Time entries based on the Work Day + Punch-In time, and also check for "Overlaps" (the module detects and then prompts you to correct overlaps).

The **Verify** buttons also tallies the Employee's Current Week "Regular", "Overtime" and "Total" hours for the week and updates the figures located on the top of the form.

### Previous Weeks

Use the "**Previous** / **Next**" buttons to load the Previous / Next week's hours respectively. You may click the "Previous" button multiple times in order to go back as many Work weeks as necessary.

When you click the **Previous** / **Next** buttons, the form displays the "currently loaded Work Week from mm/dd/year Thru: mm/dd/year" located between the two "**Previous** / **Next**" buttons.

Please note that all time adjustments are made to the "Currently Loaded Work Week" as displayed on the form.

You may use the **Add** button to add additional hours to the "Currently Loaded Work Week", or simply modify the existing hours for that week. The system will then calculate and update the Regular Time and the Over Time for that week, as you Submit those changes.

### Submit the entries

Now that you have Verified your entries, you may wish to click the "**Submit & Exit**" button to apply your changes and exit. Or if you changed your mind, simply click the "**Exit**" button to discard the changes and exit.

Please note you don't need to press the **Verify** button each time, in order to "Submit" your changes, but it is recommended that you do, so that any mistake is caught before you actually submit the Time Entry transactions.

For shops who have not yet considered automating their Payroll process, having this feature which makes cleaning up messy Punch In/Punch outs a snap, and the "Accounting Interface Module Level-2" which fully automates the reporting of the Work Hours to a Payroll Service via QuickBooks, now is a good time to seriously consider it.

## Payroll Settings

In order to change the Payroll Settings, from the Punch In/Out Utility click on the label "**Daily Overtime.....**" (the Master Password is required).

Please note that this label (Status Indicator) is only visible for Access Level = 4 (System Manager access). No point in confusing employees with different policies on Over Time in other states, if/when it doesn't apply.

### Daily Over Time

For states that consider Daily Work Hours beyond 8 hours/day as OVER-TIME, (regardless of the weekly hours being over/under 40 hours) you need to activate "Daily Overtime" once prompted to do so.

After you activate "Daily Overtime", then during Punch In/Out, the system calculates Over-Time based on total Daily hours, as well as total Weekly hours. You will also see the status indicator on the upper right corner of the form displaying: Daily Over-Time: ON/OFF.

### Start of Payroll Week.

Most shops use Monday morning for the start of Payroll week, however if you need to select a different day, specify it when prompted to do so.

## Time Sheet Reports

NOTE Please verify Employee Regular/OT hours on "Employee Time Sheet Reports" to insure the calculations are accurate and are consistent with the Federal and State Labor Laws.

### In Visual Ticket

Once your employees have done few Punch In/Out print the Time Sheet Report to place in your Report Catalog. You can print the Time Sheet Report from ;

- On the Punch In form itself, click on the button with Print icon. If you have selected an employee on the Punch In form, then the Time Sheet will print only for that employee, otherwise it print the Time Sheet of all Employees.
- The Report Launcher. Print Time Sheet for all employees.

Due to sensitive nature of Payroll information, printing Time Sheet Reports require Master Password.

### In Micro Florist

- From the Main menu of Micro Florist, select the "Services" menu. Select "Payroll". Enter a Time Interval.
- The Search Engine is blinking on an Employee Staff_Id. Press the F8 button. Enter :"Yes" for printing.
- Enter the Time Interval you are interested in, from the next menu select "All Employee Time Sheet" report. The system finishes the report, and starts blinking on the Staff_Id again. Press ESC to get back out of Payroll.

# Messaging System

The Message/Mail facility allows you to send messages (or instructions) to other VT stations on the network, or read messages sent to you. If another session sends a message to your session, the message will be read, and displayed every 2 minutes, while the Order Pad is open. The system also displays your mail when you first login.

There are some situations when the Visual Ticket system itself will generate a message always sending it to the first Session on Station 01 (for System Manager). These are usually reminders that certain important Maintenance tasks need to take place. Such as downloading the Florist Master Directory before it actually expires and this interrupting order entry.

### To send a message

Select the "target" session, enter the message. Click on **Save**. To send the message, click on "**Send this message**" button.

### To Receive a message

Once you receive a Message, after you have finished reading it, click on "Mark it as Received" button. This will stamp the message as "Already Received". Better yet, just click on the **Delete** button to get rid of it.

## The Prompter

The Prompter System is a series of windows that open during different stages of Order Entry process to provide the Operator with certain suggestions made to customers, promotions on specials, training instructions, or policies with respect to delivery or price reductions.

In Visual Ticket, Prompters are Session Specific. In other words, session 03KW can be setup to have a different Prompter message for the Prep (Production) window, than session 01SM. You can use this flexibility, to fine tune the Prompter messages with respect to individual employee, or the branch where the session is used.

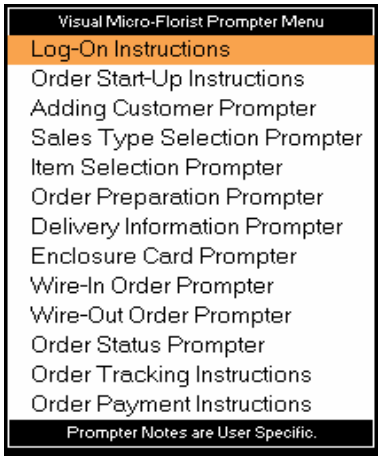
The Prompter messages can be accessed from the System Monitor in real time (by the Manager) for all sessions, and the Prompter messages can be updated to reflect the latest policies, or promotions.

For example, it is 2:00PM, and you just heard the Eastside Truck will not be coming back for another pickup. At this point you will add "No more Deliveries to the Eastside" on the Delivery Window Prompter.

Another example would be that by 3:00PM, you would like to get rid of the rest of your Pink Roses for that day. At this point you will add "Pink Roses are 50% Off" on the Prep Window Prompter. Also, see "Adjusted Price": in the Inventory profile of the item.

The Positions of the Prompter windows are remembered by the Visual System. Depending on the Desktop Area of your monitor, click and drag on the title of the Prompter window, and place it where it can be seen easily, but it is out of your way during Order Entry. Remember, the higher the Desktop Area of the monitor, the more space you will have on the screen for the Prompters and other windows.

## The Prompter Setup




You can use the "Prompter" selection on the Administration menu, to setup Prompter Messages for the current session, or you can use the Prompter buttons on the System Monitor agent to setup Prompters for all sessions centrally.

Prompter Setup is discussed in this section, since Prompters are maintained in Session records (are Session Specific), even though you access the Prompter Menu using the Administration menu.

The fact that Prompters are Session Specific, means you can setup these Prompters differently for John than you would for Debbie.

The reason for this maybe that John is in the Nursery department and Debbie is in the Floral Department, but it could also be that John needs to be reminded (from Training point of view), to enter a certain description for Choice #1, that he keeps forgetting.

Since you can access the Prompter menu for each session, directly from the Monitor Agent, this allows the Manager to send direct Instructions to individual Operators, from a central location.

The Instructions maybe placed on the "Logon Instructions" to be viewed by the employee when s/he first logs on to the Visual Ticket system, or it could be an instruction placed into the Delivery Window Prompter, with respect to change in the Delivery Policy for the Eastside, after 1:00 PM.

It is also important to note that the "Copy' Session button that is available on the Monitor Agent, allows you to copy all Prompters (as well as all other Session Defaults), from one session to all other sessions.

# Employee Performance Evaluations

## Power Module #3

### Employee Sales Performance Measurement

This power module allows you to search and select an Employee, specify a Time Interval, then the module extracts Employee's Sales performance by extracting "Sales Count", "Sales Total $", and "Average Sale $", "Total Time (in Hrs), and Average Time per order, during the specified Timer Period.

Entering Blank for the Staff_Id, extracts Employee Sales Performance for ALL employees during the specified Time Period.

Please note that sales figures do not include Sales Tax and GST.

Employee Performance is also measured by the Total (as well as the Average) Elapsed time per order. The Elapsed Time is measured (in seconds) from the moment you start a new order, until the moment you perform your first save. The Elapsed time is recorded for each order, and the information is passed along to the long term Micro Florist Sales transactions via the Processing Agent.

The Power Module also prints the Totals (of totals) and the Average (of averages) for all Employees.

When the "Details" checkbox is checked, the Power Module displays the Transaction Details of data used in Power Module to calculate the figures. Please note that when the "Print" checkbox is also checked (in addition to "Details" checkbox), a Listing of the Transaction Details is also printed.

## Power Module #4

### Production Performance Measurement

This power module allows you to search and select an Employee, specify a Time Interval, then the module extracts Employee's Production performance by:

| Qty of Arrangements made | Under/Over $ values during Recipe Production. | Total dollars produced / made | Total Hours spent in production | Ave. dollars made per hour of production | Ave. minutes per Arrangement made |
|---|---|---|---|---|---|

When the "Details" checkbox is checked, the Power Module displays the Transaction Details of data used in Power Module to calculate the summarized figures.

When the Details Browse window is open, the Power Module allows you to modify the Made By and the Minutes spent, in order to quickly correct any entries that require adjustments. Please note that entering 0 for Minutes, will recalculate the Minutes for that transaction.

Please note that when the "Print" checkbox is also checked (in addition to "Details" checkbox), a Listing of the Transaction Details is also printed.

## Power Module #5

### Driver Performance Measurement

This Power Module measures each Driver's performance for a giver Time Period based on;

| Qty of Deliveries made | Total Hours spent out on Delivery | Total dollars charged for Delivery Charge | Ave. dollars made per hour of Delivery | Ave. minutes per each Delivery |
|---|---|---|---|---|

- The "Details" checkbox provides the same functionality as above, except it allows you to modify the Driver's name and the Minutes spent on Delivery.
- Punching in the same Start and Finish times, produces zero minutes, this is in turn cancelled out. In other words, if you can finish an arrangement (or make a delivery) in less than 1 minute, may speed up order entry, but it does not help your review!
- Please Note: Since in case of deliveries, usually multiple items are delivered on the same trip, this Power Module allows you to cancel the multiple counting of Delivery Times, by entering Minutes = 1 for those items. Thus, you over-ride the calculated minutes to reduce them to a minimum of "1 minute" for items delivered in the same time interval. Please note that you can not enter 0 for Minutes, since that will force the recalculation of Minutes for that transaction.
- For example, Bob has delivered 5 items on the same trip, between 10:00am and 11:00am. So, we need to check the "Details" checkbox and change the minutes for the last 4 items to 1. Now the Power Module will count the Time On Delivery as 60 + 1 + 1 + 1 + 1 = 64 minutes, instead of the original 60 + 60 + 60 + 60 + 60 = 300 minutes.

## The Data Source for PM 4 and 5

Power Modules 4 & 5 allow you to select between short-term (and sometimes more complete) `Order Pad Database`, vs. the long term `Posted Database` files. As a reminder, Order Pad Databases is geared towards "Current Operations" (and thus are usually purged after 60-90 days), while the Posted Database operates more as a Long Term record container.

As a result, if you want to obtain Employee Performance for say, 3 months ago, chances are those records have been purged from Visual Ticket by now. So in that case, you would want to use `Posted Databases`, as the Data Source.

However, Power Modules # 4 and 5, require that Production and Delivery Tracking be completed (both the `Start_Time` as well as the `Finish_Time`), before the Performance measurements are valid.

This requirement causes a problem with using the Posted Database records as Data Source, when for any reason, the Process Agent (or Server Shutdown) runs in the middle of the day, causing orders to be posted into Posted Database Florist, `before` the Production/Delivery Tracking is completed, thus resulting in incomplete data in Posted Database with respect to Production/Delivery tracking. In order to provide you with maximum flexibility as to which Data Source to use, the Power Module 4 &5 allow you to select either the Order Pad Database (for "up to 60 days ago") reports, vs. the Posted Database (for "60 days or more").

There is also another difference between selecting the Order Pad Database vs. Posted Database as the Data Source. When you select Order Pad Database as the Data Source, the Time Period selected, applies to the "Delivery Date", while in case of the Posted Database the Time Period refers to the "Date of Sale" (as orders become due, the are submitted and processed). Giving you additional flexibility to construct reports, based on your requirements.

It is important to note that these differentiations cause the Performance Reports obtained from each of the two selections, to be somewhat different in the number of records involved.

# Chapter 11

## Wire Services

### Overview

In this section we cover the "Wire Business" side of the Retail Florist. Thus it only applies to a) flower shops and b) flower Shops that do wire-in and wire-out business.

### Wire Service Setup

There are two levels of setting up Wire Services.

#### Wire Service Setup in VT

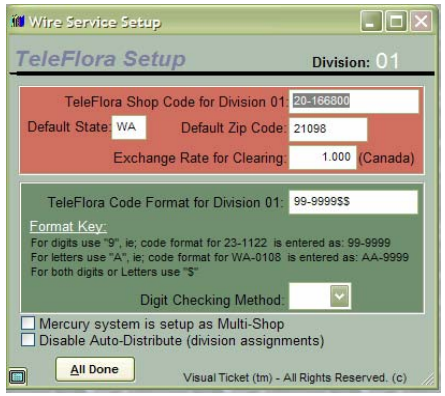
From the Setup Manager click on Access to activate "Wire Service Setup". The Wire Service Setup contains a grid with wire services listed for Shop#1 and some for Shop#2. Here you can add multiple Wire Services for different Divisions (shops) so that each shop can have it's own Shop Code.

- Click on the Delete button for any wire service you do not intend to use.
- Click on the "Setup" button for the first Wire Service.
- Enter your Shop code, state and zip code. Do not change any of the parameters below, since these are the correct default values for each wire service.
- Repeat for all remaining Wire Services. Make sure you do not assign the same wire service twice for the same division (shop).

#### Add a Wire Service

You can also add a "special" wire service (not already included) in the original Factory Setup of Visual Ticket, by simply clicking on the button labeled "Add".

- Once the new line has been added, you click on the Wire Id and actually enter a 3 character Wire Service Id (for example FFX). The Wire Id may not be present in the Dropdown list, but never-the-less you can simply type over and force the entry.
- Press Tab and enter the Name of the Wire Service.
- The new Wire Service must also be added to the Micro Florist Wire Service Setup (see below).




NOTE The 3 character Wire Service Id above, must be the first 3 letters of the Wire Service Name in the Micro Florist setup.

The checkbox labeled "Multi-Shop Mercury Setup?" needs to correctly reflect whether your Mercury has the "Sending Florist Field" in Incoming Order printout.

#### Auto Distribute

This only applies, if you have a Multi-Shop operations.

The Auto-Distribute feature assigns incoming wire orders to the corresponding shop, based on the Wire Service Code that is assigned to that division.

The checkbox labeled "Disable Auto-Distribute" allows you to disable the Auto-Distribute feature of the Mercury, Dove and Bloomlink Agents (in Multi-Shop operations).

If you prefer to "Inspect/Approve" all incoming wire orders at the Main shop, prior to them being printed at the remote location (for Terminal Services networks) or sent out by the VOX Agent, you should check this checkbox.

Once checked, then regardless of what Wire Service code is in the incoming Mercury, Dove or Bloomlink order, the order is always assigned to the "default division" of that station (which at the Main shop, will be Division#1).

#### Auto-Select

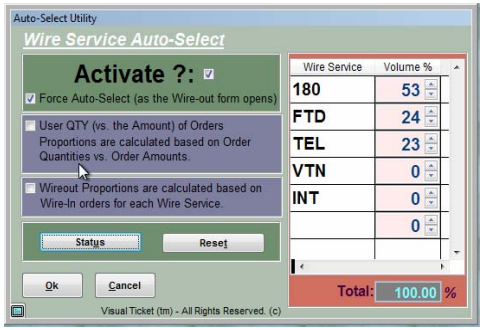
The Auto-Select (of Wire Services) feature job is to recommend which wire service should be used, every time you are in the Wireout form, assigning the Wire Service and the Filling Florist.

The recommendations are based on a set of criteria you specify for each wire service using one of the following two methods:

- Wireout volume sent through a specific wire service will be proportional to the volume of wire-ins received from that wire service (Reciprocation).
- You would specify a "Percent Volume Ratio" for each wire service, and the system will recommend the wire service based on these ratios

to fulfill your goal (to meet a certain volume of transactions for each wire service, in order to qualify for lower membership rates, or sending bonus).

To access the "Auto-Select" setup parameters, click on the button labeled "**Access Auto-Select**" button you see in the Wire Service Setup form. The first checkbox is labeled "**Activate?**". This is the main On/Off switch for this feature.




Once the feature is activated, the "**Auto-Select**" button becomes visible in the Wireout form (next to the Wire Service selection dropdown control).

The second check box determines whether the "Quantity" (vs. the "Dollar Amount") of orders is used for the selection criteria. The default is the "Dollar Amount".

The third checkbox relates to the two methods mentioned above. If you check this checkbox, you are indicating that "Wireout" volume for each wire service should be proportional to its wire-in volume. The system does not require any additional selection criteria.

However, if you uncheck the "**Proportional**" checkbox, you will notice that the form's width increases and it displays a table where you can assign the "Percent Volume" rations for each wire service.

Please note that you can increase (or decrease) the spinners value from 0 to 100% for each wire service, but you need to insure that the total percentage should add up to 100%. The system does monitor this, and will issue a warning if the total does not add up to 100%. To disable a specific wire service, simply assign a value of zero.

The "**Status**" button displays the current status of quantity (or the amount) of orders sent or received via different wire services, and how they stack up with respect to the selection criteria you have specified.

The "**Reset**" button removes the historical (transmission) values for the "Auto-Select" feature, placing zero for these values in the Auto-select table and basically resetting the system so that you can start over.

Obviously this button does not erase any transaction, just the values in the Auto-Select table itself (as they relate only to the Auto-Select feature).

## Auto-Select Force Mode

The Wire Services "Auto-Select" feature is a very useful utility that comes real handy when you have multiple Wire Services and would like to stick with some sort of a "Quota System" for sending your wire-out orders via each one of your secondary Wire Service such that you can qualify to pay the lowest possible Membership fees.

However, the choice of clicking (or not clicking) the "**Auto-Select**" button (on the Wire-Out form) has been left to the Operator. Based on inputs received from Visual Ticket Users out in the field, some Operators forget to use the **Auto-Select** button each and every time they assign the Filling Florist shop, thus the quota figures get screwed up as time goes on.

As a result, there is a "**Force**" checkbox on the Auto-Select Setup page which forces the **Auto-Select** button click each time the Wire-out form is first opened (and there is no Shop yet assigned).

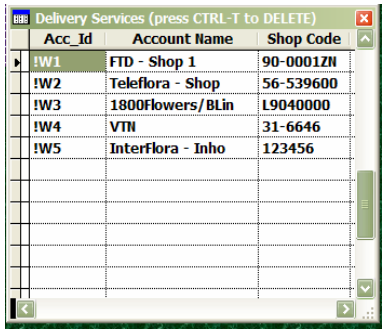
For Access Levels of 3 and 4 (Manager and System Manager) the Operator is given the option to Accept the proposed selection (with YES/NO options).

For employees Access Levels of 1 and 2, the Auto-Select prompt only provides the OK button to "confirm" the selection. In this case the Operator will not be able to change the Auto-Select prompt (although after the selection is made, the Operator can always change the Wire Service afterward).

These features provide for more consistent results and more accurate compliance to your Wire Service Auto-Select "Quota system".

## Wire Service Accounts

In order for the Auto-Reconcile feature to operate properly and the wire service reports to have the correct shop code, the utility automatically matches the Wire Service names to Wire Service Accounts in the Micro Florist. The system allows maximum of 9 Wire Services. You are promoted to add ALL of the remaining Accounts. You should only answer "Yes" if you are adding Wire Service Accounts that are not currently used in Visual Ticket. Otherwise always respond with "No".




| Acc_Id | Account Name | Shop Code |
|---|---|---|
| !W1 | FTD - Shop 1 | 90-0001ZN |
| !W2 | Teleflora - Shop | 56-539600 |
| !W3 | 1800Flowers/BLin | L9040000 |
| !W4 | VTN | 31-6646 |
| !W5 | InterFlora - Inho | 123456 |

### Wire Services Setup in Setup Manager

When new Wire Services are "Added" or existing Wire Services are "Deleted" in Wire Services Setup, the corresponding "Wire Service Accounts" in the Back-End (Micro Florist) databases need to be checked and updated.

The checking of "Back-End Wire Service Accounts" is not automatic every time you click the Ok button to exit the form. Instead there is a check box entitled :

- Update Wire Service Accounts

Only when you check this box the "Back-End" (or Micro Florist) Wire Service Accounts" are updated and checked.

This checkbox is automatically checked once you use the "Add" or the "Delete" buttons. Which forces the "Back-End Wire Service Accounts" to be checked and updated as you click the Ok button to exit the form.

Otherwise, just visiting this form to change certain settings of an existing Wire Services does not trigger the checking and the updating of "Back-End Wire Service Accounts" (and it's associated Browse window).

### Wire Service Accounts in Micro Florist

To setup the Wire Services Accounts directly in Micro Florist, from the Main menu of Micro Florist, go to Setup menu, and select Wire Services Setup. The Search Engine starts blinking on the first Wire Service.

As a reminder of what we have covered about Micro Florist in Appendx-5, while you are in Micro Florist put your mouse aside, and use the Arrow keys and the Enter key for navigation.

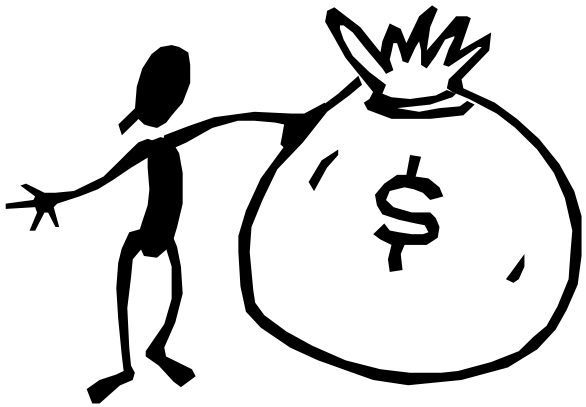
While you see the Blinking "?", press the Home key to get to the top of the file. The system is now blinking on !W1 (FTD ) account. If you use FTD, press F3 to modify it, otherwise press the Down Arrow key to go to the next one..

When you press the F3 key, you notice that the Search Engine stops and you can actually change the contents of each field. Do not change the !W1 account Id assignment. Hit the Enter key couple of times, and enter your shop's FTD code. Hit Enter a few more times, until you finish the last field, and you will notice the Search Engine blinking again.

Hit the down arrow key, to move on to !W2 account. Repeat the above procedure until you have setup all of your Wire Services.

If you need to add a Wire Service, press F5 and repeat the above procedure. Whether you Add or Modify Service in Micro Florist the following rules apply;

- The Wire Service Id you assigned in Visual Ticket must be the first 3 letters of Wire Service Name in Micro Florist.
- For each Wire Service you have setup in Visual Ticket, you need to have a corresponding Wire Service in Micro Florist.



# It is about Reporting

Entering wire-in and wire-out orders have already been covered in the Order Entry Chapter.

Transmitting (or Calling out) of wire-out orders has already been covered in Order Management Chapter under "Wireout Processing Center".

The order transmissions via Mercury, Dove and Bloomlink Agents have already been covered in the Agents Setup Appendix.

Thus the remaining part of this chapter we will present the various means of "Reporting" wire orders and making sure the reporting has been accurate (which covers the Manual and Auto Reconciliation of Wire orders.

Luckily, the bulk of incoming and outgoing Wire Orders are sent automatically via the Mercury, Dove and Bloomlink systems, and as such they are "automatically" reported by the Wire Service (or at least that is what we have come to believe).

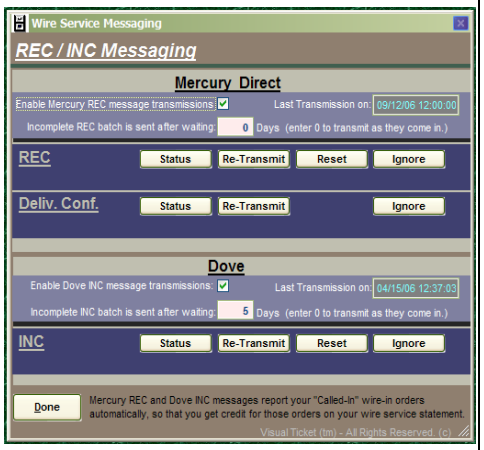
So, the following sections cover the reporting of Called-In orders (by phone) and how to make sure they are accurate.

## Automatic Reporting

### REC / INC Message Transmissions

Mercury and Dove systems each have a special type of "message" (called REC and INC respectively) that you can use to report your Called-In orders.

Visual Ticket takes advantage of this feature and translates your called-in wire-in orders into the format of these special "messages" and sends them out to these systems in batches of 20 orders at a time.




### REC / INC Setup

From the Admin menu, go to Wire Services Management and select on "REC / INC Messages". The two checkboxes on this form handle the automatic reporting of FTD and TEL called-in wire-in orders. The REC and INC messages are automatically transmitted by the Mercury and Dove agents, respectively, as they come in.

Since Teleflora charges $0.75 per INC batch (at the time of this writing), Visual Ticket tries to maximize the number of INC messages in a given batch (a batch is up to 20 orders) to save you money.

As a result, Visual Ticket holds on to INC messages until either

- There are more than 19 of them to be sent, or
- The batch is getting too old, as specified by the number of days you specify on this form.
- You can enter 0 (zero) for the number of days, to bypass the "Batching" arrangement and send them as they come in. You may want to set it to this, to try out a couple REC/INC transmissions to become familiar with the format of the message.

➢ The same concept applies to Mercury's REC messages.

### Schedule INC/REC

In order to tag a specific Wire-in order for REC/INC transmission, start a Wire-in order. Enter the Shop information, and select "None" for Electronic dropdown (meaning it is called-in order).

As soon as you enter the Contact name on the Wire-in form, you will notice the little dropdown located on the lower right corner of the Wire-in form become visible that looks like this:

The default value of this dropdown is "Report it". But you can also select "Reported" or "Ignore".

Once you save the order, and if you have bypassed the batching feature (see above), you should see the corresponding REC/INC message transmitted in Mercury / Dove Agents next cycle and print a copy of the message.

If you go back to the Wire-in order, the dropdown should now read "Reported".

### Managing REC/INC messages

It is highly recommended that you file all REC and INC message print outs generated on the Mercury or Dove systems for reconciliation purposes.

In order to manage the transmission of REC / INC messages and make sure they are transmitting properly, check out the following sections:

- By using the "**Status**" button, review the status of REC (or INC) messages for all qualifying orders in the Order Pad. The Browse window allows you to change the status of REC (or INC) messages, so that individual REC (or INC) messages can be re-transmitted.
- By using the "**Re-Transmit**" button you can change the "Reported" status of all REC (or INC) messages from 2 (Already Reported), to 1 (Report it), within a certain time interval. This will flag all qualifying REC (or INC) messages to be re-transmitted, in case of unsuccessful REC (or INC) transmission attempts by the Mercury 3000, Mercury Direct, or the Dove systems.
- By using the "Ignore" button you can have all the pending Dove INC (or Mercury REC) messages be marked as "To be Ignored" by their respective agent. This is in case you have many pending INC (or REC) messages that have already been reported and you don't want the Dove (or the Mercury) Agent to transmit them again.

For Multi-Location (multi-division) operations, please note that all Dove INC messages (reporting of Called-in Wire-in orders) are reported for the "Sold Division" shop (instead of the Default Division of the station you are on).

## Period Reports

In case you don't have the Mercury or Dove agents for automatically transmission of your Called-In orders to FTD or Teleflora respectively, you can always print the "Wire Service Period" reports and FAX the Wire-in report it to the Wire Service (the old fashion way).

To print the WS Period reports;

- From the Report Launcher, select "**Wire Service Periodic Report**", or
- From Micro Florist Main menu, go to Services menu and select **Wire Services Management**. From the next menu select "**Wire Services Reports**", select "Delivery Date" for listing, select "Yes" for printing, and then enter Yes for "Automatic Batch Printing".

The system automatically prints 3 reports per wire service.

Two wire-in reports, one with Mercury (or Dove) orders for your own records, and the other without. Plus one Wire-out report with Mercury/Dove orders.

You can then fax or mail the wire-in report (without Mercury or Dove orders) to the Wire Service for reporting of "Called-in orders Filled".

# Wire Service Reconcilement

You can reconcile your Wire Service Statement using the Wire Service Reconcilement Utility.

You can access this module from the Admin. menu by selecting "**Wire Services Management**", and then go to "**Reconciliation**". The purpose of this utility is to match up the records in Visual Ticket against the transactions listed on the Wire Service Statement.

The operation of the utility is pretty straight forward.

- You would first specify the Time Period covered by the statement. The utility opens up showing all the Wire-In orders that are "Not Yet Reported" orders for ALL your wire Services for the time period specified.
- You can then select the specific Wire Service, and change Wire-In orders to Wire-Out orders.
- Depending on the specific Wire Service the Statement is either sorted by;
  - "Order#/Contact"
  - "Shop Code", or
  - The "Delivery Date".
- You would then click on the "column header" of the column you want to SORT by, and then simply start hitting the **Spacebar** to Check Off the orders that appear on the statement one by one.

During this process, you can always change the "Time Period" (by clicking on the button with **Clock** icon), change the "Reported Status" or Include / exclude orders transmitted Electronically (via Dove, Mercury, or BloomNet).

At any time, you can also "**Go To**" the order on the "**Posted Order Browser**" in order to look at the HardCopy or to Delete the entire order.

### Modifying the Posted Order

In case, you need to MODIFY certain fields of the Posted order, all you have to do is to click the "**Edit**" button (located next to the "**Print**" button) to UNLOCK the grid so you can modify the information. You can then click the same Edit button to LOCK the grid and go back to the Reconcile mode.

Once you are finished with the session, you would be down to the "discrepancies" for which you can print out the "Wire Service Periodic Report" (by clicking the "Print" button) This would then allow you to follow up with the Wire Service to resolve any remaining discrepancy.

## The Auto-Reconcile

The Auto-Reconcile utility provides a QUICK and EASY way to reconcile your wire service statement, using the "Statement File" provided by FTD & Teleflora (contact the Data Center Dept. – At the time of this writing, they charge about $6 per Statement File).

- The Auto-Reconcile utility is available by selecting **Wire Services Management** from the **Admin** menu.

The Wire-In and Wire-Out activity as shown on the Wire Service statement is matched against the data (actuals) in your Posted Database. Any mismatch (discrepancy) is flagged as such, during the Auto-Reconcile process.

Then the "matched" orders are stamped REPORTED, allowing you to print reports showing all INVALID, DUPLICATE, and/or INCORRECT orders in less than just a few minutes.

For standard Auto-Reconcile operation, select all the Default choices when prompted (simply hit the **Enter** key).

You are prompted to locate and then select the "Statement File" sent to you by the Wire Service.

Once orders are matched up and stamped Reported, you can then use the "Wire Service Reconcile" utility to further process any discrepancy.

In order to proceed, you must make sure the File type is compatible, and your Wire Service code has been setup properly in Wire Services Setup.

Insert the floppy, and select "**Auto-Reconcile**" from the "**Wire Services Management**" menu. Follow the prompts and print the reports.

This is what Auto-Reconcile does;

- Since the Wire Service Statement is based on Delivery dates (and not the Sales date), the Auto-Reconcile module extracts your wire in/out transactions for the same Delivery Date period.
- It tries to match (as best as it can) based on
  - The first 3 letters of Recipient name.
  - The order Amount.
  - The order Date.

Once it find a match it tags the order with "Transmitted and Reported" stamps. It does this until it finishes all the orders on the Statement file. Obviously there will be some orders that have the wrong amount (either purposely or by mistake) or we reported for a different delivery date.

As you look at the report, you can see some of the obvious reasons. You can change the Time Interval slightly to "catch" some more of the orders and stamp those as "Reported" as well. You keep narrowing down the list of "Discrepancies" until you are satisfied.

For those that you need to change the "Reported" stamp manually, see "Manual Reconciliations" below.

## Reconcile in Micro Florist

Instead of having the Auto-Reconcile read your Wire Service Statement from Floppy, you can just go thru the orders and manually check them off in Micro Florist as well.

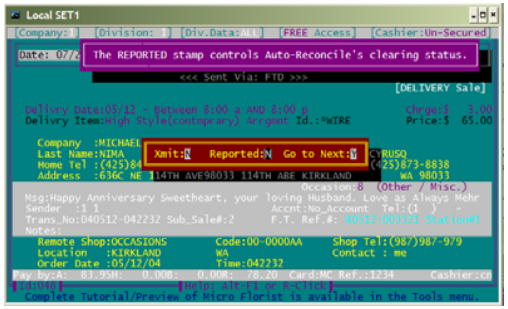
Select "**Wire Service Reconcilement**" from Wire Services menu. Select the Delivery Date range to coincide with the Statement start and end dates. Select the Wire Service !W account based on the listing on top of the screen. Select Wire In/Out by entering I or O. Enter "Y" or "Include Mercury (or Dove) orders". Enter Blank for shop code, enter 2 for Listing by Shop Code (to match the sorting on the Statement). As far as the Order Status stamps, the only one you should be concerned with is the "Reported".

- Enter Blank so that both Reported and Not reported are listed.
- Enter #7 to select Reported orders ONLY.
- Enter #8 to select "Not Yet Reported" orders ONLY.

Based on where you are in the reconcilement process.

The Search Engine starts blinking on the Shop Code. Press the **Home** key to go to the top of the list.

As soon as you see an order that also appears on the statement, press the Tab key, go to the bottom of the menu and select "Change Xmit/Reported" status.




On the Red screen you see here, change Xmit an Reported to "Y" and go to the next record. Since the list is sorted by Shop Code, orders should be matching what is on the statement. Check off the "Reported" orders on the statement that match with the amount of order, and keep going down the list until you stamp all the existing orders on the statement.

## Finishing up

At this point you may have found couple of orders missing, couple of orders with the wrong amounts, and couple still in the Search Engine that are not on the list. Change the date boundaries by couple of days, and try to match up as many orders as you can. Use the Periodic Reports for the same period with #7 or #8 selected for "Status" criteria to zero-in on the orders and resolve any discrepancies.

If you find any orders reported with wrong amounts, initiate corrective action with the wire service.

# BloomNet Xml Interface

This is a 3rd Generation interface architecture to the 1-800Flowers' BloomNet Network that instead of interfacing to the local BloomLink Client, it eliminates all that.and communicates directly with the BloomNet Server at 1-800Flowers Head Quarters.

You no longer have to run the BloomLink Client. No more being interrupted by the "Net Escape" browser popping up, whenever you are trying to get something done on the computer !!

The BloomNet Xml interface constitutes the state-of-the-art in Internet technology using the XML Protocol providing the "TIGHTEST" interface ever between Visual Ticket and a Wire Service Network, performing all of the following functions;

- It receives Wire-in orders.
- It sends Wire-out orders (when you choose "Bloomlink: as the Electronic Transmission option).
- It receives the Filling Florist's Acceptance message to Verify and then Submit the Wire-out order (Wire-out Verifications).
- It sends the Acceptance message on Wire-In orders (to the Sender) once the order is verified to have been saved on disk.
- It sends the "Order On Truck" message on Wire-in orders, when the order is updated in Delivery Tracking.
- It sends the "Delivery Confirmed" message on Wire-in orders, when the order is updated in Delivery Tracking.
- It sends/receives Inquiry message from the either side and puts the order on Attention.
- It sends/receives Response message from the either side and puts the order on Attention.
- It sends/receives Price Change message from Sender to Fulfiller.
- It sends/receives Cancel message from Sender to Fulfiller.
- It sends/receives Cancel Confirmation message from Fulfiller to Sender.
- It sends/receives Cancel Denial message from Fulfiller to Sender.
- It sends/receives Reject message from Fulfiller to Sender.

And most importantly, ALL the admin. messages (such as Inquiry, Response, Price Change, ...) regarding a certain order, is always available on the order itself.

All you have to do is to look for Attention orders, click on Wire button, click on the new "Massaging" button, and all the Message History is there for you to review.

## Printing Options

The BloomNet Xml Agent provides the following PRINTING options;

- Print a copy of all incoming Messages / Orders.
- Print a copy of all outgoing Messages / Orders.
- Print a copy of all Wire-out Verifications and all Wire-In Receipts.
- Print a copy of any Error Message during transmission.

From Wire Service Setup (in Setup Manager), click the Setup button for 180 Wire Service, then click on "BloomNet Xml" button.

Now you can check the corresponding checkboxes for the specific Print options.

## Timed Out Rejects

When a Wire-Out order times out (the "Filling Florist" does not respond in time to the order), BloomNet Interface sends a Reject message to the Sending Florist after a few hours (sometimes a few days).

Once a Reject message is received on a "Transmitted but not yet Verified" wire-out order, the "Verified" flag is set so that the order can be treated as a regular Wire-Out order that actually got rejected by the Filling Florist.

## Handling Rejected orders

When a Wire-out order has been rejected by the Filling shop, you're prompted to "Select another Shop".

However, if you answered No to the above prompt, and while removing the Attention Flag, then the order would remain as "Transmitted / Verified" with no indication that you had not completed the selection of another shop to fill the order.

As a result even if you answer No to "Select another shop" prompt, you are presented with another prompt stating:

- Would you like to at least remove the previous "Transmit / Verify" history to reset the order ?

If you still respond with a No to this prompt, then you are presented yet with another prompt stating:

- You should at least leave the Attention flag On to remember that this order still requires the selection of a different shop to FILL the order".

## It's a Paid Service

The Directory Look up feature also supports the BloomNet Directory (called: 180 short for 1-800Flowers) when you perform your regular Directory downloads.

The BloomNet Xml interface Agent is offered as a Paid Service (pay as you go - with the similar terms as the Mercury Direct Agent or Instant Approval).

The following orders/messages are not counted (offered at No Charge);

- Sending or receiving Wire-In Receipt messages, sending or receiving "Order On Truck" messages, Rejected wire-in orders. or messages on Rejected wire-in orders as well as re-sending of Cancelled Wire-out orders.

There is no charge for sending or receiving Wire-In Receipts or "Order On Truck" messages. There is also no charge for Rejected orders or messages on Rejected orders (as long as Rejected Wire-in orders are deleted). There is also no additional charge for re-sending a Cancelled Wire-out order.

## Auto-Print on BloomNet Website

When accessing the BloomNet website, the Auto-Print checkbox must be unchecked (otherwise the website will conflicts with the BloomNet XML Agent operations).

We have received the following information from BloomNet Operations regarding setting the Default value for the Auto-Print checkbox (so you don't have to remember to uncheck it each time).

Once the shop becomes a BloomNet Member, they receive a packet via snail mail, which will have their login information. Each shop is assigned a standard user and an admin login.

- To disable the "Auto-print" from the website, you need to first login using the admin account. Then once logged in, click on the 'Admin' button, you should see a drop down menu titled 'autoprint', select "off'" and click on the 'Enter' button to save the changes.

When settings have been saved you should see a prompt indicating that, "Administrative preferences set'.

# Chapter 12

**Recommended read for:**

1) System Manager
2) Manager

## Marketing / Customer Service

### Using Sales Reference Number

The **Sales Reference** number is a field that can mean different things to different shops. (as assigned in the Setup Manager's Dropdown setup screens).

The Sale Reference number could indicate geographical location, marketing source, or special customer groupings based on Marketing Campaigns.

You can use the Sales Reference number on the Browser. Where you can use this column to sort / locate orders, based on this User Defined field. You can also use it in the Filter form to filter orders for reports / Excel Output.

### Gift Certificates

In order to manage Gift Certificates, we recommend the following;

- Enter a new inventory item with Item_Id of GIFT_CER with the appropriate Item Description and Price. Uncheck Taxable checkbox so that there will be no Sales Tax.
- Canadian customers should use GIFT@CER as the Item_Id, since items with @ in their Item_Id, will not be charged GST.
- Sell this item when issuing the Gift Certificate.
- When the Gift Certificate is being redeemed, as the last Line Item of the sale, sell the Gift Certificate with Qty of -1 (sort of like a Refund on the Gift Certificate). This will reduce the sale by the amount of the Gift Certificate.
- You can track the quantities that are out standing and view Item's Sales History by using Visual Ticket standard Inventory Tracking/Reporting for this item.

### Marketing Points

Let say you are considering a Point Program Marketing Campaign where a customer accumulates points for each (qualified) visit, and then at the 5th visit, s/he can claim a certain amount of discount (lets say $10 off).

#### Implementation

Add new item with Item_Id of *POINT to your Inventory. Use Item Description of "Points Accumulated", and Price = $0, and Adjusted price of minus $2.00

- When a customer qualifies to obtain the point, sell the *POINT item with Qty of 1 and at ZERO price.
- When customer comes to redeem his/her discount, you go to Power Module #2. Enter his/her Account Id and see how many points (qty sold for item *POINT) s/he has accumulated during the Time Period the offer extended.
- While looking at the Power Module results, you can also see the total amount of Point Discount s/he has received so far (within the same time period of the offer).
- Once you verify that s/he has indeed accumulated 5 quantities of the *POINTS item, you would enter his/her purchase and add the *POINT item with qty of -5 (to clear out the accumulated count) at $2 each , which results in the Extension amount of minus $10". As you see, the discount mechanism is embedded in the procedure itself.

Sales reports such (as the Z-Report) for the item *POINT will show the total Discount given for the entire marketing campaign.

One of the strength of this procedure is that you can ZERO IN on a certain Time Period that the offer was extended, and it ignores all the activity (or points) gathered before or after the offer period. This allows you to change the offer, and still be able to go back to a certain offer in the past, and still be able to redeem the points. And of course, if you ever wanted to see a list of the customers who have participated in the *POINT offer campaign, just use the Power Module #2, which will also show you the "total discount each customer has received", and then import the list into your Excel spreadsheet.

Please note that the Power Modules 1 & 2 operate on "Posted Sales" database, so the counts and totals are updated after the Process Agent runs (Posting the submitted orders for the day).

Do a PILOT program and check it out...

# Personalized Enclosure Cards

You may offer "Personalized Enclosure Card" as a brand new "service" for your customers. With this features, you can go that extra mile and provide true "Personalized" service, that not too many other shops are "able" to offer.

## Implementation

Here's how you can implement Personalized Cards;

- Customer emails a picture (of his/her "new born", a "vacation photo", "silver anniversary", "kids around a camp fire", the Cat, the Dog, etc.), to you're your shop email account in real time, while taking the operator is taking the order. This is really not that hard or expensive to setup now-a-days.
- The Operator locates the picture in the email attachment folder, and selects to previews it.
- The Print Agent prints the Personalized Card using a different Print Job on another printer (your Color printer).
- The Grandma gets the picture of the Boys, when she receives the arrangement. Now, that's "personalized" service!!
- And yes, the trend is more toward operators that can click their way around the computer, as well as color laser printers that are getting less expensive everyday. As Flower shops start marketing fancy / personalized enclosure cards, as part of the "Product/Service" they offer to compete with supermarkets and order takers. It is all about "service". Some VT shops even charge between $15 to $30, for the service. Great extra source of revenue, selling your Information Technology capabilities.
- The e_Card8 is the "Personalized" 3 Panel Vertical template that has the recipient address on the top panel, the customer picture on the middle (central) panel, and the card message is located below the picture on the 3rd panel. You setup the Print Job templates in Local Connections, under Print Jobs (on the station that runs the Print agent). You can also modify the template and move things around, to best suite your requirements. See Print Job setup in Appendix.

Since a subset of your customers may request (or purchase) the "Personalized Enclosure Card" Service, you need a way to specify which template (with or without picture) should be printed (by the Print Agent) for those orders.

Another very important application for selecting "Personalized" Enclosure cards is for Funerals. You can design a special "User Defined Template" for Funerals and then select it based on the specific occasion / event.

To do this, use the dropdown control for selecting different Enclosure Card (print job) Templates (as the templates are setup for divisions 2, 3, 4 ...). See Print Job Setup in Appendix.

### eMail Account Setup

For your eMail setup, you would need a standard POP3 email application such as Microsoft Outlook or Eudora (and not like Hotmail, or Yahoo) where emails are actually checked and downloaded automatically every couple of minutes on the (Office) computer.

If the "email" computer is different than the VT Server, then you would need to map that station's disk, as the X: drive across all VT Stations (so everybody can access the email attachment folder).

This allows the Operator to select (downloaded) File attachments, by simply asking the customer for the File name, without even having to open (or view) the email itself, from ANY Visual Ticket station. Here is the step-by-step procedure;

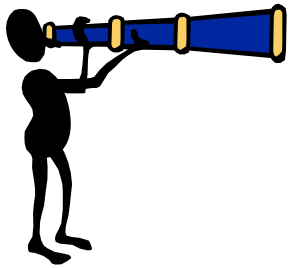
- Customer calls and the operator promotes the Personalized Enclosure Card Service. The Operator gives the customer the shop email address and asks the customer to send an email with the image attached. The email arrives (on the email computer) and the file attachment is automatically downloaded and placed into the Attachments folder..
- The operator clicks on the "Card" button for the line item. Then she clicks on the Enclosure Card picture and points it to the Attachment folder. Please note that the "Attachment" folder is "remembered" by Visual Ticket, so that she won't have to look for it every time. The Operator asks the customer for the file name, and right there and then, she is able to preview the image and verify it with the customer.
- The Operator selects the "e_Card8" template from the "Personalize" dropdown. She then saves and submits the order.
- That's really all there is to it. We recommend that you send a few test emails with pictures attached and have your operators practice with selecting the image file, and specifying the Print Job.
- Please verify that the "Personalized" enclosure cards print properly on the color printer. Otherwise, consider making a User Defined Template out of the e_card8 template, if necessary (to make minor adjustments).

- Call your Print shop to order the blank card stock. Consider sending a sample of the Print out on a blank paper (with maximum text coverage), so that the Blank stock is designed, in such manner where your shop logo or the Care Instructions, do not in anyway collide with the text portions of the card.

### Print Job Setup

Now, in order to setup and include the e_Card8 print job on this particular dropdown, follow the procedure below.

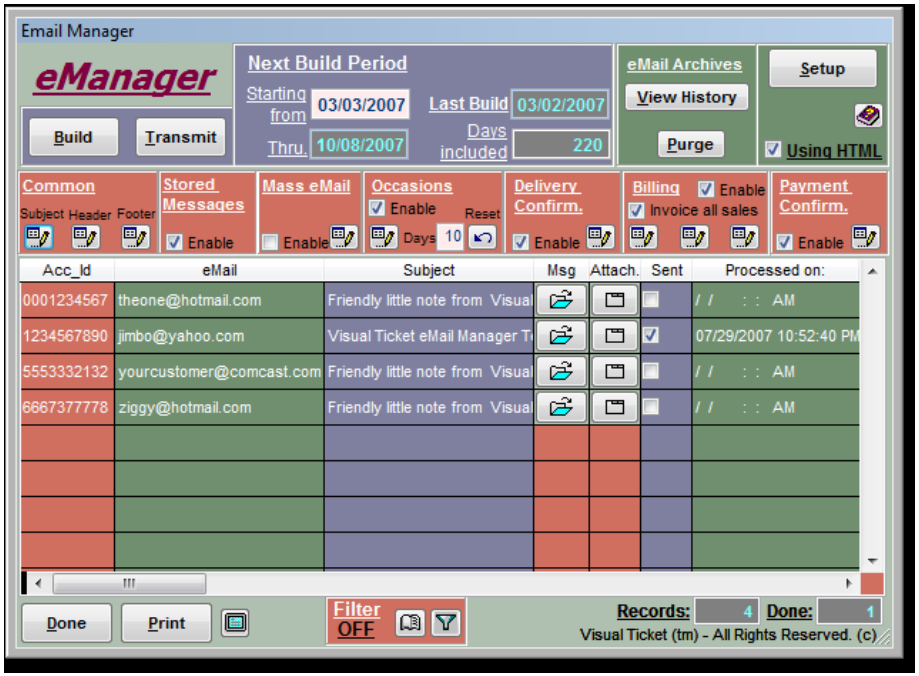
- Go to Local Connections (on the station that runs the Print agent), go to Print Tab, go to Print Job Access. Select Division #2 from the Spinner control, and then click on the Enclosure Card (print job) button. If you have multiple shops (where Division numbers are used), you may select the next (available) Division #. Meaning if you are already using division 1,2,3, and 4. Then select Division 20 (to have enough space for future growth!).
- Select the new e_Card8 template for division #20 and select the Color Laser printer which will be printing the Personalized Enclosure Cards.



## The eManager

The eManager utility provides your shop with state-of-the-art communication capability to stay in touch with your customers on a daily basis. In today's highly competitive market place, the ability to promote your products and services automatically every single day, while reducing cost gives you the edge to stray miles ahead of your competition.

The eManager fully automates the generation of personalized email content for customers that have been setup to receive:




- Mass Promotional emails.
- Delivery Confirmations.
- Occasions Reminder.
- Billing, Invoicing Receipts.
- Payment Received Confirmations.
- Stored Messages (may include Cashier Receipt / Decline Ticket).

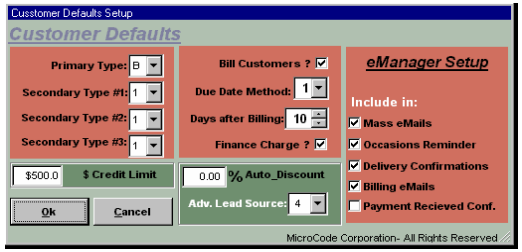
- It is important to note that the eManager merges the above segments into a single email for each customer. Each segment is created based on your own "content design" with key fields merged and substituted from the Order Pad / Posted databases.

Once the email content is generated for each customer, clicking on the "Transmit" button, automatically dials up your Internet account, and sends the scheduled emails.

## eMANAGER SETUP

### Customer Defaults

Before adding new customers, you should setup the defaults values for eManager parameters.

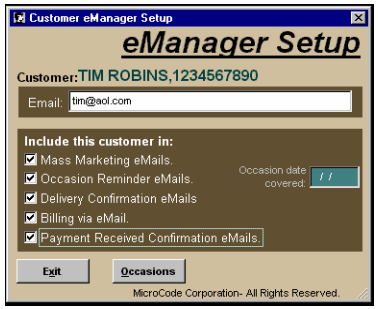



Once you have determined your eManager strategy with respect to which specific eManager services you would be using, you would then go to the Visual Ticket Setup menu, and access the Setup Manager. Click on the business Tab, and access the "Customer Defaults". Check the corresponding services under the eManager Setup.

### Customer Setup

When accessing Customer Profiles (under the Admin. Menu), click on the Setup button and go to "eManager" section (as shown on the right).

Obviously the most important field to fill in for the eManager utility is the "Email Address" of the customer. The eManager totally bypasses any customer that does not have an email address filled in.



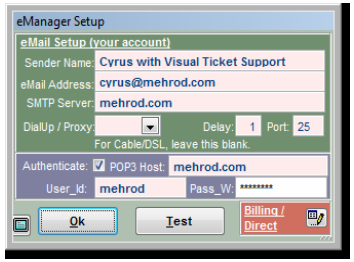

If you are really serious about collecting customer email address, the system helps you out by allowing you to make the eManager Setup form (sown on the right) be Mandatory when saving new customers. See Session Defaults.

The system automatically setups the "default" values as specified in the previous section. This means you would only change these checkbox values, if for some reason, the customer wishes not to receive the specific category of email services you have setup as Default. In other words, the selection criteria used in "building" the email content by the eManager, is solely dependent on the selection of services you have setup in this section. If nobody is setup to receive Delivery Confirmations for example, then regardless of which Email Service you select on the eManager during Build, there will be no qualified customers to receive those emails.

**NOTE** To verify that your customers have been setup properly with their email address and the various eManager Category switches, please see the "Customer eMail Listing" report in the "Listings" section of the Report Launcher.

### Your Email Account

In order for the eManager to login to your email account, the system requires your email account information. Please check your "Email Application Setup" or call your ISP (Internet Service Provider) in order to obtain your Email Server (POP3 Host) name.




If you are using a "Proxy Server" instead of "Dialup", select the "Enter Proxy Server Name" from the dropdown box and then type the Proxy Server name over it. Please note that if a Dialup connection exists on the system, the eManager will use it instead of the Proxy Server. If you are using Cable/DSL Connection, please leave this field blank. But you must first verify that you are indeed connected to the Internet.

If your POP3 email account requires "Authentication", then you also need to enter your POP3 "User_Id", "Password" and the SMTP Server name, and then check the "Authenticate" checkbox.

As the Internet gets clogged up with the implementation of more and more Spam Filters, sometimes your computer's speed for processing the email transmissions exceeds your ISP's "Email Server" ability to handle the traffic. And things only get worse, as more and more emails are queued up for transmission.

Our R&D on the subject indicates that if the eManager slows down the Retry of Failed email transmissions, the probability of success increased dramatically. So setup the Delay value accordingly. On days, when you are experiencing too many

Retry failures, increase the Delay from 0 to 5, 10, 15, 20, 25,…seconds and find the right balance between your computer's speed and your ISP's ability to process the email transmissions. Once you enter a number in the Delay field, it is saved for future eManager sessions.

### Does your ISP block your Mass Emails ?

The eManager allows you to specify the "SMTP Port #" for the connection to your ISP. Please note the Default SMTP Port is always Port# 25. However, certain ISPs (Internet Service Providers) block Mass Email traffic when using this "Default Port # 25". For example "Rogers" (in Canada) requires that "Mass emails" traffic be sent ONLY via the Port # 587.

So, if your Mass Emails are currently being blocked by your ISP, we suggest you call them up and try to convince them of the following facts;

- You are NOT a Spammer. The email addresses used were obtained directly from customers with their consent (were not purchased in bulk "Mailing Lists").
- Emails that you send to companies/individuals are part of the "Service" you provide, as mostly "Status" emails updating your customers with their Order / Payment / Account status.
- Mass "Promotional" emails are sent as part of the service "requested by your customers" for informing them of customer's "Special Occasions" and/or your upcoming promotions / offers. Customer can always trace the emails to you and can request that you remove them from your mailing list.

Then once you have convince them that are not using their servers to send Spam, then you should try to obtain the (somewhat secret) "Port #" that allows "Mass email" traffic to go through the ISP's email servers.

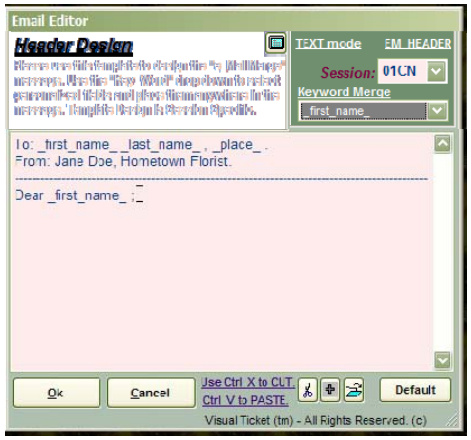
Of course chances are that your ISP may not offer such a "special" port for allowing Mass email traffic. But if you are having problems sending more than a few emails at a time, then you should definitely give this a try.

After you have completed the above setup, click on the "Test" button to send a test email to yourself. Then start your Email Application (Outlook Express) and verify that the email was indeed sent.

## Email Template Editor

The eManager allows you to store different email designs (templates) for each Session (email Content Setup is Session Specific). For example you can have 3 different Mass Email Templates, one for each Session.

As you log in under a different Session, the email content will be compiled based on the Templates setup for that session. The eManager has 10 different email templates as follows:




The Email Template Editor is a simple Memo Field with 100 character wide area. You can use Ctrl-X to "cut" a selection, and Ctrl-V to "paste" it.

You can also use the "Keyword Merge" dropdown control to select available key words for merge with actual Data during the "Build" process. To select a "Keyword" bring the cursor to the location where you want to insert the Keyword, then simply dropdown the control, select the field, and press the Tab key to return to the Template Design area. This will insert the Keyword.

It is important to note that the keywords need to be in the exact format as they are inserted, and may not be edited or changed. You must also account for the actual Length of the Data and other attributes such as dollar signs and so on.

You can change the contents of each Templates as it best suits your operations, but you can always reset the content to its "Factory Setup" by clicking on the "Default" button. The system automatically inserts the Default (Factory Setup) contents, if the message area is empty.

| Template Name | Description | Merged with: |
|---|---|---|
| Subject | Email Subject used for each Email. | Customer Info. |
| Header | 1st section of each Email. This is the "Hello Dear:" section of each email. | Customer Info. |
| Mass Email Content | 2nd section of each Email containing Marketing Promotions or special announcements. | Customer Info. |
| Occasions Reminder | 3rd section of each Email containing the announcement of each up coming Occasion. System will repeat based on Data. | Customer Info Occasions Info. |
| Delivery Confirmations | 4th section of each Email containing a single Delivery Confirmation. System will repeat based on data. | Parent Order + Line Items + Delivery + Production Info. |
| Billing / Invoice Header. | 5th section of each Email containing the Invoice (Receipt) Header. (Sold To, Ship To, Invoice). | Customer Info. + Parent Order + Delivery Info. |
| Billing / Invoice – Line Items. | 6th section of each Email containing Line Item Information. | Line Item + Delivery + Production Info. |
| Billing / Invoice – Footer. | 7th section of each Email containing Invoice Total, Terms, Payment Requirements. | Customer Info. + Parent Order. |
| Payment Received Confirmations. | 8th section of each email containing a single delivery (based on Delivery Tracking). | Customer Info. + Payment Info. |
| Footer | The "Last words" and Signature section at the bottom of Email. | Customer Info. |
| | | |

# eManager Operations

## Interactive eManager Session

The Build Operation retrieves data based on the date specified in the "Build From" field.

Once a build operation is completed, the system automatically updates this "Build From" field with Today's date to get ready for the next time you do a build (so that the time intervals are mutually exclusive and don't overlap).

TO "Repeat" a build, you must reset the "Last Built" date (which will in turn update the "Build From" date). This methodology is used in order to automate consecutive Build operations, running automatically by the Nightly Agent (during Server Shutdown process), so that the same time period is not used unless forced.

The eManager also assumes that emails are built and transmitted at the end of the business day, since it does not allow you to separate data by "time of entry". So, once the "Last Build" is updated, the next build will use the Time Interval that starts from the "following" day.

## Changing "SENT" status globally

Once emails are BUILT on the eManager grid, it is the SENT status that determines whether or not the email should be Transmitted during the "Transmission cycle".

Each time you do a Build the eManager transfers the emails that were successfully "Sent" to "Archive", leaving the emails that failed transmission, remaining on the grid. This causes emails with BAD emails address to pile up in the eManager grid.

As a result, it is necessary that from time to time you correct the pending email address (so that they too can be "Sent") and thus cleaning up the eManager grid.

You can change the SENT status of ALL the emails currently on the eManager grid by "Right Clicking" anywhere on the grid. The following menu pops up (after prompting for the Master Password):

- C a n c e l (Cancels the Global Status Change).
- Mark ALL emails as SENT (no emails will transmit).
- Mark ALL emails as NOT SENT (all emails will transmit).
- Reverse SENT status ("Sent" emails become "Not Sent" and visa-versa).

In short, this feature allows you to globally change the "Sent" status of emails currently in the eManager to help you with your routine Cleanup task.

### File Attachments

After you do a Build in the eManager, you can click on the Attachment button (for any customer) to attach a certain file to be sent to the customer, when you click on the Transmit button.

Once you have specified an Attachment for a certain customer, the Attachment button changes from a "Page" icon to a "Flag" icon, indicating there is indeed an attachment for this customer's email. So you can determine which customers are scheduled to receive the attachment and which one will not.

The eManager also allows you to attach the file to ALL pending emails.

## Stored Messages

The eManager now allows you to store messages for each customer during order entry, or when entering payments (on account), etc. As the operator, you can establish a more "personalized" service by answering customer's questions, suggest new ideas, or simply say "Thank you!" by entering a message in customer's "Stored Messages" field. This feature goes the extra mile to provide the necessary tool for making a more "Personalized Service" possible.

You can access "Stored Messages" for a specific customer, by clicking on the button labeled "Stored Messages" in customer's eManager setup form. Once the window opens, you can add, delete or modify email messages scheduled to be sent to this customer during eManager's next Build.

You can also include the Cashier Receipt as a Stored Message. For customers with email address in their profile, the checkbox "Email It" (next to the Print "Receipt" button) both in the "Payment" as well as in the "Payment on Account" forms becomes visible. Once you check the "Email It" checkbox, instead of printing the Cashier Receipt, the system stores a copy of the Cashier Receipt in the customer's "Stored Message" field and pops up the window, allowing you to add additional lines, if you like.

On the eManager form, the checkbox under "Stored Messages" section allows you to enable the transmission of "Stored Messages". Once checked, any customer that has email address and a Stored Message in his/her profile, will be included in the build.

- Please note that "Stored Messages" appear first in the eMail Construct (before others). Also, once an email has been successfully "sent", the eManager will automatically locate the customer and erase the Stored Message for that customer.
- In case you want to Delete (erase) Stored Messages for all customers, you can go to "Customer Defaults" in the "Business" tab of the Setup Manager, and then execute "Clear all Stored Messages" button.

## Marketing Promotions

The Mass Email Enable checkbox is reset by the system each time a successful build operation is performed. In other words, the system schedules each "Mass Email" for Marketing Promotions for one time only. This prevents the same marketing message to be sent over and over again, to the same customer (which may cause the customer to put your email address in their Junk email setup, blocking future emails to be downloaded to their system)..

## Invoice by Email

The "Invoice All Sales" checkbox in the Billing section of the eManager, allows you to generate emails for all customer with purchases during the Build period, regardless of whether they were paid by Cash, Check, Credit card, or Billed. If you are planning to use the "Invoice all sales" option, the template should be modified to look more like a Sales Receipt (or "Confirmation Invoice"), rather than a "Billing Invoice".

The Invoice Number used in the Invoice Header is of special importance. By inserting this field into the Invoice Header you are telling the system to assign a "new" invoice number to each invoice and update the sale with the new invoice number for purposes of Invoice Tracking.

## Occasion Reminder Email

For Occasions Reminders you can specify the "Number of Days to Cover". For example if you enter 14 in this field, the system will look at "Upcoming Occasions" within the next "14 day" time window.

You don't always need to add customer occasions, in order to send Occasion Reminder messages to your customers. The system makes it easy to generate more revenue. You can always have the system "Learn" special occasions from all the previous tickets for a given customer. This is why it is very important to enter those occasion codes correctly, when entering orders (see Occasions Reminder).

To do this, please go to Micro Florist's Services menu, go to Occasions Reminder and then select "Learn Occasions from Tickets". Obviously you need to have used the system for at least one year (for the anniversary dates of Birthdays, Anniversaries, etc.) to use this feature.

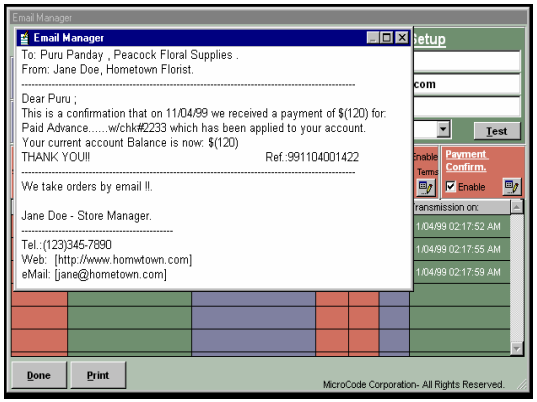
## Doing a Build

Once you have designed your eManager templates, and have a few customers with email addresses filled in and appropriate eManager Services checked, and each customer has few orders in the Order Pad, and few occasions within the next few days, and a payment or two entered, you are ready to test the eManager Utility.

Click on the **Build** button and wait a few seconds. The system will populate the eManager grid with one email per customer which contains all the appropriate eManager sections, as it applies to that individual customer. That is a lot of work.

Once the Build is complete, you can click on the "**Msg**" button for each customer to preview the emails that are scheduled for transmission.

Verify that appropriate sections are present for each customer, and evaluate your template designs, from the customer's point of view.




We also recommend that you perform a "Test Build" for your own account and actually transmit that email to yourself, to insure that the template design in its actual email format is pleasing and tolerable.

In case of an interactive session (as opposed to running during Server Shutdown), before you actually send these emails, this is your chance to alter specific emails, and add your own personalized messages, if necessary.

## Transmit

Now we are ready to click on the "**Transmit**" button to actually send all the emails that have been built. You would notice that the system dials up your Internet Account (if you are on Dialup), and starts sending the emails one at a time.

Emails that have been sent successfully will have their "**Send**" flag checked. For those that had a problem with the email address, this is your chance to find the correct address, update the email address on the grid (you should also fix the original customer email address in customer setup) and retransmit.

After you have fixed obvious problems with the email address that failed the first time around, you may now click the "Transmit" button again, to send ONLY those that were not sent before. You may also, uncheck the "Send" flag, to retransmit the message, if necessary.

### Filtering Customers

The eManager Utility provides you with the ability to Filter customers, prior to a Build process. There are 2 buttons located (next to the **Ok** button) at to the bottom of the eManager utility, that provide you with this functionality. The buttons activate the standard Filter utility that was discussed in the Search Engine Chapter.

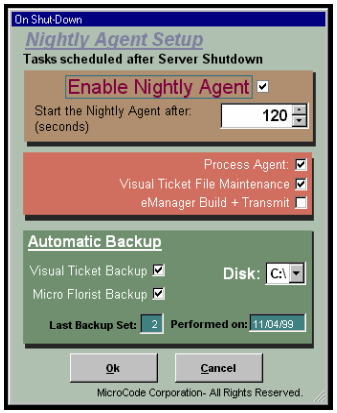
The button with the **Funnel** icon activates the "Filter" utility letting you set specific values for specific customer fields. For example, you can set specific Zip code ranges or select customers in specific State.

The second button (with the **Book** icon) opens a Browse window, allowing you to see the list of customers that have been currently selected for the next Build. There is also the label "**Filter ON/OFF**", indicating the current status of Customer Filtering.

## Automatic eManager Sessions

The eManager running once a day (usually at the end of the day) builds and transmits all intended email functions, regardless of whether or not the VOX Agent feature is present. The difference of having the eManager running via the VOX Agent through out the day increases your level of customer service. As a result, one is not a replacement for the other, instead they work in concert and are complementary, when used together.

### Via the Nightly Agent




After you have fine tuned your eManager setup and operations, you are ready to go into the Automatic Nightly build/transmit sessions.

From the Visual Ticket main menu, go to the "**Agents**" menu and select the "**Agent :Launcher**". Click on the "**Setup**" button of the "**Nightly**" agent. To enable the eManager operations within the Nightly Agent, simply check the appropriate checkbox on this form.

Do a Server Shutdown and verify that the

"eManager" Build and Transmit operations occur after the "Process" agent is finished.

## Via the VOX Agent

Delivery Confirmation emails and Customer Stored Messages (Receipts, Decline Tickets, etc.) maybe transmitted through-out the day, and (almost) in Real Time.

### Applications

Whether the order originated from your Website, or was called in by the customer, once the Driver scans the deliveries into the Delivery Tracking module, the VOX Agent sends the Delivery Confirmation in its next cycle.

Also, if a customer emails (or faxes) an order, and the card is declined, you can email the Decline Ticket to the customer within 10-15 minutes (as a Stored Message). Or you can email the Cashier Receipt as confirmation for the receipt of the order.

### The VOX Express

You need both the eManager and the VOX Agent capabilities on the VT Server to transmit Delivery Confirmation in "Real Time". As a result, for shops that do not have a website and thus do not need the Full Feature VOX Agent to download orders from their website, there is a "Lite" version of the VOX Agent called the VOX Express The VOX Express facilitates the Real Time transmission of Delivery Confirmation emails without the other VOX functionality.

### Implementation

From the File menu, select Virtual Order Transfer (VOX) and check the "eManager Build + Transmit" checkbox. Then from the Agents menu, select Agent Launcher and click on Setup button for VOX Agent to setup Startup Delay and the Cycle Time.

The eManager session running from the VOX Agent is different than the eManager Session running from the Nightly Agent (Server Shutdown). The eManager session from the VOX Agent runs "Delivery Confirmations" and "Stored Messages" in a non-duplicating mode (where confirmed transactions are stamped with today's date and are thus filtered from that point forward).

While the eManager session running from the Nightly Agent runs the "Daily" email routines such as Occasions Reminder, Billing, and Payment on Account.

## eManager Maintenance

### Reports

To obtain a report of emails built/sent in each session, simply click on the "Print" button. For Customers eMail listing, please access the Report Launcher.

### Archived eMails

In order to keep historical records of emails that have been transmitted, the system automatically makes archived copies of emails that have been successfully transmitted.

The "Current" grid contains the information from the "Last Build" by default, and with each new "build" the contents of the eManager grid is over written by the new build.

But in order to view the contents of email messages from previous eManager sessions, simply click on the "View History" button.

The system replaces the contents of the eManager grid with all the Historical records, and the label of the button is changed to "View Current" (it acts as a Toggle switch).

You can then move up/down on the grid and access the specific transmitted email you were looking for, and once you are done, click on the "View Current" button to return to the eManager's current session.

## eManager File Attachments

You can use File Attachments to send Special Promotions and Marketing Bulletins to eManager recipients.

The Attachment Selection Interface is quite simple. Just click on the "Attach" button and select the File you want to attach, using the File Selection Utility. If you click on the Cancel button, the file name is left BLANK, and no File Attachment will be sent..

Once you have selected a file, the system will ask you; whether you want to use the same file attachment for all the other emails in the current eManager session?. Answer "Yes" and everybody in the current session will receive the same file attachment. A very important "time saver" when sending the same attachments.

To enter the selected File Attachment, click the "Attach" button which activates the "Input box" where you can enter the File Name, allowing you to confirm and verify the file name, if it is already selected.

You can modify the file name, if you choose. But if you want to use the "File Selection Utility" again to select a different file, you need to first blank out the file name in the "Input box" and hit the Enter key. Now, the next time you click on the "Attach" button, the "File Selection Utility" is activated.

# Sending HTML eMails

Html formatted emails are far more effective than "plain" emails since they can provide color and mood to the outgoing emails and thus gather more attention.

The eManager has been upgraded to support; sending of HTML emails.

## What is HTML ?

- HTML (as opposed to "Pure Text" is the language of "making websites". However as far the eManager is concerned, it allows you to accomplish the following important goals;
  - Include Promotional Pictures/Photos and your shop's Logo inside the email itself.
  - Lets you control the Position, Color, Font Name, Font Size, Italic, and/or Bold attributes of each letter in the email.
  - Your "email" and "website" links will be "live links" (meaning clicking on the website address in the email, will actually take you to the website).

### How does it work ?

As a quick lessen in HTML (so that what you'll see in the eManager's Template Editor will not surprise or scare you), is that the idea behind HTML is quite simple. It uses "Tags" to turn ON or OFF a specific behavior / attribute. For example:

```
<u><b>This will display as Underlined and Bold<\u><\b>
```

Because the <u> tag turns on the "Underline" attribute and the <\u> tag turns it back off (the same with Bold). Here's another tip; the tag <br> adds a new line, and so forth. There are all kinds of HTML Starter Books, if you really want get fancy.

## How to implement HTML ?

The GOOD NEWS is that you don't have to know or learn HTML right now in order to start sending HTML emails.

The eManager already has your basic HTML templates which contain; your shop name, shop phone#, address, sales message, invoice notes/fob, website and email address (all coming from your "Session Defaults" page), so that there is no need to customize the existing HTML templates.

- In order for your website link to work, you MUST include the http:// before the www. in your website address (in Session Defaults).

So, you are wondering "How do I switch to HTML" ? And the answer is "simple!", here's what you do;

- 1) Check the new checkbox "HTML Mode" on the eManager.
- 2) Now go to each section's Template Editor (click the buttons with the Pencil icon) and then click the "Default" button. That's it... Your next email transmission will be in HTML.
- You may want to do a Build and then click the "Msg" button for a certain row to see how the emails will actually look in HTML format.

### Your Shop's Logo

If you like to put your shop's logo on top of the outgoing emails, here is what you need do.

Currently the Daisy flower that shows up on top of going emails is a link to a file that is located on Visual Ticket's website. The link looks like this in the Header template:

```
src="http://www.visualticket.com/images/yellow_flower.jpg"
```

To change it to Shop Logo;

- Upload your shop logo file to a folder on your own website and
- Change the above link to point to the Logo file on your website.
- Then you can mess around with position (changing "center" to "left") or the width / height parameters to achieve the most optimum placement.

### Pictures of Products

The above tip for placing your Shop Logo in eManager emails, also serves as a good example for adding pictures of arrangements/products that you like to promote in the "Mass Mail" template.

Use the same kind of link such as;

```
src="http://www.visualticket.com/images/yellow_flower.jpg"
```

in the Mass Email template.

Another alternative would be to link a whole website as the SPECIAL offer (in the Mass Mail template) and let a picture (or a website) speak a thousand words....

## Features to facilitate HTML

The following new features have also been added to eManager to better support the sending of HTML emails.

- The "Msg" button (w/ open folder icon) on the eManager grid, allows you to VIEW the email in HTML format via your Web Browser. By using this button you can determine the overall look and feel of the outgoing emails (in either HTML or Text modes).
- On the Template Editor form, there are 3 additional buttons located next to the "Default" button on the bottom.
  - The first two allow you to perform simple Cut & Paste functions, while the
  - "Open Folder" button allows you to VIEW the specific template you are working on in actual "HTML format" using your Web Browser. This way, you can make changes to various HTML tags and immediately see the results.
- Added to the list of Keywords the "Public Keywords" such as the shop name, address, phone, website, email, etc. (as listed above) for insertion into eManager Templates so that no customization is required..

## Should you do it ?

Visual Ticket offers ADEQUATE HTML templates that are generic and don't need any customization. But, if you like to go further and improve or customize the impact of your outgoing emails, then you need to use some of the above techniques to achieve those results.

But if the above sounds a bit overwhelming, you can always hire an HTML Programmer (ie; Website Designer) to help you spice up your outgoing emails by adding your shop personality, themes, music, moving images, or just elegance in it's simplest form, it may be real worth it, given how important the impact of your Marketing Campaigns really are.

Due to popularity of Personal Website among the younger generation, HTML Programmers are abundant and maybe hired at reasonable cost.

Adding HTML capability to Visual Ticket's eManager makes your Marketing Campaigns that much more effective and thus increasing profitability....

So either way, you may want to consider using HTML emails starting right now!

## Direct & Immediate emails

You can click on couple of buttons and email the following attachments directly to the Customer Directly and in Real Time:

- The Hard-Copy (printing either from the Hard-Copy button at the bottom of the Order pad, or from the Payment form by clicking the "Invoice" button. You can email the Hard-Copy even for General Sale or Wire-Ins (in which case you are prompted to enter the eMail address).
- Customer's History/ Invoice Tracking report (printing from Customer History form by clicking the History button.
- The Event Work-Sheet (by clicking "Print Worksheet" button located on the "Finish" page).

To enable this feature, you must TURN ON the "Save/Send ToolBar" option located at the bottom of the System Tab in Session Defaults (Setup menu).

Then once you click one of the above buttons, the option to "email the ticket (or the report) directly to the customer" is presented.

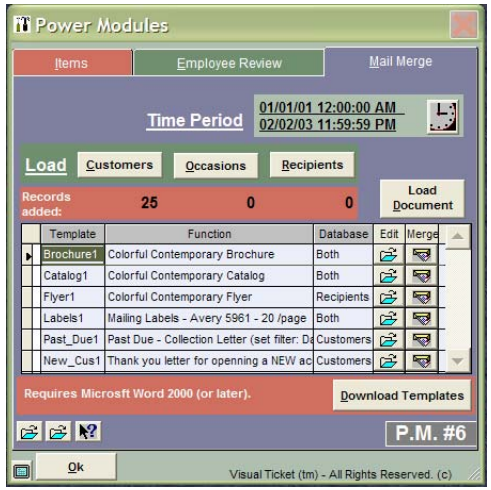
This powerful feature uses the same Direct Email Transport modules used in the Billing Module's eMail button and as such it requires the "eManager" and the "Power Module" features to be available on that station.

Please consult your Visual Ticket Sales Rep. to add these features to the staton of your choice.

For the contents (or the body) of the email itself, it uses the Billing / Direct Email Template accessed by clicking the Template button located at the bottom of eManager Setup form (or at the Billing Module in the Email section).

# Mail Merge

## Power Module #6




The Visual Mail Merge (Power Module #6) takes the incredible power of Mail Merge technology and combines it with "Interactive" Microsoft Word sessions and flexible template design and data exchange facilities.

If you have not yet opted for a Color Laser Printer, now would be the time to consider it. With a color laser printer, you can print professional quality marketing material targeted precisely to the audience you intend to capture. The mail merge output can be anything from Brochures, Flyers, Catalogs, Postcards and Rotary cards (from various available Avery cards and labels), to Delinquent Account notices, etc.

### Overview

This is one of those opportunities, that that if used properly, with a little investment of your time (to customize the templates to your specific needs), you can launch effective marketing campaigns and gain that extra advantage over your competition. Maybe you should consider your next mass mailing campaign, right after you finish reading this section.

The Mail Merge power module belongs to the "Power Module / Spell Checker" group of features available on any station configured with this feature enabled. The advantage of having this feature available on more than one station is that you can have a different set of Data Source, with different versions of templates on each station.

When the Mail Merge utility fetches the data, it also includes your "shop name", "shop address", etc. from the "Session Defaults" setup on that station. So, please make sure the company name and address does not say "Visual Ticket Evaluations" (which is the factory setting).

## Mail Merge Templates

### Loading the Latest Templates

Mail Merge templates are Microsoft Word documents that have Mail Merge fields inserted in them. These templates are downloaded by the Internet Agent and copied on to the local C:\sms\vft\Merge (originals) folder on each station (if the station has Internet Agent capability). If not, it copies the templates from the VT Server.

As you access each template, a copy (which we call the "My Version" or customized version) of the document, is copied and kept in the c:\sms\merge\uMerge (user's) folder.

As a result, you can always download the latest batch of the templates to view and evaluate, without having them copied onto the versions you have already customized (the "My Version" templates in the uMerge folder). So, when you click on the "Edit" button, you are prompted to select from:

- Load "My Version" to further customize. This loads the template in the "uMerge" folder, safe from being over-written by future Template downloads.
- Load the "New (original) Version" for Viewing purposes only. When you make this selection, you should make sure that you don't make any changes to the template, since it will be over-written the next time you download templates (this would be Factory template located in the "Merge" folder).
- Copy the "New Version" to "My Version" to customize from scratch. You would select this option when you intend to discard your previous "My Version" of the template, and start fresh with the latest "Factory Version" of this template (you may have recently downloaded).

Visual Ticket Development team regularly adds new templates and enhances existing ones. We recommend that you download the latest Factory Version of Mail Merge Templates whenever you are considering a Mailing campaign. Sometimes, it is also a good idea to download and check for new applications, you hadn't considered before.

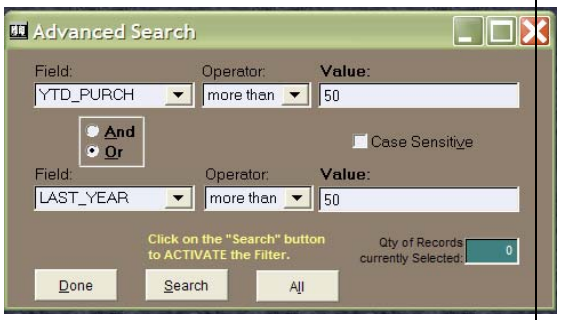
Also, if you already have certain Word documents that you use for any kind of Mailing application, by sending it to us (via email), we could consider adding the necessary Mail Merge Data Source Fields and add it to the Mail Merge Library database. Then, it would be only a matter of a few clicks, before the document is personalized and printed….

# Data Source

## Choosing the Data Source

You can select your "Data Source" from the two major "Contact" oriented databases of Customers and Recipients in the Posted Database. The Data Source for Mail Merge applications is always sorted by (Zip + City) to allow for lower postage rates. The first row of the Data Source file is always the "Column Titles" (or the Field Names).

### Using the Customer Database




You can "Group Select" a set of customers from the Customer database, based on the "Customer Since (CUST_SINCE)" field.

The "Time Period" on top of the Mail Merge form specifies the time interval in which a certain group of customers were added to the system. Thus, allowing you to mail a certain Template to a specific group of customers, who were added during the month of April 2004, for example.

Another automatic filtering criteria affecting the selection of customer records (besides the "Customer Since" time period) is that the Zip Code has to be at least 5 characters long. We believe, any record that has incomplete Zip code was not intended for mailing purposes.

Besides the above embedded criteria, you can add up to two additional Selection Criteria, by using the familiar Filter utility.

For example, above as you see that we are selecting any customer with EITHER ("Year To Date Purchases" of more than $50) OR (with "Last Year Purchases" of more than $50). Using this criteria, you would know for sure, that you are selecting true "Recent Customers".

You can also select a single criterion of say ("DAY60" more than $1) to select customers that have "60 Day old balance". To send a real nasty Collection Letters, you may want to select the "Day120 column to be more than $50".

The point you want to remember is that when you are selecting customers based on the criteria selected from the "Filter utility", you must open up the Timer Period (for the Customer Since date) to include all customers (from the date you started using Visual Ticket).

For more Advanced Users, the Data Source for Customer Database is located in the file: c:\sms\vft\Merge\zList.txt

Which is also available in Excel format using the file c:\sms\Merge\zList.xls

Here's a list of Customer Data Source fields that can be inserted into any Mail Merge document:

### Choosing between two dates

When selecting customers for Mail Merge, the Time Period specified maybe chosen for either;

- The Customer Since date (CUST_SINCE), which is when the customer was originally added to the database. Used for mailing to customers, one group at a time, based on when they were added.
- The Last Purchase date (LAST_PURCH), which is the last day customer placed an order. Used for mailing to Active vs. Non-Active customers.

### Using Occasions Reminder

The "Load Occasions" button on this form also retrieves Customers from the Customer Database, but it will do so in conjunction with the Occasion Database. Instead of select a group of customers based on a specific Selection Criteria using the "Filter" utility, it simply selects customers that have upcoming Occasions during the Time Period specified.

The Mail Merge module also allows you to filter for a specific "Occasion Key Phrase", such as "BIRTH", or "ANNIV" to select for example, Birthdays or Anniversaries, in case you are mailing an "Occasion Specific" material. You may enter Blank, to select all occasions.

So, all you have to do to mail out Happy Birthday /Anniversary Reminders for all those Customers with Special Occasions coming up during the next 30 days for example, is to simply select the corresponding Time Period, click on the "Load Occasions" button and Bingo, you're there !!

When you select Customers using the "Load Occasions" button, the Mail Merge utility also adds the following Data Source Fields to the zList.txt Data Source. These fields are otherwise empty when you click on "Load Customers" button instead.

## Data Fields

### Customer Database Fields

Customer Data Source fields that can be inserted into any Mail Merge document are:

| | | | | | |
|---|---|---|---|---|---|
| Seq_No | State | Cell_Phone | YTD_Purchase | Last_Fin_Charge | **Customer_Memo** |
| First_Name | **Zipcode** | **Customer_Since** | **Last_Yr_Purchase** | **30_Day_Balance** | Last_Aged |
| Last_Name | **Account_Id** | **Last_Purch_Date** | **Auto_Discount** | **60_Day_Balance** | Ave_Purchase |
| Company | **Phone_1** | **Last_Payment_Date** | **Credit_Card_No** | **90_Day_Balance** | eMail |
| Address | **Phone_2** | **Balance** | **CC_Exp_Date** | **120_Day_Balance** | |
| **City** | Fax | Credit_Limit | Account_Notes | Total_Late_Balance | |

### Occasions Reminder Fields

Occasions Reminder Data Source fields that can be inserted into any Mail Merge document are:

| | | | |
|---|---|---|---|
| Occasion (description of the upcoming occasion) | Occasion_Month (The month number of the Occasion) | Occasion_Day (The Day number in a month of the Occasion) | Occasion_Date (Date of the Occasion spelled out in full). |

### Recipient Database Fields

Recipient Data Source fields that can be inserted into any Mail Merge document are:

| | | | | | |
|---|---|---|---|---|---|
| Seq_No | State | Sender Phone | MFS_Id | Wire Shop | **Time Delivered** |
| First_Name | **Zipcode** | **Card Msg** | **Item_Id** | **W-Shop Code** | 'Last_Aged' |
| Last_Name | **Account_Id (of Sender)** | **Delivery Notes** | **Delivery Chg** | **W-Shop Phone** | Minutes spent on Delivery |
| Company | **Phone_1** | **Order Datee** | **Delivery Date** | **W-Shop Staff** | Driver |
| Address | **'Phone_2** | **Order Time** | **Delivery Time** | **Occasion Code** | |
| **City** | Sender | VT_Id | Delivery Service | Time_In Truck | |

It is important to note that you can have the Micro Florist "Learn Special Occasions" (namely Birthdays and Anniversaries) from previous Delivery Tickets (based on the actual Occasion of the Delivery Ticket), without having to actually ask the customer and enter it during Order Entry.

So, after a years of using the Visual Ticket, you may want to go to Micro Florist's Services Menu, go to "Occasions Reminder" and then select "Learn Occasions" from the menu.

### Using the Recipient Database

You can "Group select" a group of Recipients from the Posted Delivery database, based on the "Delivery Date (DELIV_DATE)" field. The "Time Period" button on top of the Mail Merge form specifies the time interval in which a certain group of recipients were added. Thus allowing you to select a specific group of Recipients, added during the month of March 04, for example.

The same rule about Zip Code has to be at least 5 characters long, applies here as well.

- Since Recipients are not unique (like customers), meaning in the Delivery database, a certain Recipient may show up again and again, this the Mail Merge module automatically filters out all the duplicate Recipients based on their Home (or Main) Phone number, while selecting the Latest Delivery Tickets (to insure the most up-to-date address information).

### Grouping to Reduce List

When performing Mail Merge for Recipients, you also have the option to

- Reduce List by GROUPING the SAME Recipients ?" (YES / NO / CANCEL)

  - YES: Same as before where deliveries to the same recipient are Grouped into only one record.
  - NO: For Funeral cases, each Delivery is listed as a Separate delivery.
  - CANCEL: Cancels the Mail Merge operation.

### Filtering

In the case of the Delivery database, all Wireout Recipients (out of town folks) are also automatically excluded. So, the Wire Shop, Wire Shop Phone, etc. fields only apply to the Sending Florist for all Wire-In orders.

All of the above embedded criteria is automatically enforced to simplify your job of selecting "relevant" records.

On top of the above automatic embedded criteria, you can add up to two additional Selection Criteria by using the Filter utility (the same was as we did with the Customer Database above).

An example of a Selection Criteria for Recipient Database would be to select (OCC contained in 37) AND (PROMO1 equals X). Thus selecting Anniversaries (FTD code 7) plus Birthdays (FTD code 3) AND Promo dropdown#1 with "Mail Promotion = X" (from the Promo #1 dropdown located on the Enclosure Card form on the Order Pad) for the all unique Recipients with Delivery Date within the Time Period specified. Of course these conditions would be valid, only if you have enforced the proper tagging of orders (selecting Occasion Codes), during order entry.

For more Advanced users, the Data Source for Recipient Database presented is the file: c:\sms\vft\Merge\zList2.txt

Which is also made available in the Excel format in c:\sms\Merge\zList2.xls

### Browse / Modify / Excel

You can BROWSE the Data Source records, as well as MODIFY them, before you perform the Mail Merge. The checkbox labeled "Browse / Modify / Excel" that is located under the Mail Merge grid lets you;

- 1) Browse the Data Source records (Customers, Occasions or Recipients) to see which records will be included.
- 2) Modify and make changes as necessary. You can also press Ctrl+T to DELETE unwanted records (before Merge).
- 3) Create the zList1.xls and zList2 Excel output files containing the Data Source records.

The important point to remember is that you need to check this checkbox BEFORE you click on the "Load" buttons (Customers, Occasions, Recipients).

## Mail Merge Procedure

- Download the latest Templates,
- Set the Time Period.
- Select Customers and/or Recipients based on your Selection Criteria.
- Click on Load Documents. This will list the documents in the Mail Merge Grid.
- Click on the "Edit" button to view each Template and choose the one that is applicable. Always select "Load My Version to customize", unless you want to

View the Factory (default) version of the template, in which case you would select "Load New (Factory) Version".

- Customize the Template for your specific Mailing campaign and save it. This is the step that requires a little of your time and creativity, and is only necessary the first time you use a given template.
- Click on the "Merge" button to perform the automatic (and Interactive) Mail Merge operation.
- Check the "Letters 1" document and do a "Print Preview". If all looks good, PRINT IT !!.

You can click on the "Open" folder buttons located on the Lower Right corner of the Mail Merge form, to view the "Data Source" (loaded in Microsoft Word). The first button loads the Customer data source, while second button loads the Recipients.

When editing the Template in Microsoft Word, make sure the Mail Merge toolbar is visible (check the View menu and select Toolbars). Then from the Mail Merge toolbar you can click on "Insert Mail Merge Fields" and ADD more fields (the same fields you see in the above Data Source Fields tables).

You can then click on "View Merged Data" to toggle between the "Field Names" that appear between << and >> and the Actual Data (inserted for each field) to see how your changes look once the Data is merged.

## Customer VIP Cards

Customer VIP Cards are now available in Report Launcher under "Listings" option button. The VIP cards print on Avery Label stock 5389 with card sizes of 4" X 6" in 1 column.

You can use the Filter utility and Sorting based on your Marketing Campaign requirements. In case you need to modify the VIP Card template to better fit your special formatting requirements, please go ahead and do so. Then email us the files

c:\sms\vft\reports\cuslbl2.LBX

c:\sms\vft\reports\cuslbl2.LBT

and we will go ahead and use the "first" submission as the "Default" Template. Otherwise, if the template is not added to list of default templates, the modified version of the template will be overwritten with your next Visual Ticket download.

# Advertisement Tracking (AT)

You can track sales generated by various Advertisement Sources and optimize your marketing campaigns.

So, now is the best time to start tracking your Advertisement Campaign effectiveness and spend those precious Marketing Dollars where the really makes the MOST difference.

### Assigning AT Codes

- For General sales and QuickCash, the Advertisement Source Codes are assigned in the Other Info. Form.
- For Account Sale, the customer's Advertisement Source Code is assigned in Customer Profile's Setup button.
- For Account Sales, you can set the Default value for the Advertisement Source Code (to be assigned to New customers by default) in the Setup Manager's "Customer Defaults" Access..

## AT Names / Report

From the Report Launcher, select the "Advertisement Source Tracking" report and click ""Run".

### Changing AT Names

You can define (or change) the "Advertisement Tracking" descriptions from the "Drop-down List #2" tab of the Setup Manager.

The report also allows you to Modify the "Advertisement Source Names" before it actually previews/prints the report. If you chose to do so, from the Browse window change any of the Advertisement Source Names you see fit, per your requirements.

### Choosing Sale Types

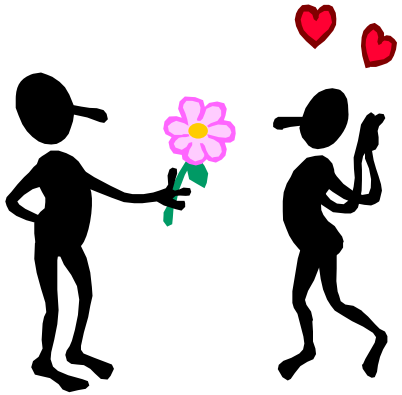
When printing the Report, you can filter for the following types of sales:

- All Sales
- Account Sales
- General Sales + QuickCash Sales

### Printing AT Sales Details

To filter for a certain Advertisement Code in one of the Posted Sales Reports in the Report Launcher, click the "Filter" button on the "Posted Sales Selection Utility", and chose;

- The field LEAD_SRCE2 for Account Sales. Select "Equals" operator and enter 06 (for #6). This will select all customers that were setup with Advertisement Source Code # 06.
- To include General /QuickCash sales entered with the same Advertisement Source (in the Other Info form), select the "OR" operator, and for the second field select LEAD_SRCE. Then select the "equals" operator and enter the same 06 value.
- To Activate the filter scenario you have setup, click on the "Activate" button. The system shows you a list of qualified sales and counts them.
- If all looks good, click on the "Done" button to exit the Selection Utility and preview the Filtered Reports.



## Occasions Reminder

### Overview

The Occasions Reminder module is integrated into (part of) other VT modules, and by working together, these bit and pieces of software fit together here, to let you take advantage of Human Race's infatuation with "Dates" and anniversaries. It can be a big part of your revenue, if planned, implemented and executed properly. The Occasions Reminder system is supposed to remind you (not the customer) that one of the following three events are going to happen in the next couple of days;

- A Birthday is coming up.
- An Anniversary is coming up.
- A Sales Tax Exemption is about to expire! (This is a "service" you provide for your Tax Exempt customers, and is not really part of the Marketing Campaign we are discussing here. So, we just put it aside for the time being.).

Obviously, the Birthday or the Anniversary event must have been important enough to somebody, for your shop to have the information.

Somebody either said it on the phone, that this is an important event, or somebody spent money to celebrate the even previously. This means, if you hurry up and come up with as plan, you will get that revenue, before the shop across the street does. If this is what it takes, are you in or are you out ?

### Implementation

#### How to get the data ?

This is where Visual Ticket comes to the rescue. There are 2 different ways to get this information. They both require some level of commitment.

**Ask the customer**

Obviously, the first way is to ask the customer!.

But in order to do that, you (assuming you are the operator) must say the right things to the customer, so that s/he trusts you with this personal information and is willing to give it to you. For a Flower Shop however, it shouldn't be that hard to do. Especially, if the customer is already calling to order a Birthday or an Anniversary item.

To enter this valuable information into VT, while you are entering Customer Profile during order entry, simply click on the **Setup** button and then click on "Occasions". This form is activated.

Click on **Add**, select the correct dates on the **Month** and the **Day** spinners, then dropdown the **Easy Pick** dropdown to select from one of the "Canned" occasions. Hit the **Tab** key and the Occasion is inserted into the "Occasion Description" field, allowing you to fine tune the verbiage.

The way you word the Occasion Description is exactly how it is going show up in Mail Merge or eManager messages in the context of "Your Mother's Birthday is coming up…". So, enter it accordingly.

While you are on a roll, you might as well get as many occasions as you can from the customer. At least all the ones he knows by heart. Since those are the important ones. Remember, each one can be a continuous source of revenue, year after year, and most importantly will establish your shop as his/her Personal Florist.

## Data Mining

Data Mining refers to some kind of Artificial Intelligence going thru past history, and extracting valuable trends or useful information that can be turned into Money. This important module is available in Micro Florist's Occasions Reminder selection (on the Services menu) called "Learn Special Occasions".

The method by which this module extracts Special Occasions is to search in past Delivery Tickets and find those with Occasion Types 3 and 7. The **Occasion Type** dropdown is located under the Enclosure Card message (on both the Combined and Card forms on the Order Pad). It then adds the Due Date of those Delivery Tickets with the Name of the Recipient as the special occasion for that customer.

But as you see, the "commitment" we talked about above, needs to be there to make sure you and your operators always select the correct Occasion Type, especially for Birthdays and Anniversaries.

## Using the Occasions Reminder

### Mention it

The least expensive and probably the most effective way is to simply click on the Occasions button located on Customer's Profile, while you are talking to him/her to see if any Special Occasions are coming up for the customer in the next few days. If these is one, you can simply say something, "well I see your Mother's Birthday is coming up next Thursday, why don't you let us do something special for her, this year ?

So, the information is absolutely like GOLD to have it when you need it. But, this is usually a "Sell Up" scenario, and it is not going to help your phones ringing.

### Send a Post Card

Usually a nicely designed personal POSTCARD sent about a week in advance, will do the trick, ring the phone and get the order. Please see Power Module # 6 discussed in detailed, earlier in this chapter.

### Send an email

Of course sending EMAIL is lot less expensive, and sometimes more personal. It may eliminate the possibility of the person who is supposed to be receiving the gift, to actually see the Reminder postcard. Sometimes this is good, sometimes it not.

Another HUGE advantage of Occasions Reminder emails sent via the **eManager**, is of course the ability for the customer to simply answer the email, with his order!

If you have the eManager, you definitely want to get into Occasions Reminder "business". In short;

# The Sender List

## For Thank You Notes

Have you ever had a customer (from the family of a Deceased) request the list of friends and family who sent Funeral Arrangements to a Funeral Home for services held for their Deceased family member ?

Well, not only you can generate the list, you can also email it within 10 or 15 minutes from the time the customer calls and requests the list !!.

- You need the Power Modules feature to generate the list and
- The eManager feature to transmit the emails.
- You also need the VOX (or the less expensive "VOX Express"), to send the messages in REAL TIME.

### Power Module # 11

- From the **Admin** menu, select **Power Modules**, go to the Power Module #11 (under **Services** tab).
- Select the Time Period for the orders.
- Select the Recipient (or the Deceased name) from the Recipient database (click on first **Select** button).
- View and confirm the "Recipient / Sender List" which is displayed in a Browse window. Close the Browse window.
- Then select the Customer who requested the list (click on second **Select** button).
- Bingo!. You have the list inserted into Customer's Stored Message (ready to be transmitted in eManager's next cycle).

**Your Options**

- You can delete certain Senders from the list by pressing CTRL-T.
- You can fine tune the "Recipient / Sender" list by changing the First and Last names of the Recipient.
- The list is appended to customer's existing Stored Messages (what was there before, stays there until the email is transmitted).
- The list is also copy to "Windows Clipboard". Thus if you need to copy the "Senders List" to another document you can simply right click and select "Paste" (or hit Ctrl-V) to paste it.

To send the Stored Messages (along with Delivery Confirmations, etc) in real time, you need to have the VOX Agent setup to run eManager sessions every few minutes.

To do so, please go to **VOX Setup** (under **File** menu), and check the box "**eManager Build/Transmit**" checkbox. Also, go to the Agent Launcher (under Agents menu) and schedule the Agent to launch (if not already).

When your eManager is operating in HTML mode, the customer emails listed on the email received from you, are LIVE LINKS. In other words, as the customer receives the email from you, he or she can quickly click on the email links and send his/her "Thank You Note" by email right there and then. Pretty convenient, don't you think ?!

You can select a recipient, and send the email to your own account, to check it out. This is truly "TOP OF THE LINE" Customer Service, folks! So, let your customers know about it. It will be a while before your competition across town can deliver such service.

The eManager is fully automatic and it brings in the orders!

# NOTES

# Chapter 13

**Recommended read for:**

1) System Manager

## Orders Transfers (VOX)

### VOX Operations

The Virtual Order Transfer (VOX) module is a highly sophisticated order transfer vehicle that provides for;

- **VOX Mode-1:** Bi-directional order transfers between the Main Shop and Branch stores via "Dialup Networks". This mode is for multi-location shops located in a short distance vicinity, where telephone connections are not long distance. Orders are transferred as a whole set, and they are stamped as "Exported" orders with order processing (posting) performed either at each branch shop or at the main store. In this mode resource files (customer, inventory, etc.) are automatically uploaded at the Main shop, and downloaded by each branch store, based on a set schedule.
- **VOX Mode-2:** Bi-directional order transfers between the Main Shop and Branch stores via the "Internet". This mode is for multi-location shops located in longer distances, where telephone connections are changed at long distance rates. The order transfers occur as mentioned above. Internet Hosting is provided by Visual Ticket for a reasonable monthly maintenance charge, based on the volume of transfers.
- **VOX Mode-3:** Unidirectional order transfers via the Internet from multiple Web-sites to the Main shop. Orders are placed by shop customers directly on the Web-site(s), and are then converted from HTML to OTP by the CGI routine running on each web-site's host. The OTP format is published by Visual Ticket, which specifies the format of the input file in a field by field detail. If you are interested, please have your Web Master send us an email, requesting a copy of the latest OTP specifications. The VOX Agent automatically downloads the OTP files (using the FTP protocol) periodically (every so many minutes), and translates them into Visual Ticket Orders, and places them into the Order Pad. In this mode, orders are received as Local Delivery, or Wire-out orders depending on the contents of the OTP file.
- **VOX Mode-4:** Unidirectional order transfers via the Internet between independent shops and a Central Design Location. In this mode orders are sent using various Internal Business Protocols (order splits are based on percentages) and orders are transmitted as wire-outs (at the sending shop location), and received as Local Delivery at the Design Center location. Internet Hosting is provided by Visual Ticket.
- **VOX Mode-5:** Bi-directional order transfers between Visual Ticket Server and a "Foreign System" accessed through a LAN (Local Area Network), or a WAN (Wide Area Network). Orders are translated into OTP format by the "Foreign System" and placed in a specific input / output directories by both systems. The VOX Agent imports/exports orders based on a preset schedule. Due to the special requirements involved in such setup by various external systems, additional custom software modules maybe necessary.

## VOX between Main/Branch shops

Order Transfer between the Main store and Branch Shops can be achieve in Thin Client configurations using Terminal Services as a whole different approach for connecting the Branch shops and the Main Shop as a virtual Wide Area Network running on a single Server. This approach is discussed later in this chapter.

In the VOX mode, individual orders are sent back and forth between different VT servers. While in Terminal Services setup, all orders actually reside on the Main server and each station act as a Dumb Terminal that logs into the server via the Internet.

As mentioned above, this maybe accomplished by either **VOX Mode-1** or **VOX Mode-2** based on whether or not the phone connections are local or long distance. As far as the operation of the VOX Agent is concerned, the two modes are identical in the manner they handle the orders, the only difference being the delivery vehicle.

The **VOX Mode-1** requires the establishment of "Dialup Networking" between the locations. See your Windows User's Guide for further information on "Dialup Networks". Once the Dialup Network is established, you would then map the VOX Server Drive at the Main location (the disk containing the Visual Ticket data) as the V: drive. Then in VOX Setup form, you would specify V: drive at the Remote Location, and C: (or S:, if you are using a Dedicated Server) Drive for the VOX shared Drive at the Main shop. Please note that in Dialup Network specification, there is a checkbox labeled "Connect to Network ?". Please make sure that this checkbox is checked. This will make the Remote station appear as though it is actually part of the Main shop's Network (LAN), although with a far less band width.

For simultaneous Dialup Connection from multiple Remote stations on the VOX Server, you obviously would need multiple modems (one per Branch shop). You could connect these modems to the VOX Server directly (by installing extra COMM ports), or have the Remote Station dialup another station on the Network (at the main shop), and connect to the VOX Host's drive c:, via the network. We recommend direct connections, since this way the second station on the network need not to be turned on, before the Remote station(s) can make a Dialup Connection to the Host.

For a less elaborate setup (where dedicated phone lines for each Remote shop is not a possibility), you may decide to initiate the Dialup connection from a Remote shop, run the VOX Agent from the Agents menu (where it only runs once and then terminates), and then disconnect the line, making the line (at the Main shop) available for another Remote station to call. Please note that in this mode, VOX operations will still be performed in a bi-directional manner (orders from the Host, will still travel to the corresponding Remote shop), for the simple reason that the Host deposits the outgoing orders in it's local drive, where the orders are then "picked up" by the remote station, once the connection is made.

The **VOX Mode-2** on the other hand requires the establishment of an Internet connection. Once you have access to the Internet, Visual Ticket will establish the required setup on it's Internet Host to provide the Hosting Services for order transfers between the various locations. In this mode, the VOX Host, as well as the Remote station(s), all deposit their outgoing orders into corresponding secure "Mailbox" folders established for each one of your locations, on the Internet.

After the connections are made, you would then need to setup the VOX Agent for order transfers at each location. From the File Menu, select "Virtual Order Xfer (VOX)". If the Transfer Protocol is not already setup for your location by Visual Ticket, please select either "Orders via Network", or "Orders via Internet" accordingly, for **VOX Mode-1** or **VOX Mode-2** respectively. For **VOX Mode-1** specify Drive V: for the Drive designator of the VOX Server disk Id.

Now, click on the "Setup" button, and check the "Enable VOX Operations" checkbox. This is the main switch for turning on VOX Operations on your system. Once this switch is turned on, the system handles Order Entry, Printing, and Processing operations according to the VOX requirements. This means that Production Tracking, Delivery Tracking, Printing (by the Print Agent), all become Division Specific (they only access orders when the Assigned Division is the same as the default division).

You would then specify whether the station is a Host or a Remote station. We recommend that you use Division #01 for the Main Shop. The Division number for each session is specified in Session Defaults. Please make sure that each Remote station has a unique Division number (ie; 02, 03, …), while Division # 01 is reserved for the VOX Host (at the main store).

Please verify that the checkbox under "VOX Export" labeled "Place Orders in separate files" is checked for normal VOX operations.

**NOTE** Unless there are only 2 locations and you want to minimize the quantity of files going across the network. If there are more than 2 locations, then combining orders for different Divisions into a single file will cause orders at the Main shop that are destined for Division 3 to go to Division 2 first, and then be sent to Division 3 via Division 2 (causing delays in order transmissions via VOX).

### Dial Up Automation

- The VOX Agent automates the entire "Dial Up Connection" (RAS ) subsystem using sophisticated technology. It determines whether Dial Up Connection is active, and if not, it automatically initiates the Dial Up. The most important benefit of this feature is that it eliminates the need for Operator intervention when/if the Dial Up Connection is lost.
- Since the Remote stations (i.e.; VOX Clients) always initiate the call, this feature only applies to the operation/setup of the Remote VOX stations.
- In order to activate this feature, select the name of the "Dial Up" connection (assigned to VOX operations) from the DropDown control. You can disable the "Dial Up Automation" feature, by selecting "Blank" for the Dial Up Connection name on this form.

### Dial on Demand

- The VOX Automation feature also provides you with the "Dial on Demand and Disconnect upon completion" feature. What this important feature really means to you is that it eliminates the need for a "Dedicated" phone lines for each Branch shop you have, at the Main shop. Shop, saving you a lot of money each month.
- In order to activate this feature simply check the "Dial on Demand Checkbox" on this form. With this feature activated (on the Remote Stations), once the Remote Stations initiate the call and complete the file transfers, they simply Hang up!. This opens the lines at the Main shop for other stations to call, or freeing up the line, for Fax or other applications.

### Resource Files

Resource Files (Customer, Inventory, etc.) are automatically uploaded by the Host, and Downloaded by Remote stations during **Server Shutdown** at each station. The Resource File update schedule is normally set to "one" day. If you enter zero for this field, the system updates the Resource Files every time you perform a Server Shutdown. In order to properly synchronize the uploading and downloading of Resource Files, it is best to perform Server Shutdown on the VOX Host first, (upload), and then do the Server Shutdown on the Remote stations (download). You don't have to necessarily wait to do the Server Shutdown on the Remote Station the same night. You can always do it, the following day before you start your Daily operations at the Remote Station(s).

Please note that you can always "Force" the Resource File upload/downloads by simply clicking on the button labeled "Transfer" on the VOX Setup form. Actually, now that you have setup your connections, and have specified which station is the Host, or the Remote, this would be a good time to test the transfer of the Resource files.

## Completion Criteria

The "Completion Criteria" checkboxes identify the conditions that are considered by the VOX Agent, when uploading orders at each end. Please note that these criteria only apply to Uploading (Export) of orders at either the Host or the Remote stations. Once an order is exported for a given division, it is always imported, regardless of it's status.

If you check the Production checkbox as one of "Completion Criteria" requirements, then you are making "Production Tracking" process a requirement at the Remote shop(s). The same also applies to the Delivery checkbox. If checked, folks at the Remote shop would also need to perform "Delivery Tracking" to update the Delivery Status of the orders.

## Encryption

All your VOX transmissions between Main/Branch Shops, or from your Website can be secured with "Multiple Key XOR" Encryption. And the good news is, it is extremely easy to implement.

In order to activate the encryption feature, you need to create a single (Encryption Key) file. From Windows Start menu, go to Run and type "Wordpad". Now, type in a few characters such as Boston. Save the file as VOX.VOX to the C:\SMS\VFT\IO folder. Now take the same file and put it into the same folder on the Branch Shop's VOX Server, and you are done!!!

For VOX transmissions from your Website, before you do the above procedure, give the file to your Webmaster and ask him/her to download and read the latest OTP (Order Transfer Protocol) specification and implement the Encryption algorithm in his/her CGI routine. S/he can download the OTP document from: http://www.VisualTicket.com/ftp

You must make sure that you turn the Encryption ON simultaneously on both; sending and receiving ends, otherwise there will be trouble!.

You can test the Encryption/Decryption functions by clicking on the "Encryption" button located on the Virtual Order Xfer (VOX) form (lower right hand corner). Please select a file and view the contents of the file afterwards to verify encryption/decryption.

### VOX rules on the HOST

- In order to tag an order for transfer to a Remote shop, simply change the "Assigned Division #" (available on the "Other Info" form) to the Destination division. Orders must always be "Submitted" before they are transferred. .
- Once an order is transferred to a Remote station, a "temporary archived copy" of the order is left behind on the Main Host order pad. Since the actual order will be returned to the VOX Host eventually (once it is done at the Remote location), this temporary Archived Copy is purged the next time the Daily Agent is activated.
- Orders with "Attention" stamp are not transferred, until the Attention stamp is removed.
- Processed orders are also never Transferred. This is to insure that orders are never "Double Posted".
- Cash & Carry orders are never uploaded to the Remote stations. This is because, there is nothing to be done at the Branch store for Cash & Carry orders.
- Wire-out orders are never uploaded to a Remote shop. This is because VOX operations assume that all Wire-out work is to be done at the Main shop for all divisions. This includes Shop Assignments, and the actual calling out (or automatic transmission) of the orders (ie.; via Mercury, AutoFax, etc.). In a multi-line item sale that includes a Wire-out order, the Wire-out order must first be transmitted and verified, before the entire order can be transferred via the VOX Agent.
- Wire-in orders are treated like Local Delivery orders (see the next paragraph). For Wire-in orders coming though the Mercury, the Visual Ticket system automatically assigns the right "Assigned Division" number based on the Wire Service Code (contained on the Mercury order) of each Remote shop (we refer to this feature as the "***Auto-Distribute***" feature). So, for Wire-in orders destined for another Division, the only thing that needs to be done on them, before they are transferred to their corresponding division, is to remove the Attention flag, and submit them.
- You may decide; whether the order should be fully checked out at the Main shop (before it is submitted for VOX), or it should just be submitted, and have the folks at the Branch store check it out, once it gets there. We recommend that the checking to be done at the Main shop. However, if you check the checkbox labeled "Remove Submit Stamp", the order must be verified and submitted at the Remote location again, before it can be sent back to the Main shop (forces double checking).
- Orders that are considered "incomplete" are uploaded to their corresponding Remote stations.
- As mentioned above, the "Completion Criteria" checkboxes on the VOX Setup form identify which attribute of the order is looked at, to determine whether or not the order is incomplete, and should be uploaded. If both Production and Delivery status are checked, then the order will only be uploaded if both Delivery and Production are yet to be done (are incomplete). If only Delivery is checked, then the order will be uploaded only when Delivery is incomplete (the production status no longer matters). If only Production is checked, then the Delivery status will no longer matter.
- If neither Production nor Delivery status are checked in the "Completion Criteria", orders are uploaded simply based on their "Submit Stamp".
- For Pickup orders, since there is no Delivery Status, orders are uploaded based on their Production status alone. If the Production status is not checked in the "Completion Criteria", these orders are transferred regardless of their completion status.
- Orders imported from a Remote Station, are never sent back to the same station (this is to prevent possible Endless Transmission cycles).

### VOX rules on Remote Stations

- Orders that are considered "complete" (based on Completion Criteria), are returned to the VOX Host. (please see "Completion Criteria" above). An Archived copy of the order is left behind for the Remote shop's records. The Archived order will be purged based on the "Purge Parameter".
- In order to tag an order for transfer to another Remote shop, simply change the "Assigned Division #" (available on the "Other Info" form) to the "Destination" division. Orders must always be "Submitted" before they are transferred. The order will first be uploaded to the VOX Host, and from there, will then be transferred to it's final destination. The Completion status of orders that going to another branch shop, do not matter.
- Orders with Attention stamp are not transferred, until the Attention stamp is removed.
- Cash & Carry orders are always uploaded to the VOX Host. This is because, there is nothing to be done at the Branch store for Cash & Carry orders.

- Wireout orders are always uploaded to VOX Host. This is because VOX operations assume that all Wireout work is to be done at the Main shop for all divisions. This includes Shop Assignments, and the actual calling out (or automatic transmission) of the orders (ie.; via Mercury, AutoFax, etc.).
- Wire-in orders are treated like Local Delivery orders (see next paragraph). Once they are completed, they are transferred to the VOX Host.
- If the checkbox labeled "Remove Submit Stamp" is checked, the order must be verified and submitted at the VOX Host again, before it can processed.
- Orders that are considered "incomplete" are not uploaded to the VOX Host, until either Production Tracking, or Delivery Tracking, or Both are performed and the corresponding "Finish Times" are filled out.
- As mentioned above, the "Completion Criteria" checkboxes on the VOX Setup form identify which attribute of the order is looked at, to determine whether or not the order is incomplete, and should be uploaded. If the both Production and Delivery status are checked, then the order will only be uploaded, if both Delivery and Production are completed. If only Delivery is checked, then the order will be uploaded only when Delivery is completed (the production status of the order no longer matters). If only Production is checked, then the Delivery status no longer matters.
- On Remote stations you may also specify that orders not to be considered complete, unless the "Print Agent" fills the associated Print Requests by printing the Production Tickets.
- If neither Production, Delivery or Print Request status checkboxes are checked in the "Completion Criteria", orders are uploaded simply based on their "Submit Stamp". This means you no longer have to update Production / Delivery tracking in order to send the orders back to the VOX Host. Please note that in this case, if the "Remove Submit Stamp" checkbox is also not checked, the orders that come in, and immediately uploaded and sent back to the VOX Host.
- Since for Pickup orders there is no Delivery Status, these orders are uploaded based on their Production status. If the Production status is not checked in the "Completion Criteria", these orders are transferred regardless of their completion status.
- Orders imported from a Remote Station, are never sent back to the same station (this is to prevent possible Endless Transmission cycles).
- If a Division #02 order is received at Division #02, but the shop does not have the right material to fill the order, the "Assigned Division" maybe changed back to Division #01, and the order will be transferred back to Host (Division #01), without having to fill it.

### Processing rules on the HOST

- Once an order is completed, and returned to the VOX Host, the order will be processed based on the same "Completion Criteria". Since orders are never returned to the same Division that they are imported from, please be careful **not to erase** the Production / Delivery "Finish Times". This will create a condition where the order is never uploaded (since it has been downloaded from the same station), nor will it be processed (since it is not yet considered complete).
- The VOX Host Processing rules are consistent with the rules and criteria for uploading orders to branch shops. In general, if an order qualifies to be uploaded to a Remote station, it will not be tagged for processing, until the order is completed and returned.
- The only exception is when neither Production nor Delivery status is checked for the "Completion Criteria". In this mode, orders are uploaded only based on their "Submit" stamp. Since this is the same criteria that is necessary to process the orders, orders will be processed before they have the chance to be uploaded. If this is the intended mode of operation at your shop, then you would need to run the Process Agent **only** during the Server Shutdown (once all orders are transferred to their corresponding remote stations).

### Can't Find that Customers ?

Lets assume we are at a Branch Shop, and we enter an Account Sale order with a brand new customer. The new Customer is added to the "local" customer database, and will show up correctly on the order. Now the order gets sent to the Main shop and the new customer is added to the "Master" customer file at the Main shop. At the end of the day, you perform the usual "Server Shutdown" at the Main shop, which prepares the "Resource Files" (Customer/Inventory) for pick up by the Branch Stores (when we do the Server Shutdowns later on that night, or first thing in the morning). In this case the new customer is already in the Master customer file, and when the Remote shop gets the resource files from the Main shop the customer will be there and everything is fine.

However, here you notice a certain "flow" (sequence) that needs to be adhered to. If orders for a given day are not sent to the Main shop, obviously the Master customer file at the Main shop will not contain those "new" customers. Now if the Resource files are downloaded from the Main shop, the customer information at the Branch store will be overwritten, which will cause the "new" customer information to be (temporarily) lost. So, here is the important Rule:

**NOTE** All orders for a given day must be sent to the Main store, before server shutdown is performed.

It is important to point out that in this case, the Customer information is never really lost, since the actual order (that is waiting to be picked up) does contain the customer information anyway, and will in time, be added to the Master Customer file at the Main shop. This is simply a sort of "Racing Condition" that you need to be aware of. You can relax this requirement by increasing the number of days that "Resource Files" are updated. For example if you specify 3 days for this parameter, then orders must be sent to the Main shop at least once every 3 days (prior to the preparation of Resource Files at the Main server).

## VOX Stamps

As mentioned above, once orders are transferred, an Archived copy of the order is always left behind. These Archived copies have the following stamps, based on their VOX status:

- If "Sold Div." and "Assigned Div." of an order are the same as the Default Div., the order is stamped "VOX Sent" (Default Division is 02, the order was taken at Div.#02, and was filled at Div.#02).
- If "Sold Div." is the same as the Default Div., but the "Assigned Div." (Destination) is not, the order is stamped "Export xx" (Default Div. is 02, the order was taken at Div.#02, and it is to be filled at Div.#03).
- If "Sold Div." is not the same as the Default Div., but the "Assigned Div." (Destination) is, the order is stamped "VOX Done" (Default Div. is 02, the order was taken at Div.#01, and it is filled at Div.#02).
- If "Sold Div." is not the same as the Default Div., nor is the "Assigned Div." (Destination), the order is stamped "Return xx" (Default Div. is 02, the order was taken at Div.#01, and it is to be filled at Div.#03).

## View Pending VOX Orders

The button labeled "View Pending VOX Orders" (available on the VOX Window from the File menu) opens a window that shows any VOX order that is still sitting (and waiting) in the Central VOX Folder ready to be picked up by the (corresponding) VOX Agent.

We recommend that you verify that all orders (pending) in this folder, be picked up and processed, before you run the Server Shutdown at the end of the day. These orders are picked up and processed by running the VOX Agent at the "Destination" location.

The Destination location (the Branch store's Division number) can be identified by the 5th and the sixth character in the File names listed (the two digits after "#").

If there are indeed orders still pending in this folder, you may double click on the file name to view it's contents.

## Orders From Website

In order for your "Shopping Cart" enables Website to operate with the VOX Agent, you Web Mater needs to write a CGI routine to create an OTP file for every order that is entered in the Shopping Cart.

Please see VT News (From the Help menu) Front Page News for a list of companies that have already created "OTP Compliant Shopping Card Websites" and can offer it to you at a very reasonable cost, that you can implement in the least amount of time.

If you need to make your existing Website OTP Compliant (meaning for your Shopping Cart to create the OTP files for each order), please ask you Web Master to review the following specifications for creating the OTP file:

http://www.visualticket.com/ftp/OTP1.pdf

The OTP Specifications contains everything your Web Master needs to know for creating, testing and validating the OTP files. So, we are not going to repeat it here.

Once the website is ready, and the OTP files are generated and placed in to a designated folder on the website, the VOX Agent can be setup to run every 10-15 minutes to download the OTP files and import them into the Visual Ticket order pad.

### Occasion Reminders

The VOX Agent also accepts "Occasion Reminder" entries coming from your website. The system requires the Occasion Tags to be either inside an order file, or if they are not accompanying an order, then the Account_Id specified (in the OTP file) MUST already be present in the Customer database.

This is to insure the Customer Database does not get out of control by bogus occasions added by bogus accounts. So, in order for Special Occasions to be added, either the account must already exist, or the occasions must be part of an order.

If you are interested in capturing Customer Special Occasions, ask your Webmaster to add a section to your website to let customers add their Special Occasions, and then have him/her include such "Occasion" Tags to the OTP files.

That is Customer Service and brilliant Marketing Strategy, combined.

## Running eManager Sessions

Another very important function of the VOX Agent is to close the loop on "Orders From Website", and send out the "Delivery Confirmation" emails for those (as well as other) orders in Real Time (or very close to it) through-out the day. Please see "Automated eManager Session via the VOX Agent" section of the eManager chapter for details.

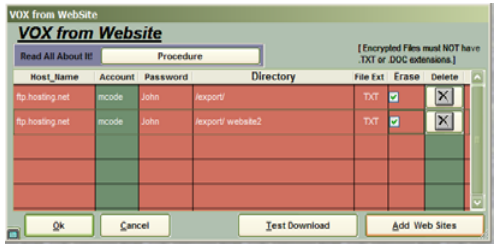
Once any order is stamped "Delivered" by the Driver scanning orders on one station, the VOX Agent running on the Server will create the Delivery Confirmation email for that order and send it to the customer shortly after the order is actually delivered (now that is called "Customer Service"!).

The VOX Agent also transmits customer "Stored Messages" such as "Cashier Receipt", "Decline Ticket", and "Operator Messages regarding an order", etc.

Please make sure you check the "eManager Build + Transmit" checkbox to enable this important feature.

### VOX Setup

From the File menu, click on Virtual Order Transfer to activate the VOX Interface Setup. Select "Orders from Website" from the dropdown control.




Click on Setup button and the following form is activated:

Enter the FTP Host Name, the Account, the Password and the designated folder where OTP files are deposited in.

All the information on this form is Case Sensitive. So, if the download tests don't pass, take a closer look at folder name and especially the File Extension.

While testing downloads, you may want to leave the Erase checkbox unchecked, but once normal VOX operations begin you should check that checkbox to prevent double posting of the same orders every 10-15 minutes.

Once the Test Download passes and orders are successfully downloaded and turned into Valid orders, you can go ahead and setup the VOX Agent to launch.

To do so, go to the Agents menu, go to Agent Launcher, click on the Setup button for VOX. Select the station number (usually Station#1) and check the "Include in Auto-Launch" checkbox.

We strongly recommend that your Web Master uses the XML format of OTP files with full Encryption feature enabled.

For your information, you can furnish your Web Master with a sample OTP file made from your last order in the Order Pad, by simply clicking on "Create OTP" button. This way, s/he doesn't have to start from scratch.

# NOTES

# Chapter 14

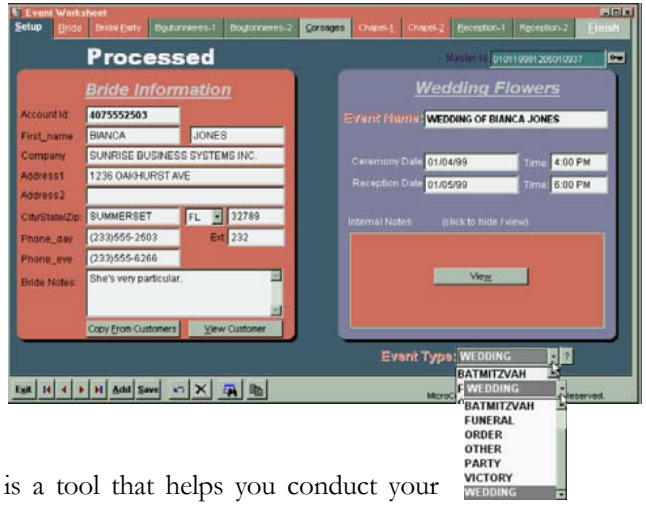
**Recommended read for:**

1) Manager
1) Event Consultant.

## The Event Worksheet ™

### Overview

The Event Worksheet helps you conduct your Event Planning (or Wedding Consultation) sessions in a more organized and professional manner. It allows you to "make those never-ending changes" a lot easier to handle, and do away with all those redlines and modifications. It allows you to put away all those big catalogs, and be able to simply click your mouse, and have the catalog pictures appear magnified, right on your computer screen.




The Event Worksheet is a tool that helps you conduct your Event Interviews with customers, gather all the pertinent information, facilitate the selection of material and services, handle all the issues with respect to pricing and payment, and finally print the proposal (worksheet).

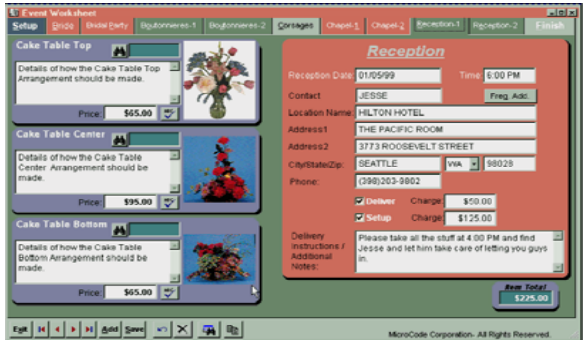
The Event Worksheet incorporates events such as *Weddings*, *Bar Mitzvahs*, *Bat Mitzvahs*, *Victory Parties*, *Funerals*, *Banquets*, etc.

The Event Worksheet handles each event based on the various requirements of that event. In case of weddings for example, the system provides you with the environment to enter the necessary information for the Bride, conduct the Wedding Consultation, select floral or decoration items interactively, determine prices during the interview (or at a later time), enter the payment information, and finally print the Wedding Worksheet (proposal / contract).

In order to explain the components of the Event Worksheet, we will choose "Wedding" as the example event in this brochure. Please note that for other events, the same capability exists but based on the requirements of each specific event, the labels for each section change automatically, to reflect the requirements of that specific event.

### Setting up Events

To setup the Event Worksheet Environment for another event, select the specific event you have in mind from the "Event Type" dropdown, and then click the "Edit" button located right next to the dropdown.



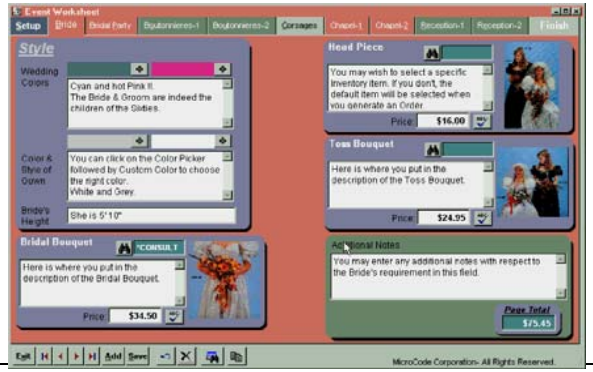

Here you have a Browse window where you can change each and every heading / title on the event worksheet to accommodate the specific event.

### The Events Report

The Events Report (available from the Report Launcher) provides you with the option to sort event based on Ceremony Dates for planning purposes.

### System Components

The Event Worksheet has 11 "Tabs", which in case of a Wedding Event, these tabs are as follows in the table below.



| Tab | Label | Contains |
|---|---|---|
| 1 | **Setup** | Event Type Selection (Wedding in this case).<br>Bride Information (Account_Id, Name, Address, Phone, Notes)<br>Event Name (Wedding of..), Ceremony and Reception dates and times. Internal Notes (not visible to the Bride) |
| 2 | **Bride** | Wedding Colors (can select from a Color Palette of up to 24 million colors, depending on your computer's setup). Color and Style of Gown (same as above). Bride's Height.<br>Sections specifying: The Bridal Bouquet , Head Piece, Toss Bouquet.<br>Unlimited Memo specifying additional Requirements with respect to the Bride. |
| 3 | **Bridal Party** | The Maid Of Honor: Color & Style of Gown, and the Bouquet Section.<br>Bridesmaids: Color & Style of Gown, and the Bouquet Section.<br>The Flower Girl: Color & Style of Gown, and the Bouquet Section.<br>Unlimited Memo specifying additional Requirements with respect to the Bridal Party. |
| 4 | **BoutOnnieres-1** | Specifying the detailed requirements of Boutonnieres for:<br>The Groom, The Best Man, Grooms Men, Bride & Groom Fathers, and Grand Fathers.<br>Unlimited Memo specifying additional Requirements with respect to the Boutonnieres –1 section. |
| 5 | **Boutonnieres-2** | Specifying the detailed requirements of Boutonnieres for:<br>The Ring Bearer, Ushers, and "Other" Boutonnieres.<br>Unlimited Memo specifying additional Requirements with respect to the Boutonnieres –2 section. |
| 6 | **Corsages** | Specifying the detailed requirements of Corsages for:<br>The Bride's Mother(s), the Groom's Mother(s), The Grand Mothers, and "Other" Corsages.<br>Unlimited Memo specifying additional Requirements with respect to the Corsages. |
| 7 | **Chapel-1** | Ceremony Date, Location, Contact, Phone, Delivery Instructions, Setup & Delivery Charge.<br>Specifying the detailed requirements of Decorations for:<br>Free Standing Arrangement, Alter Arrangement, and Pew Decorations. |
| 8 | **Chapel-2** | Specifying the detailed requirements of Decorations for:<br>Candelabra, Entrance Arrangement, Arches, Guest Book, and Other Chapel Decorations.<br>Unlimited Memo specifying additional Requirements with respect to the Chapel Decorations. |
| 9 | **Reception-1** | Reception Date, Location, Contact, Phone, Delivery Instructions, Setup & Delivery Charge.<br>Specifying the detailed requirements of Decorations for:<br>Cake Table Top, Cake Table Center and Cake Table Bottom. |
| 10 | **Reception-2** | Specifying the detailed requirements of Decorations for:<br>Buffet Table, Guest Tables, Brides Table, Balloons, and "Other" Reception Decorations.<br>Unlimited Memo specifying additional Requirements with respect to the Reception Decorations. |
| 11 | **Finish & Calculations** | Sub-Totals, Setup and Delivery Charges Totals, Discount for early sign-up, Deposit, taxes (GST for Canada), Balance and Balance Due Date. Terms of the contract.<br>Unlimited Memo specifying any additional requirements. Print button to Preview and Print the Worksheet. |

## Interface Features

### Customer Database

System maintains a separate Customer Database, where the Event Worksheet's customer can be selected from this Database, or appended to this Database. In case of the Multi-user (Integrated) version, this is indeed the Master MFS Host Customer Database.

### Navigation (selecting worksheets)

You can go from one Worksheet to the next using VCR type (First / Prior / Next / Last) buttons. You can Search and Locate Worksheets using the "Incremental Search" technology by the "Worksheet Name", the "Customer Account_Id", or the "Customer's Last name". You can easily add, delete and undo Worksheets using the Event Worksheet toolbar.

### Color Picker Utility

You can specify colors on the screen using the Color Picker utility providing you with up to 24 million colors (depending on your computer setup and capabilities).

### Inventory Database

You can Setup Inventory Items with their "Bitmap" (picture). The Event Worksheet is shipped with a few sample Bitmaps, but you can easily scan the pictures of your own Inventory items and add them to the Event Worksheet's setup. The system uses the Industry Standard Bitmap format of ".BMP" files, which is easily produced using any scanner software.

Once the Item is selected using the Event Worksheet's Search Engine, the Bitmap is automatically inserted into the Worksheet. You can magnify the Item's Bitmap to cover most of the computer screen, by simply right clicking on the item's picture.

The Inventory Database is setup using the Inventory selection on the VT Administration menu. In case of the Multi-user (Integrated) version, this is indeed the Inventory Database.

### Item Specifications

You can INSERT each Item's Specifications (or Details) into the Item's Description by clicking on the button labeled "+" (for Appends). The "+" button is located at the bottom of each Item's Description, right next to the Qty field.

Please note that you can specify the Specifications (or Details) of each Item on the Inventory Profile form accessed from the Admin menu.

### The Spell Checker

Based on your system configuration, the Event Worksheet can be equipped with the Spell Checker utility. Any item description, notes, or the terms of the proposal can be easily checked for misspelled words, by simply clicking on the "Spell Check" button.

### Frequently Used Addresses

The Event Worksheet provides you with the automatic "Frequently Used Address" insertion. Once you setup this database (using the Setup Manager) , you can quickly insert the Chapel, Church, Funeral Home, or Hotel's address, by simply clicking on the "Freq. Address" button.

The Event Worksheet is available in either the "Standalone-Single user" or the "Integrated - Multi-user" configurations. When upgrading from the "Standalone" mode to the "Multi user" mode, all of your existing data (worksheets) will remain intact.

## Creating a Visual Ticket Order

Once the worksheet is firmed up, and you have finalized the payment information click "Generate Order" to create a Visual Ticket order in the Order Pad.

The system then prompts you to pull up the order. Enter yes, go to Payment window on the order and adjust payment information to reflect the payment arrangement with the customer.

See the following procedure with respect to entering the Deposit amounts.

## Event Worksheet - Events Listing

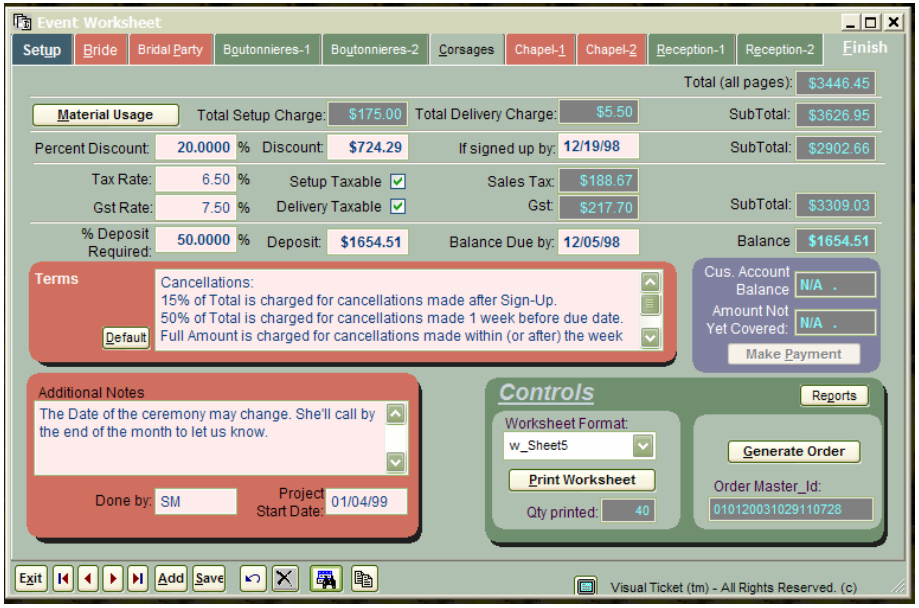
The "Events Listing" is available from the "Report Launcher" under the "Listings" option.

You can also run the Report Launcher with the option to only run the "Events Listing" directly from the Event Worksheet (by clicking the **Print** button on the Toolbar).

In order to better manage your upcoming events, the printing (or previewing) of this listing now allows you to select:

- All Events
- Future Events (the Ceremony Date is scheduled for today or after).
- Pending Events (you have not yet generated the order).
- Processed Events (you have generated the order).

You can further fine tune your Events Filtering by using the "Filter Utility" that follows. For example you can select the **Field** "Name", select the **Operator** "Contains" and enter "copy" for the **Value**, hit the **Activate** button to only list "Future Events" that are "Copy of" other Events.




The "Processed: Master_Id" field each Event on the listing shows the Master_Id of the order that was generated (this field is BLANK for Pending orders).

## How to handle Deposits

- Complete the initial version of the Event Worksheet for the event.
- Add the Bride information to the Customer Database (by clicking on the **Add Customer** button (located at the button of Bride Information area). This adds the Bride to the Customer Database and loads the Customer Profile form. Make any necessary notes regarding the Event and Payment information on Customer's Profile.
- Enter the Deposit as "Payment on Account" (by clicking on the **Payment** button located on the Customer Profile). The Customer balance reflects the Deposits as payments towards future sale, as a Negative number.
- Make changes to the worksheet as you get closer to the Event (wedding, etc.). All additional payments are also entered as "Payment on Account".
- On the day of delivery (or at the time of final payment when the Event Worksheet is pretty much firmed up), click on "**Generate Order**" and then pull up the order.
- Go to Payment window and put the entire amount under "Billed" (to cancel out the accumulated negative Balance for all the deposits). Save the order. If delivery is still in the future, the order becomes a Standby Order.
- On the day on which delivery is due, the Daily agent pulls the order and submits it. Work Ticket and Delivery tickets print. Order is delivered.
- During Server Shutdown order is posted and customer balance is adjusted to zero (deposits offset the order amount).

## Customer Account Connection

### Customer's Current Account Balance.

This field displays "N/A" as long as the Bride (in case of weddings) is not yet in Customer database. Once the customer is added, it will show the "Current Balance" of the in-house account. In case of paying in advance for events (in form of deposits), this field should generally be Negative (you owe the customer, and not visa versa).

### Amount Not Yet Covered

This field takes the Sub-Total for the entire event, and deducts it from Customer's Negative balance, to show how much more the customer needs to pay (in the form of Payment on Account) to cover the cost of the Event.

### The Payment button

To make the job of entering the payment of Deposits easier, this button provides the shortcut to "Payment on Account" directly from the Calculations page. This button is not visible when/if the Work Sheet is not yet ready (or is blank), and is Not Enabled when the Customer Account does not yet exist (of course you can easily add the Bride to the Customer database by clicking the "Add Customer" button on the Setup page.

# Item Recipes

As described in Chapter-9 (Inventory Admin.) you can setup a Recipe List of inventoried items (do not start with an *) for any non-inventoried item (start with an *) by clicking on the Recipe button available on Item's Inventory Profile form.

### Each Item's Recipe

When conducting your Event Consultations, for each item you can click on the little button labeled "R" to access that item's Recipe list. This helps you review the list of the items necessary to BUILD the item. Each item in the Recipe list appears with it's assigned Price and Qty. This allows you to compare the Item's Price compared to the sum of QTY X PRICE of it's components.

## Building the Recipes

The "Inventory" button located at the bottom of the Recipe form opens the Inventory Profile form loaded with the current Recipe Item.

The access to the Inventory Profile form allows you to Build the Recipe, as you go. When you need a new item to be added to the Inventory (to be used in the Recipe), you just click this button, add the Recipe Item to the Inventory. Come back, and add it to the Recipe.

This is especially useful when you are in the Event Worksheet. You can build the Recipes for all the items required for the event, as you conduct your first few consultations. Each time, you can improve the Recipe list by making it more and more accurate.

- You access the Item's Recipe form by clicking the "R" button.
- Then you click the Inventory button to add the required item(s) to the Inventory (remember items without * in their Item_Id).
- Then you come back to the Recipe form and add the items as Recipe items.
- When you are finished with one Recipe, you exit the Recipe form, and continue with the next item you need to discuss for the event.

### The Combined Material Usage List

Once you are finished with the Event Consultation, the combined "Material Usage" report is available for a the entire event (Wedding, Party, Ceremony, etc..) from the Event Worksheet's "Finish" tab by clicking on the "Material Usage" button..

This button allows you to compile the list of Material Usage (based on all the Recipe items used) for the entire event. The combined (PRICE X QTY) of all Recipe items is then compared to the TOTAL (before tax) of the entire Event.

## Printing Worksheets

The Event Worksheet printouts are "User-Modify-able". You can insert the Bitmap of your own Shop's "Logo" directly into the printout. You can also modify the position of, or the font used for each field on the various Printouts (see Print Job setup).

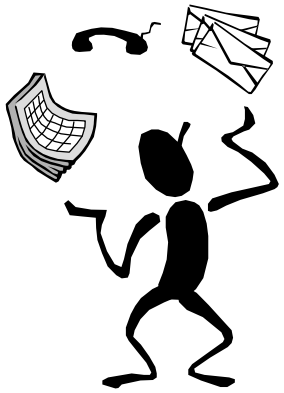
### Pictures ONLY Addendum

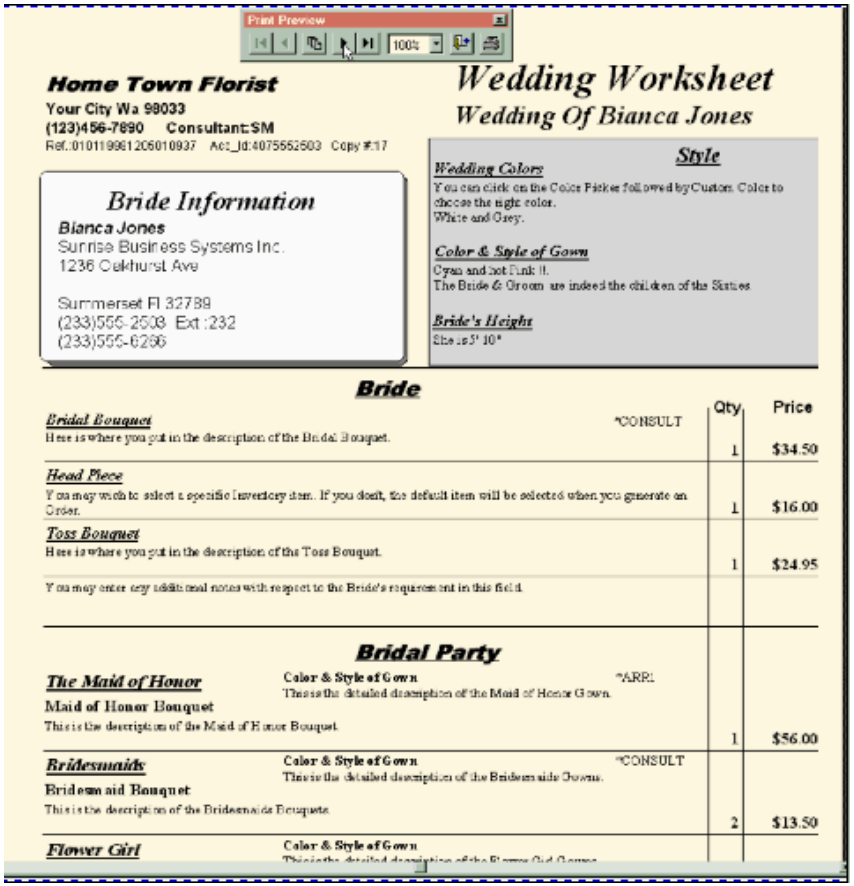
If you use Pictures in your Event Worksheet, this particular template will come real handy as an addendum to the standard template, such that the customer can verify and "Sign off" exactly what was agreed upon. Hopefully this feature can further reduce possible tensions at the time of delivery.

You may print the template w_Sheet5 as the "Picture Only" addendum to the Worksheet. It contains ALL the pictures for the event in a separate 4 page document (including the Price and Qty of each item).

### Single Enlarged Pictures

However, if you still need to print an ENLARGED version of one of the pictures on the Worksheet, simply use the "Right Click" method discussed at the end of Appendix-3.





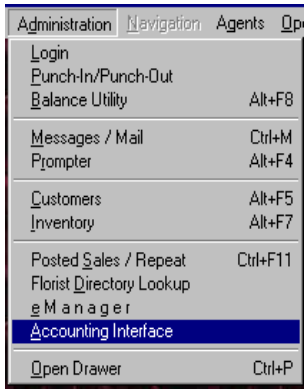
# Chapter 15

**Recommended read for:**

1) System Manager
2) Accountant

# Accounting Interface (AIM)

## Accounting Interface Module (AIM)




The Accounting Interface Module (AIM) provides the means to interface the Visual Ticket with popular Accounting programs such as (Intuit's) QuickBooks and (Microsoft's) Excel.

We acknowledge that Micro Florist's Accounting features (the "Transactions" menu, specifically) does not (and can not) compete with advances made in top of the line "generic" Accounting applications such as QuickBooks Pro (from Intuit Corporation). As you may know, companies such as Intuit, spend millions in R&D every year For a vertical market such as Florist Accounting software, where the number of possible users can not justify such huge investments, it makes a lot more sense to concentrate on the "Vertical Market" aspects of the system and making those features more specialized, easier to use and more advanced, than try to compete in the Accounting features with the likes of QuickBooks Pro.

### What it does

- The AIM's main purpose in life is to capture "Aggregate Accounting Indicators" (we call them "Calculated Fields"), and place them "anywhere" in an output file that can then be picked up (or imported) by these generic Accounting programs such as QuickBooks Pro.
- The AIM-2 (Level-2) goes further than generating "output files". It dynamically links with and posts the "output file" directly into the accounting application (QuickBooks Pro Version 2004 and later).

The keyword in AIM is "anywhere", which means it gives you maximum flexibility in constructing those output files anyway your system requires it. According to one of the beta users "The flexibility of the module gives you lots of options to export the data, any way you need to see it".

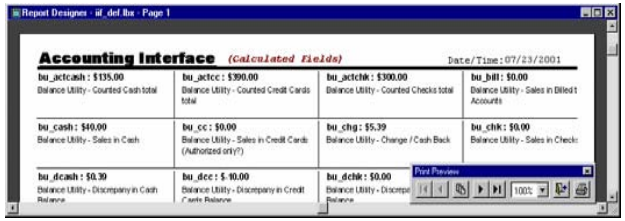
Also when we say "Aggregate Accounting Indicators" we are talking about figures such as total sales, total COGS, Wireout Service Charge, discrepancies in the Balance Utility, and such. So, we are not talking about "individual transactions". Which means, you would still use Visual Ticket (and to a limited extent the Micro Florist) to print reports, reconcile wire service orders, balance Cash Drawers, manage customer database, extract marketing data, and so on.

The "gateway of responsibilities" (or the "handoff protocol") between the two applications (VT/MFS on one hand and the external Generic Accounting Application on the other) maybe defined as follows:

- VT handles POS functions, Order Management/Automation, Operations and operational "Reports", Billing/Receivables, Credit Cards, Wire Reconciliation, IT (information technology) support for Marketing Campaigns, Customer and Inventory Management, and so on.
- Generic Accounting (such as QuickBooks) will handle your Chart of Accounts, Payables (check writing), and taxes.

## AIM Components

### Calculated Fields



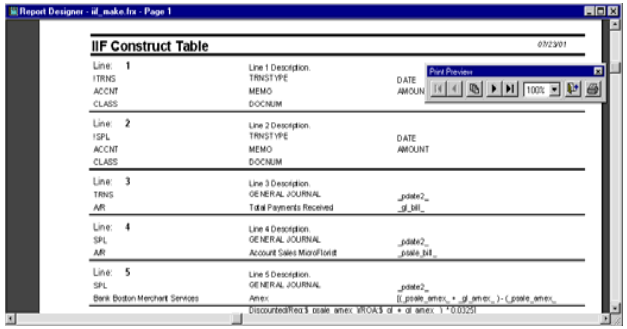

- There are more than 100 calculated fields that are extracted from the daily transactions (entered into the Visual Ticket), during the "Build": process. These fields are "important accounting" numbers that available with their "description" and their "current value" (from the last build process) in a form of a "dropdown" pick list, reports, as well as "output files": When inserting these "Calculated Fields" into the IIF Construct, you can use a combination of them in a "Formula" to extract even more "important accounting" numbers.

## The Build Process

- The Build Process extracts the "Calculated Fields", calculates formulas, and creates the required output files (automatically during Server Shutdown) and places them into the specified target directory (of course in case of AIM-2, the information is posted directly into a specified QuickBooks Company file). The Build process during Server Shutdown is performed immediately after the "Process Agent" posts the results of Visual Ticket Daily Activity into "Posted Database (ie; Micro Florist).
- If you exclude the "Process Agent" from the Server Shutdown (in Nightly Agent setup), the AIM Build process will not run during the Server Shutdown. The reason for this is that AIM's Build Process uses the Posted Sales figures in Posted Database (Micro Florist) to extract more than half of the Calculated Fields.

## Output Files

- Output Files currently consist of Excel, IIF output (for QuickBooks) and a couple "native" FoxPro (.dbf) files. Those output files that are automatically copied to the Target Directory (such as the Excel and QuickBooks's IIF files) have unique names based on the calendar date (The Ending Date of the "Time Period Range"). This insures that they are not over-written by consecutive daily Build processes.




## XLS & XML File output

### Excel Output A & B

- Excel Output - A is a "Historical" type of table and thus a new row is added during each build with about 100 or so columns (one for each Calculated Field). This type of file is ideal for Trend Analysis and Charting. You can build your own (Excel) macros to specify a cell region and calculate Means/Averages, or view/print charts comparing for example; Wire Sales between different wire services, or capture trends in "Billed vs. Credit Card" sales, and so on….
- Excel Output – B is each build's list of Calculated Fields with their "Description" and their "Current Value" extracted for the specific time period. There are 3 columns (Variable name, Description, and Value) and about 100 or so rows, one for each Calculated Field. This file is ideal for import into other (less popular/widespread) accounting programs. Again, you can build (Excel) macros that would extract just the right fields and place them into the columns/rows as is required by your existing Accounting program(s) or even "Corporate IT" (information technology) systems if you are operating under franchise.

### XML file Output

- XML Output – The "XML" file format (file standard) is being widely used as a "Universal Import/Export" file format by some Microsoft Office applications, Business Web applications, and other major Software Company products / services. Consequently the AIM is able to provide "XML Output" (for "Non-Zero Calculated Fields" values) during an AIM build process. –

You can create the XLS (Excel), XML (web/Office) or IIF( QuickBooks) files independent from one another. For example, you may create the XML and the IIF output but not the XLS (or any other combination). Here is the procedure to activate;

To create the XML files, from the AIM module, click on the "Setup" button, then check the box "XML Output". The file is then deposited into the same "Output folder" as the IIF or XLS (Excel) files are deposited (during the BUILD process).

### XML file Upload

Mostly used in Franchisee / Franchisor (Chains) operations where you can UPLOAD the XML file to the Head Quarter's website.

The upload occurs when you click on the Build button, or regularly during Server Shutdown. You can upload to multiple websites or multiple folders on the same website (ie; a backup folder and a main folder).

- The XML file output contains the Calculated Fields imbedded in XML tags.

- The XML file is a Universal format used in most MS Office applications.
- The XML file can be processed (or tallied up for multiple shops) at the Franchisor's Head Quarters office.
- The XML file name uploaded to the HQ's website starts with the shop's Serial (phone) number (accommodating multiple shop uploads).

**Automatic XML Upload Setup**

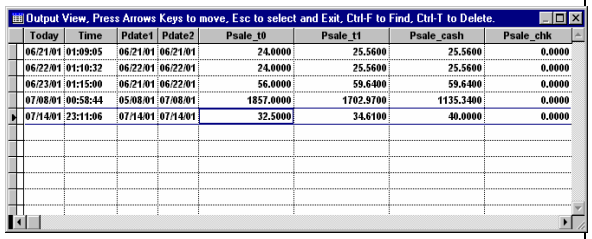
From the AIM form, click on Setup button.

- Check the "Create xml output" and the "Upload ?" checkboxes.
- Click on the "Website" button to add the destination website(s) and folders.
- Enter your website's FTP Parameters for access and upload.
- Exit out of the AIM Setup form (to save the changes).
- Do Build and verify that the "XML file upload" operation was successful.

If there are any problems with the FTP parameter setup, please go back to the AIM Setup form, click on website button and the make necessary changes. Then click on "Test Upload" button to verify access to the website folder.

## IIF Output

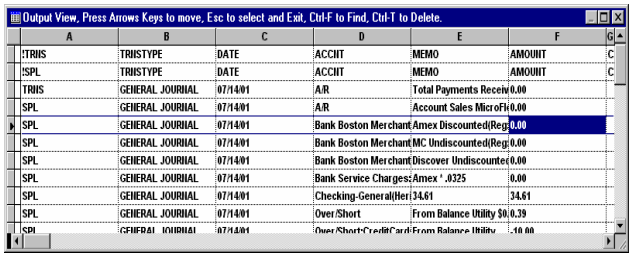
IIF Output is where AIM really shines especially when it comes to "flexibility". IIF stands for "Intuit Interface File". The IIF Editor template (which has the instructions and the formulas to build your specific IIF table) that is shipped with this module is of course built for QuickBooks. But that doesn't mean you can necessarily exclude other Accounting Systems. The IIF output file consists of 26 columns and unlimited number of rows, where you can place any one of 100 or so Calculated Fields (or a combination of them used in formulas) anywhere in this matrix with additional fixed numbers / headers, footers, titles, or whatever else your Accounting System may need, and have AIM calculate the whole thing and place it in the specified target folder. More on this later.




| Today | Time | Pdate1 | Pdate2 | Psale_t0 | Psale_t1 | Psale_cash | Psale_chk |
|---|---|---|---|---|---|---|---|
| 06/21/01 | 01:09:05 | 06/21/01 | 06/21/01 | 24.0000 | 25.5600 | 25.5600 | 0.0000 |
| 06/22/01 | 01:10:32 | 06/22/01 | 06/22/01 | 24.0000 | 25.5600 | 25.5600 | 0.0000 |
| 06/23/01 | 01:15:00 | 06/21/01 | 06/22/01 | 56.0000 | 59.6400 | 59.6400 | 0.0000 |
| 07/08/01 | 00:58:44 | 05/08/01 | 07/08/01 | 1857.0000 | 1702.9700 | 1135.3400 | 0.0000 |
| 07/14/01 | 23:11:06 | 07/14/01 | 07/14/01 | 32.5000 | 34.6100 | 40.0000 | 0.0000 |

Output.dbf is a "Native" FoxPro table. This file is not copied to the target (output) folder, but instead it resides in your local c:\sms\vft\data folder. This (.dbf) table holds the same historical data as the "Excel Output –A" file mentioned above. So the output.dbf table has about 100 or so columns and one row per build. Please note that you can open .dbf tables with Visual Basic and some of the Microsoft Office products directly.

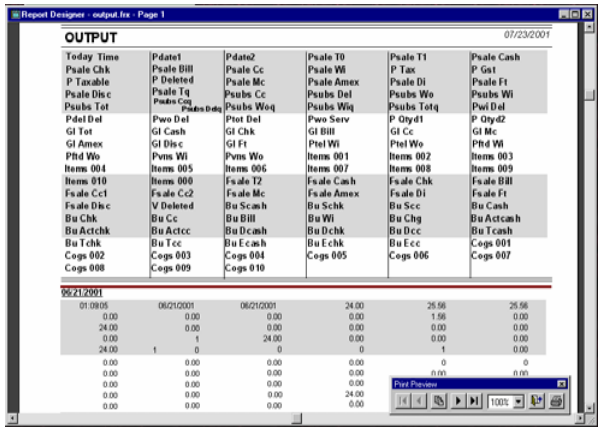
- This is a picture of the Output file displayed in a "Browse" window. Please click on the "Browse" and "Print" buttons located at the bottom of the "Build Utility" to view these features.




| A | B | C | D | E | F |
|---|---|---|---|---|---|
| !TRNS | TRNSTYPE | DATE | ACCNT | MEMO | AMOUNT |
| !SPL | TRNSTYPE | DATE | ACCNT | MEMO | AMOUNT |
| TRNS | GENERAL JOURNAL | 07/14/01 | A/R | Total Payments Receiv | 0.00 |
| SPL | GENERAL JOURNAL | 07/14/01 | A/R | Account Sales MicroFl | 0.00 |
| SPL | GENERAL JOURNAL | 07/14/01 | Bank Boston Merchant | Amex Discounted(Reg | 0.00 |
| SPL | GENERAL JOURNAL | 07/14/01 | Bank Boston Merchant | MC Undiscounted(Reg | 0.00 |
| SPL | GENERAL JOURNAL | 07/14/01 | Bank Boston Merchant | Discover Undiscounte | 0.00 |
| SPL | GENERAL JOURNAL | 07/14/01 | Bank Service Charges | Amex ' .0325 | 0.00 |
| SPL | GENERAL JOURNAL | 07/14/01 | Checking-General(Her | 34.61 | 34.61 |
| SPL | GENERAL JOURNAL | 07/14/01 | Over/Short | From Balance Utility $0. | 0.39 |

- When in a Browse windows, you can press the "Tab" key to navigate up/down/right and left. You can also press Ctrl-F to find, and Ctrl-T to "Delete" a row. You can also adjust the "Column Order" of the output file to better fit your Spreadsheet requirements. See (AIM) Setup section below for details.

This is the Report format of the Output file. All the Calculated Field names are printed only once (to save space and ink) on the Header of the report, followed by each Build's (each row) data on the following pages.




IIF.dbf is another "Native" FoxPro table. This file is not copied to the target output folder either and is available in your local c:\sms\vft\data folder (to be opened by "foreign applications" or specially written "Interface Utilities"). The IIF.dbf table holds the "Results" of the IIF Construct calculations (the Calculated Fields and formulas

merged with all the Fixed strings/numbers). This file is especially handy when it comes to reading your interface figures directly from .DBF file (such as using Visual Basic routines or by Microsoft Office products).

## AIM Automation

Once you have determined which one of the above output file(s) you would be using, the system will insure consistent numbers and an automated interface (as much as possible) to your (generic/external) Accounting System(s). For example, as far as QuickBooks users are concerned, AIM's QuickBooks Interface will create and save all the necessary IIF files (for different days) sitting in the target directory for you to import, every now and then when you feel like catching up with your QuickBooks entries. In other words, it does not force you to be there everyday or train an employee to handle the Accounting Interface duties, when you are not at the shop. That is important (at least to some).

## Data Extraction

- Time Period. When setting the Time Period for each Build process the

[Starting Date/Time] = [Last Build's Date/Time] + 1 Second
[Ending Date/Time] = [Right Now]

- Unless, the "Last Build Date/Time" occurred after the "Last Midnight" (which means that specific build did not contain the entire Day of Transaction data) , in which case the

[Starting Date/Time] = [Last Midnight]
[Ending Date/Time] = [Right Now]

- Starting From Date/Time. As mentioned above, this field is automatically set to be one second after the content of the "Last Build Date/Time" field. However, you can change it to go further back in time, in case you want to extend the time period. You may "double click" this field to rewind the "Starting Date/Time" field by "1 Day". Please note that the system will create a new row of data in the "output" file, regardless of whether or not the time period for this new row, was already covered in the preceding rows. So, in order to get a consistent time interval (from Server Shutdown to Server Shutdown), it is best to leave this process unaltered (not messed with). However, if your accounting requirements someday forces you to recalculate for a prior to the last build (a week, a month, or more), you can specify the extended time period, build the output file, create your Excel or QuickBooks output filers, and then delete the new row that was created in the output table. This will insure that the historical integrity (of the output file) is maintained (in case you want to use the output files for charting/graphs…)
- Add (or not to Add) a new Row ?. The "Output File – A" (the Historical one) mentioned above adds a new row of data, during each Build Process. Again, each row of data contains all the calculated fields for the specified Time Period. Once the row is added and calculated, then information contained in that row is used to generate the IIF and the Excel output files.
- It is important to note that the time period for each row may overlap the time period of preceding rows (since you can rewind the "Starting Date/Time", as well as the "Thru Date/Time" of a given Time Period), so the data contained in each row may not end up being Mutually Exclusive. But, in order to make it easier to have "Mutually Exclusive" Time Periods in the (historical) "Output – A" file, we have implemented the following rules of operation.
- Depending on the "Build Date" contained in the first column of this row, a new row is added to the "Output –A" file, if and only if the last build date (for this row) was Prior to today's date (before last midnight). In other words, the system prevents you from adding multiple rows for the same build date. Which means, you can change the Time Period, rebuild previously covered time periods, create different Excel and QuickBooks output files and so on, but by the "End of the Day" when you run the Server Shutdown, that Day's data is kept in "Today's" row. However, as mentioned above output File Names are based on the "Ending Date" in the Time Period range.

# AIM – Level2

Visual Ticket is proud to present the **AIM-Level-2**, the NEXT GEN state of the art, Dynamic Link to QuickBooks Pro. This development takes Office Automation to the Next Level helping you SAVE (higher pay) Accountant Hours and simplify Visual Ticket's interface to QuickBooks.

- AIM Level-2 (or AIM-2 for short) is presented both as "an addition to AIM", as well as an Integrated single product called "**AIM-Plus**" (which is a bundle of AIM and AIM-2 for shops that are considering getting the Accounting Interface Module for the first time.

## Dynamic Link

The main characteristic of AIM-2 is that it "talks" to QuickBooks via a "Dynamic Link", regardless of whether QuickBooks is currently running on that computer or not. You can specify a "QuickBooks Company file" (with .QBW file extension) for AIM-2 to link to.

From that point forward, the transactions you have specified in your IIF (Intuit Interface Format) will post in "Real Time" and "Automatically" with no need to export individual IIF files, and then having to start QuickBooks and import it. The 10 minutes a day, can add up to a week per year. You may want to consider this a portion of the cost savings resulting form the implementation of AIM-2.

As with the AIM, AIM-2 may also run as part of the Server Shutdown process. Thus fully automating the VT/QB Interface.

- In a Multi-Division company, the AIM-2 running on 2 different stations, each station can post its own Division's Financials, directly into its own corresponding QuickBooks company file.

It is important to note that Intuit (the company that produces QuickBooks) has recently announced that future versions of QuickBooks (starting in 2006 or 2007) will no longer support the "Importing of IIF". If you currently have AIM and are planning to keep up with the future releases of QuickBooks, then you too should consider getting the AIM-Level-2.

## Automating Payroll

AIM-2 also gathers all the "Employee Work Hours" for the specified period (entered via the **Punch In/Punch Out** module), and directly links the "Hours Worked" information directly into the QuickBooks Payroll Module. What this means, is that you can now FULLY AUTOMATE your Payroll, saving you all the time, trouble and especially worries associated with handling payroll day in day out.

There are comprehensive, full-service solutions (called QuickBooks Payroll Service Companies) that help you with everything from running payroll to managing your HR (Human Resources) information. You can just send them the QB payroll information, and they do the rest.

You can rely on guaranteed accurate and timely payroll tax deposits and filings — Some have No-Penalties Guarantee giving you the peace of mind you deserve after a hard days work in the Floral business. You can view paychecks and reports online around the clock — instant, easy access within minutes of transmitting the payroll information.

You can Print paychecks yourself or have one of these Payroll Services deliver them to you. You can choose from multiple standard payroll reports and obtain more insight into your payroll's impact on your bottom line.

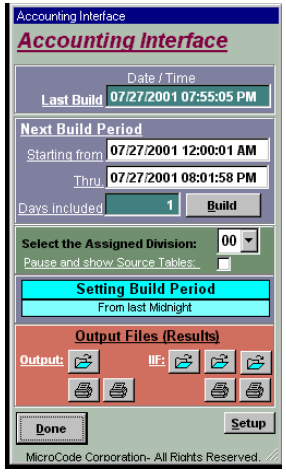
Bottom line, "simplify your human resources" — easily manage employee information and stay in compliance with state and federal regulations Enhance your payroll with add-on HR and Benefit services — save time and make your job easier.

## QuickBooks Pro Preferences

In order for QuickBooks Pro to operate with AIM-2, the following changes need to be made to QuickBooks Setup.

- From QuickBooks **Edit Menu** select **Preferences**.
  - Go to **General** icon, click **Company Preferences** tab and select
    - Show Minutes as Decimal.
  - Go to **External (or Integrated) Applications** icon, click **Company Preferences** tab and select "FLEXQuarters ODBC" **Properties**. Under "Access Rights" tab, enable the following options:
    - Allow to read and modify this company.
    - Allow this application to login automatically.
    - Allow this application to access Social Security Numbers, ...

## How it works




Once you select the Accounting Interface Module from Visual Ticket's "Administration" menu, the form on the right appears.

Once you have setup your "Output File" requirements, and have decided on the "IIF Construct" layout, then you would only be clicking on the "Build" button on this form, and occasionally may view or print the reports that are available on the bottom section of this form.

But, if you have setup to run the "Build Process" as part of the Nightly Agent (during Server Shutdown), then you may only use this form for special requirements. Otherwise, the system will consistently select the "Next Build Period", build the output files and place them into the target folder without any user input/intervention required.

In case of AIM-2, you can also choose to dynamically link AIM with QuickBooks and post the IIF Transactions and the Employee Hours for the Time Period specified directly into a QuickBooks Interactive Session, or to a specified QuickBooks Company file.

The components of the Build Utility are as follows:

- Last Build Date/Time. This is the date/time that the system last ran the Build Process all the way through. This field is non-editable.
- Starting From Date/Time. As mentioned above (under Data Extraction), this field is automatically set to be one second after the content of the "Last Build Date/Time" field. However, you can change it to go further back in time, in case you want to extend the time period. You may "double click" this field to rewind the "Starting Date/Time" field by "1 Day". Please note that the system will create a new row of data in the "output" file, regardless of whether or not the time period for this new row, was already covered in the preceding rows. So, in order to get a consistent time interval (from Server Shutdown to Server Shutdown), it is best to leave this process unaltered (just let the process run during the Nightly Server Shutdowns).
- However, if your accounting requirements someday forces you to recalculate for a prior to the last build (a week, a month, or more), you can specify the extended time period, build the output file, create your Excel or QuickBooks output filers, and then delete the new row that was created in the output table (press Ctrl-T in the "Output Browse": window). This will insure that the historical integrity (of the output file) is maintained (in case you want to use the output files for charting/graphs…).
- Thru Date/Time. Not only you can rewind the "Starting From Date/Time" field for the starting of the Time Period, but you can also adjust the "Thru Date/Time" field to tightly define the Time Period for the next Build Process. This flexibility will allow to rebuild the output files for "specific Time Periods". This date is also used for naming the output files.
- Days Included. This is simply the number of days contained between the "Starting Date/Time" and the "Thru Date/Time" fields. This field is non-editable.
- When posting the IIF transactions and the Employee Work Hours directly into QuickBooks (using the AIM-2), in order to prevent the same transactions being posted twice for the same day, the system records the "Start and End" dates for the last build, and prompts the User to bypass the re-posting the figures for the same Time Period, when/if it applies.

Of course you have to be very careful if you are going against "One Server Shutdown per day" rule, by running the Server Shutdown more than once on the same day, with the Automatic Posting enabled.

This is due to the fact that transactions prior to the first Server Shutdown will get posted during the first Server Shutdown, and then the transactions between the first server shutdown and the second will not.

In this case, it is best to disable the Automatic Posting as part of the Server Shutdown and click the "Post" buttons (located on AIM Setup form) to post the information whenever you're ready (or after the last Server Shutdown).

## Division Filtering

- The Sold Division is the Division that sold the item and Collected the money for it. The Assigned Division is the Division that Filled the order and got credit for it. An Inter-Division Order is an order that is Sold in one Division, and then Assigned to another Division to fill the order.
- This Sold and Assigned dropdown controls allow you to Filter Visual Ticket (Future) and Micro Florist (Posted) Transactions. When you select a Division number from the Dropdown control, the information is saved for future builds.
- If have multiple Divisions, and would like run your daily Builds on a division by division basis, you would need to run the Build Process for each division, separately prior to running the "All Divisions" Build (selecting '00' on both dropdowns) for the entire business.
- In addition to filtering your AIM Builds for a specific Assigned Division, you can also filter for a specific Sold Division. In shops where there are Inter-Division orders, this feature allows you to recognize the revenue based on the Sold (collected the money) vs. the Assigned (filled the order) Division dropdowns.
- In most cases you would be selecting the same Division number for both Sold and Assigned D Divisions, unless you are looking to capture net Inter-Division order transfers.
- The following "Calculated Variables" have to do with "Receiving the money" and thus reflect the "Sold Division" filtering. Others that are not listed below, have to do with Filling the order, and thus are calculated based on the Assigned Division.
- Posted Sales Figures: psale_t0, psale_t1 , psale_tq , psale_cash , psale_chk , psale_bill , psale_cc , psale_wi , p_tax , p_gst, p_taxable , psale_mc , psale_amex , psale_di , psale_ft , psale_chg , psale_disc
- Future Sales Figures: fsale_t2, fsale_cash, fsale_chk, fsale_bill, fsale_cc1, fsale_cc2, fsale_mc, fsale_amex, fsale_di, f_ccdi, fsale_ft, fsale_disc, fsale_chg
- The "Sold Division" filtering does not affect "line item figures" such as item qty, item price, delivery / service charges, etc. You should only use the "Assigned Division" dropdown to filter for these values.

### GL Transactions

When doing a Build with "Division Filtering" enabled, General Ledger Transactions (which include Payment on Account, Cash Outs, Balance Adjustments, and Employee Time entries) are filter as follows;

| Sold Division | Assigned Division | Results |
|---|---|---|
| 00 | 00 | GL Transactions are NOT filtered |
| 02 | 00 | GL Transactions filtered for Division: 02 |
| 00 | 02 | GL Transactions filtered for Division: 02 |
| 01 | 02 | GL Transactions filtered for Division: 02 |

This means that when Assigned division is NOT specified, and the Sold Division is, the AIM extracts GL Transaction for the specified Sold division. Otherwise, the Assigned division always takes precedence.

## The Build Process

- The Build Button. It extracts the Calculates Fields, Calculates the Formulas, and creates the Output files.
- Pause & Show Source Tables. This is a "debugging" tool for you to verify the calculation of the "Calculated Fields" for the time period specified. AIM starts with showing the posted (Micro Florist) Subsale.dbf, Sale.dbf, Deliv.dbf, and Subtran.dbf tables followed by Visual Ticket's vOrder.dbf, and Session_Mgr.dbf tables. These tables open in "Read Only" mode and would allow you to manually add up the values and verify the results of calculations and your formulas.
- In order to provide you with additional help in "Balancing" transactions with totals provided by "Calculated Fields", the system also generates temporary ".xls" files in the Output Folder as follows:

| | |
|---|---|
| Tmp_subs.xls | (posted) SubSale.dbf (subsales) within the Time Period. |
| Tmp_sale.xls | (posted) Sale.dbf (subtransactions) within the Time Period. |
| Tmp_Delv.xls | (posted) Deliv.dbf (deliveries) within the Time Period. |
| Tmp_subt.xls | (posted) SubTran.dbf (subtransactions) within the Time Period. |
| Tmp_vOrd.xls | (Visual Ticket) vOrder.dbf (future orders) entered within Time Period. |

- Output Files (Results). The buttons in this section of the Build Utility either "Browse" (buttons with a folder icon) or "Print" (buttons with printer icon) the Output or the IIF tables / Output files. The details of these facilities are displayed in the "Output Files" section above.
- When viewing any of the Browse windows, please note that you can drag the column boundaries and change the column size. This is especially important when you want to view the contents of a column that is covered by adjacent columns.

## Figures from The Balance Utility

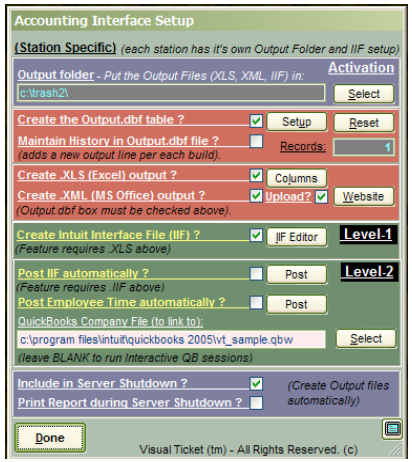
The "Ending Date" of the Time Period specified on the **Balance Utility** is used for import into the AIM. Given the "Ending Date" of the Balance utility falls within the AIM's Build period.

As a result, this feature allows you to control whether or not, the Balance Utility figures are picked up by the AIM.

So If you need to rebuild "Discrepancies" or the "Transfer Outs" amounts for a certain previous date, then this feature allows you to control the date of Importing of these figures into AIM (ie; via the Ending Date).

To confirm that the Balance Utility figures are being picked up by AIM, during a Build, the system now displays a window confirming that the Balance Utility's "Ending Date" is indeed within the Build date period.

## A.I.M. Setup




In order to enter into the Accounting Interface Module (AIM) Setup, please click on the "**Setup**" button located at the bottom of the AIM main form. This will open the form on the right.

- Output Folder. This is the folder that output files generated during the AIM's Build Process are placed in. You may specify a local or a mapped network drive (in case your Accounting program resides on another station/computer). For QuickBooks Pro, you may want to add the "Import" folder underneath "QuickBooks Pro" folder and then consider using the following folder:

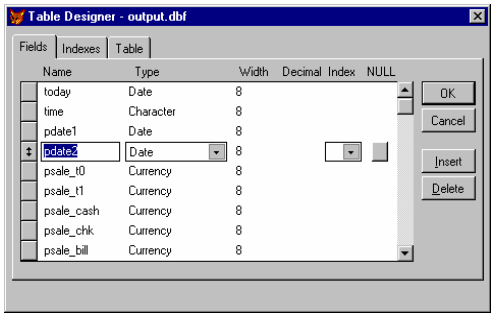
X:\Program Files\Intuit\QuickBooks Pro\import

- Activation Checkboxes. These are mainly toggle switches for enabling/disable individual output files or build processes. Please note that as you go down through these checkboxes, the one above is sometimes a prerequisite for the one below it. In other words, you may not enable "Create .xls output file", if/when the "Create output.dbf" checkbox is not checked.
    - Create Output.dbf. This is main switch for creating the "Output – A" output file during the Build process.
    - Maintain History. If checked, then a new row is added to the "Output – A" table during each Build process as specified above in "**Add (or not Add) a new row**" checkbox. If not checked, then the last (bottom) row is always updated with the data generated during each build process. This switch maybe handy when you are experimenting with different formulas or time periods, and would like to prevent AIM from adding a new rows to the output table for a while, until you are ready. The "Records" field to the right of the checkbox displays the

current number of records (rows) in the output-A table (how much historical data is available).

- Setup Button. This button activate the "Setup Parameters" form for specifying "Item Groupings", "COGS setup" and other parameters needed for extracting the "Calculated Fields". This form is covered in the next section.
- Create .xls (Excel) output. If you are planning to use the .xls output files (either for Excel, Microsoft Office, or any other accounting application that can import .xls type of file), then you should enable this switch. If you are mainly interested in QuickBooks IIF type of output files, and do not wish to get your QuickBooks "Import" folder crowded up with bunch of .xls files that you won't be using, then disable this checkbox.
- Column. Since the "Column Order" of the "output – A" table maybe significant for proper import into Excel or other accounting applications, this button allows you to make the required changes. The column order of the "output-A" file does not have any significance when producing the IIF table for QuickBooks

Once you press on the Columns button, the "Table Designer" dialog box appears. Warning: You may not make any changes to the output.dbf table structure, except for changing the column order. Any other changes (such as Deleting / Inserting / Type changes) will result in errors.




You can change the column order by clicking on the left most column (where the up/down arrow is shown) and by dragging a specific field and moving it up/down you can change the column order. Once you are satisfied with your changes, press the Ok button, otherwise press Cancel. Do not click on Insert or Delete buttons.

## AIM Level-1

- Create IIF Output. If you are interested in generating IIF output files for QuickBooks (or similar Accounting Software that uses IIF type of output file), then you should enable this switch. Otherwise, if importing of your data is done via .xls, xml or .dbf type of files, and do not wish to crowd up the "Output Folder", then you should disable uncheck this. For AIM level-1, the generated IIF file specified here, is then imported in QuickBook's using QB's File menu.
- IIF Editor Button. Here is where you can EDIT (or design) your (QuickBooks) IIF Construct specifications. This subject is covered in details in the following sections.

## AIM Level-2

- Post IIF Automatically. This is where you decide whether or not you want to post the transactions in the IIF automatically via the Dynamic Link to an Interactive QuickBooks session or to a QuickBooks Company file) during the Build process. .Please note, when this box is checked, the Build performed by the Nightly Agent during Server Shutdown will automatically post the IIF transactions.
- Post IIF Button. If you choose NOT TO run the Dynamic Link as part of each Build Process, and you are more comfortable doing the POSTING of IIF Transactions, whenever you choose, then this is the button you would use to do the actual posting of IIF Transactions in real time.
- Post Employee Work Hours Automatically. This is also where you decide whether or not you want to post the Employee Work Hours automatically via the Dynamic Link to an Interactive QuickBooks session or to a QuickBooks Company file) during the Build process. .Please note, when this box is checked, the Build performed by the Nightly Agent during Server Shutdown will automatically post the Employee Work Hours for the day.
- Post Employee Hours Button. If you choose NOT TO run the Dynamic Link as part of each Build Process, and you feel more comfortable doing the POSTING of the Employee Work Hours, whenever you choose, then this is the button you would use to do the actual posting of Employee Work Hours in real time.
- QB Company File. This is where you decide whether or not you want to post the transactions in the IIF and/or the Employee Work Hours directly to a QuickBooks Company File, or post them when QuickBooks is running (via an Interactive QuickBooks Session).

Of course, if you want to save time by not having to start QuickBooks each time, or you want to post the information during Server Shutdown, then you are much better off selecting QuickBooks Company File (these files have the .QBW extension). Otherwise, if you prefer to run QB and check the results in real time, then you should leave the Company File field BLANK.

## Server Shutdown

- Include in Server Shutdown. Once you have fully tested your output files, verified their accuracy, and then tested them again, you are then ready to run the "AIM Build Utility" automatically during the Server Shutdown (via the Nightly Agent). Please note that the "AIM Build" process runs immediately after the "Process Agent". The Process Agent is a prerequisite for the AIM Build Utility, and must already be included in the Nightly Agent setup. If you are copying the output files to another station, please make sure the network is up and the Output folder is accessible.
- Print Report during Server Shutdown. This could be a real handy feature, if you like to have a hard copy of your most important "Financial Indicators" for a given time period. A glance at the information on this Report gives you almost everything you want to know about how the business went while you were not at the shop. Which also, raises "Security Issues" with making this Report available to unauthorized employees, especially while you are not at the shop.

Also, if the IIF is out of balance, the "IIF_Balance" report will automatically print (during Server Shutdown) notifying you to take appropriate corrective action.

### Server Shutdown - Running AIM - Level -2

When running Accounting Interface Module (AIM) Level-2 during "Server Shutdown", you have 1 minute to Cancel the posting of IIF and/or Employee Work Hours, directly to QuickBooks.

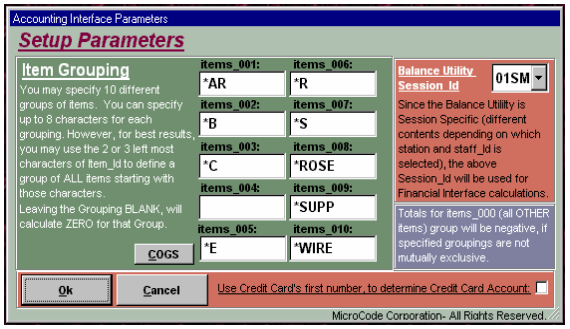
This option comes handy, when (for what ever reason) you need to run Server Shutdown during the day, and you are not yet ready to post AIM Level-2 transactions for that day.

## Setup Parameters

Once you click on the Setup button in the AIM Setup window, the "Setup Parameters" form is opened (on the right).

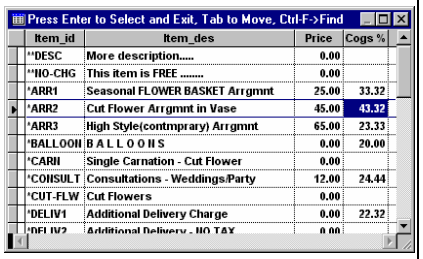
Here is where you specify the "parameters" that are needed to insure that correct data is being extracted during the "Build" process.

The "Setup Parameters" form has the following sections;




- Item Groupings. It is again important to emphasize here that "Logical Assignment of your Item_Ids are critical" in order to obtain good Reports in Micro Florist, as well as good Departmental Sales Breakdown in output files generated via the AIM. Once you have your items setup such that the first 2 or 3 characters of the Item_Id correctly represent the various Revenue Departments at your shop, then you can very easily identify those departments in this form. Leaving the Grouping Field blank will calculate $0.00 for that group. Please note that "item Groupings" only apply to the Items in your (local) Inventory (Catalog or Wireout items are included in these calculation, there is other fields that represent those numbers).
- There are total of 11 available groupings, and the first 10 are calculated based on all items sold with their "left most n characters in their Item_Id' are listed here in the above 10 Grouping fields. The 11th group is represented as "All Else". Which means AIM calculates all the totals for each group, adds them up, and then deducts it from the Total Sales figure. It quickly becomes obvious that the "All Else" grouping only makes sense, if and when, the grouping of the first 10 categories are mutually exclusive (otherwise, you will have a negative number). The totals of these 11 groups are stored in "Calculated Fields" named;
- Items_001, Items_002, Items_003, ..... and Items_010 respectively.
- COGS. The AIM module also calculates COGS (Cost of Goods Sold) for these 10 Grouping and places them into Calculated Fields named;

- Cogs_001, Cogs_002, Cogs_003, ....., and Cogs_010 respectively.
- The beauty of it is that you don't have to select your Item Groupings based on their uniform COGS. Each item in each group is allowed to have it's own COGS percentage. Which means there needs to be a place (or a facility) where you can setup each item's COGS percentage. Well then the COGS button on this form is exactly for that purpose.




| Item_id | Item_des | Price | Cogs % |
|---|---|---|---|
| **DESC | More description..... | 0.00 | |
| **NO-CHG | This item is FREE ..... | 0.00 | |
| *ARR1 | Seasonal FLOWER BASKET Arrgmnt | 25.00 | 33.32 |
| *ARR2 | Cut Flower Arrgmnt in Vase | 45.00 | 43.32 |
| *ARR3 | High Style(contmprary) Arrgmnt | 65.00 | 23.33 |
| *BALLOON | B A L L O O N S | 0.00 | 20.00 |
| *CARN | Single Carnation - Cut Flower | 0.00 | |
| *CONSULT | Consultations - Weddings/Party | 12.00 | 24.44 |
| *CUT-FLW | Cut Flowers | 0.00 | |
| *DELIV1 | Additional Delivery Charge | 0.00 | 22.32 |
| *DELIV2 | Additional Delivery - NO TAX | 0.00 | |

- Once you click on the COGS button you will see a Browse window (as displayed above) that allows you to quickly enter COGS percentages for each item. Then during the Build process the system filters the inventory for each Grouping, calculates each items COGS by multiplying the COGS% and it's the Price and then adding these numbers up to calculate the Grouping's total COGS, which is then assigned it the respective Calculated Field.
- Balance Utility Session_Id. As mentioned before, the AIM also needs to extract a few numbers from the Balance Utility. The list of all the figures that are brought into AIM from the Balance Utility can be viewed in the Calculated Fields Reports and Browse windows. However there are 2 very important points to remember about the numbers coming from the Balance Utility.
- First, only the Balance Utility that is used on a specific station by a specific Staff_Id is imported into the AIM. As you may know, you can have as many Balance Utility (numbers) as you have Session_Ids (Staff_Ids setup on individual stations) on the system. However, the one specific Balance Utility that is selected from this Session_Id Dropdown, will be the Balance Utility that needs to be used on a daily basis (otherwise Balance Utility numbers will not get into AIM's calculated Fields).
- The second point is that the AIM will only import Balance Utility numbers, if the Balance Utility was actually used (at least once) during the specified Time Period. How would the system know that? Every time you click on the "Update" button (on the Balance Utility) the system registers the Date/Time of that action. If you are not seeing the numbers you expect to see, click on the "Pause and Show Source Table" checkbox, wait for the last table (which is the Session_Mgr table), go to the last field, and check the Date/Time in the Bal_Upd field. Then make sure the Session_Id is listed on this table and the Date/Time falls within the Build Period.
- Use Credit Card First Number. There are two ways to calculate totals for various Credit Card types (Master Card, Visa, Amex, Discover and FTD Cash Flow). If you don't check this checkbox, the system will use the "Account" dropdown in the Payment form to determine which Credit Card type was used on each order. In this mode, you can have FTD Cash Flow that includes all of the 4 types of credit card under the same account, while you can still enter another sale with !MC account specified exclusively.
- But when you check this checkbox, you are telling the system to forget about the (Credit Card) account that was specified in the Account dropdown (on the payment form), and just use the "1 Digit Test" to determine the type of credit card instead. In this case, 3 is for American Express, 4 and 5 are for Visa/Master Card, and 6 is for Discover card.

## COGS% vs. Ave. Cost

From the Inventory Profile form, click on the "Costs" button and the system provides you with the following two options to assign COST for items. Entering a non-zero value on the COGS% column instructs the system to ignore the Ave_Cost column for that item.

- Variable COGS% (Cost of Goods percentage of Price). In this case: Item Cost = Selling Price X COGS%.
- Which means the Item Cost is dependant on the Selling price.
- Fixed Ave_Cost. Which is the actual Average Cost of the item you have paid for (regardless of what you end up selling for).

Here is an example: You purchase the item *FRUIT for $50. You can specify COGS = 50% and set the Price of $100, or you can leave the COGS column blank (zero) and instead specify Ave_Cost of $50.

# QuickBooks Interface

## The Road Map

- Accountant's Debits/Credits Table. Print the Calculated Variables report and give it to your Accountant. Ask him/her to put together the "Credits/Debit" table that s/he wants to be posted into QuickBooks on each day.
- The Debits/Credits Table is a list of figures posted to each account (in your chart-of-accounts). The line of the table has the account's name and the formulas for either Credit/Debit on a piece of paper (using the Calculated Variable list). .
- Compare the Debits/Credits table with the sample IIF. Make the necessary adjustments to the accounts and formulas in the IIF so that the final version of IIF would do exactly what the "Credits/Debits" table is supposed to do.
- Test. Do a Build for single day. Compare the "IIF Output" with the "actual" figures calculated on the Accountant's Debit/Credit table for the same day. Make the necessary adjustments to IIF so that the figures are identical to the Debit/Credit table above.
- Balance.. Make sure the IIF is in balance, and then import it into QuickBooks.

## What is an IIF ?

IIF stands for "Intuit Interchange Format" which is a standard designed and published by the Intuit Corporation for communication between various 3rd Part applications such as Visual Ticket and QuickBooks.

Please note that, we at Visual Ticket Development, have had absolutely nothing to do with the structure, the implementation and the methodology of the IIF. The IIF is the gateway into QuickBooks, designed by Intuit. So, if you don't like the way it is structured, you need to write to Intuit. We can't make changes/enhancements to the IIF structure, like we can with all the other Visual Ticket features.

To learn the IIF structure, one must know "Accounting" and understand the principals of QuickBooks operations. All we are doing here in this section, is to provide you with the means to further edit your IIF and mainly to automate it (not to create it)

You can create your preliminary IIF by simply using Windows Notepad (or Wordpad). Add the first few lines of IIF rows, using your GL Accounts, the figures to be Debited/Credited, to those accounts, and the necessary comments, according to the IIF Rules.

That is all it takes to create an IIF. Once your IIF is working, you can use the "Calculated Variables Report" to manually enter the new Daily figures into this preliminary IIF, save it, and import it into QuickBooks (so you don't have to manually post each transaction in QB).

Once you have created the IIF at this level, and are able to manually enter the figures for a few days, then you can bring it into Visual Ticket's IIF Editor and automate the whole thing in just a few minutes.

You can find detailed information on IIF and how it works from the following sources:

- QuickBooks Help files. Once you are in QuickBooks activate the Help utility and search for IIF.
- QuickBooks Website. While in your Internet browser go to:

  http://www.quickbooks.com
- Use the Search field on this website and search for "IIF".

According to Intuit, an .IIF file is a tab-delimited or comma-delimited text file, based on the Intuit Interchange Format, used to import and export data in QuickBooks. In a tab-delimited text file, tabs separate the data fields. The table below is an example of a Chart of Accounts import file using a **tab-delimited** format:

| !ACCNT | NAME | ACCNTTYPE | DESC |
|---|---|---|---|
| ACCNT | Checking | BANK | First Bank |
| ACCNT | Sales | INC | Sales Income |

In a comma-delimited text file, commas separated the data fields. Below is the same Chart of Accounts import file using a comma-delimited format:

```
!ACCNT,NAME,ACCNTTYPE,DESC
ACCNT,Checking,BANK,First Bank
ACCNT,Sales,INC,Sales Income
```

Note: In a comma-delimited format, when a comma is not a separator, include the information in quotations. (Example: "Tucson, AZ").

However, what ever the technical requirements for an creating IIF files is, the Accounting Interface Module (AIM) handles all those requirements and generates the file according to those specifications. All you need to do, is to decide which set of "Calculated Fields" you want to include in the IIF file.

The form you see on the right is provides the means for you to create and fine tune your IIF file, so that the right information is gathered and posted into QuickBooks.

Once you learn about how IIFs are constructed, you'll find out that IIF is just a table with columns and rows. The standard calls for a row of "Field Headers" and then each row (line) starts off with the keyword that specifies the data that you will be placing into that line. Once you setup the IIF table, all the "fixed" fields (required by QuickBooks) remain constant and the only things that change (during each Build) is the "Calculated Fields" that have placed into appropriate cells of the IIF table.

## Chart of Accounts

If you are a `novice user` and would like to use the generic template that comes with Visual Ticket's QuickBooks Interface, then you really wouldn't have to change much. Just review the cells of the IIF table and make the necessary changes to multipliers and formulas that are specific to your business (such as Credit Card fees or Wire commissions and so forth). The generic "IIF Construct" that is shipped with Visual Ticket's QuickBooks Interface will provide you with more than adequate (or according to a Beta User; "good looking") Balance Sheet and P&L statement.

If you are planning to use the generic IIF table, you should look at the "`Chart of Accounts.xls`" file that is located in the `x:\utils` folder on the MFS/VT CD. You can also always download the latest version of this file from

http://www.FloristSoftware.com/ftp/Chart of Accounts.xls

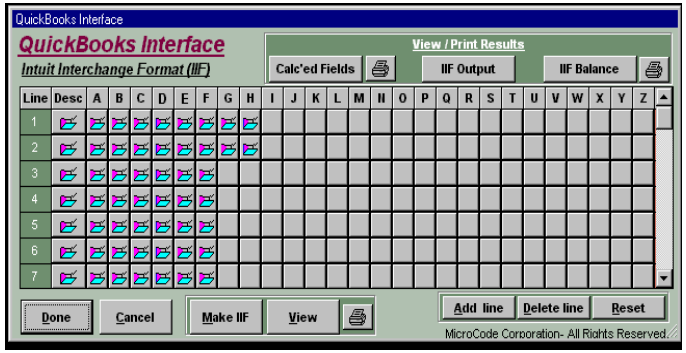
When setting up the `Chart of Accounts` in QuickBooks, the exact spelling of the account names is important. You would need to enter in all the accounts and account types, as specified in the .xls file above.

If you are just beginning to use QuickBooks (and have not yet setup your Chart of Accounts), there is even an easier solution. You can simply import the "`QuickBooks Company Setup`" samples files; "`Sample1.qbw`", or "`Sample2.qbw`" into QuickBooks to (automatically) setup the right Chart of Accounts. Sample1 is sets up a simpler Chart of Accounts with about 300+ accounts, while Sample2 has "Sub-Department" accounts with 900+ accounts. Once you have imported one of these files, your QuickBooks is ready to receive the generic IIF. This file is also available on the CD, as well as on the website specific above.

NOTE `The Sample.qbw files setup your QuickBooks to use the Generic IIF, right out of the box!`

## Designing your IIF

The `IIF Editor` (as shown here) provides the means to access the IIF table. This table has up to 26 rows (A thru Z) with unlimited number of rows (lines). In the IIF table provided as Factory Setup (Generic IIF), we have used 46 rows (lines).




You can press on any of the table "Cell Buttons" to access the contents of the cell and edit it's contents. The cell that are `not empty`, have the "Filled Folder" icon on them. This way you can quickly identify which cell are used and which are empty.

When you ready to start designing your own (or fine tuning the generic) IIF, you should always update your Visual Ticket software and click on the "`Reset`" button (on the lower right corner of this form) to "load" the latest version of the (Generic) IIF that we have come up with, to date.

Once you click on one of the "Cell Buttons" on the grid, the "IIF Editor" form is activated. The title of this form tells you which Cell is being edited such as:

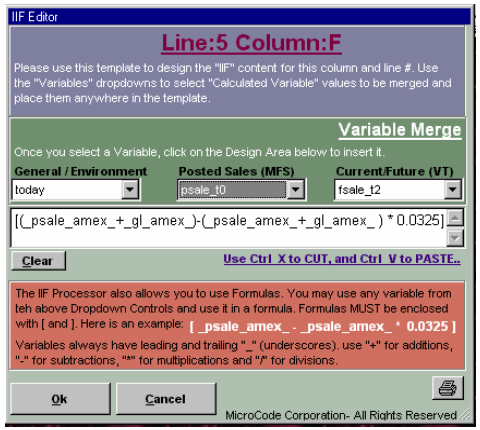
Line: 5 Column F.

For the "Headers" and "Keywords" (first column of each line) required by QuickBooks, you simply enter those characters into the Edit area of the IIF Editor.

The significance of the IIF Editor becomes evident when you are at a specific cell where you want to insert a "Calculated Field".

A "Calculated Field" is the name of a variable that Visual Ticket recognizes and each time it performs the AIM's Build Process, it calculates those fields (for the time period specified) and plugs their corresponding value directly into the IIF (output file) at that exact location in the IIF table.

In order to facilitate the "Calculated Field" insertion into the IIF Table, the IIF Editor has 3 dropdown controls. These dropdown controls display the name, the description and the current value of each Calculated Field. The first dropdown contains all "General" or Environmental variables such as dates and time. The second dropdown contains Calculated Fields that come from posted sales into the Micro Florist (after the Process Agent posts those values into Micro Florist's Accounting system. The 3rd dropdown control allows selection from Calculated Fields that are still in Visual Ticket (not yet posted into Micro Florist), such as Future orders.




In order to use the automatic insertion of Calculated Fields, you place the cursor where you want to insert the variable, and then click on one the Dropdowns and select the Calculated Field. The system will place the variable into the Edit Area. It is important that you don't alter the Variable's name such as the leading and the trailing "_" (underscore) character.

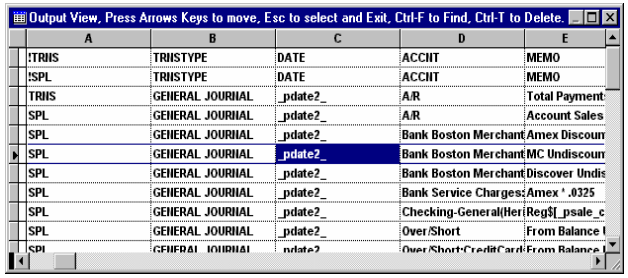
You can also construct Formulas using multiple Calculated Fields and mathematical operators. The standard for using mathematical operators are as follows:

| | |
|---|---|
| + | Plus |
| - | Minus |
| * | Multiplication |
| / | Division |

Also, when using formulas, you must use a "[" to start a formula and "]" to end it. Here is an example for calculating the net amount posted into the American Express account.

```
[( _psale_amex_ + gl_amex_ ) - ( _psale_amex_ +_gl_amex_ ) * 0.0325 ]
```

Also, when using prentices, you must make sure that number of "open prentices" match the "close prentices". In the example above, we are adding up total "Posted Sales" charged to American Express with "Total Paid On Accounts" charged to American Express, minus the same total amount multiplied by the 0.035 (American Express Fee).




Once you have used the IIF Editor a few times and have become familiar with the variable names and formula construction, you are ready to use the shortcut (allows you to make multiple changes at once while in the same window).

To do this, click on the "View" button at the bottom of the IIF Construct form. The Browse window display above will open. First drag the Column Boundaries as necessary. Then use the arrow keys to navigate through this table and make the necessary changes.

## Testing the IIF

Now that you have created your own IIF, or have made the necessary changes to the generic (Factory Setting) IIF, you are ready to test it. The first thing we want to do is to make sure that the variable names and the formulas have the right syntax (adhere to the rules mentioned above). The testing would be more effective, if we have used the system within the (Build) time period, and thus have transaction data available.

To extract the data (Calculated Fields) and generate the Output file, press the Build button that is located on the "AIM Build Utility" (the Build button is inactive in Demo mode). The "Make IIF" button that is located on the "IIF Construct" form uses the Calculated Fields already calculated (last paragraph) and makes the IIF table (does not recalculate the Calculated Fields).

To view the Calculated Fields (that will be used to generate the IIF output), click on the "Calculated Fields" button. You can also enter your own "test numbers" into the "Calculated Fields" table, to make it easier to track them when they get to the IIF.

**NOTE** If you are running the "Demo Version" of QBI, you can manually enter specific numbers into the Output Table (Calc'd Fields), then click on the "Make IIF" button to calculate and test your IIF (to try it out, before you order).

Now click on the "Make IIF" Button located at the bottom of the IIF Construct form. The system "compiles" the IIF Construct and generates the IIF output file. If the system finds an incomplete formula or a syntax problem it will prompt you to correct it. Once done, the system prompts you to view the output file. You may also click on the "IIF Output" button to view the output file at anytime.

When browsing the "IIF Output" file, look at the results of the Calculated Fields and the formulas. If you see a variable name or a formula, where a number is supposed to be, it means that there is a problem with the variable name or the formula. Fix the problem and retry the "Build". Continue this process until correct numbers are inserted into their corresponding cells.

Now you are ready to generate the "IIF Output" and import it into QuickBooks for further tests. Once the "IIF Output" is copied into the Target Directory, start "QuickBooks", go File menu, select Utility and then "Import" the IIF file. The IIF file name is "Date Coded" and you should look for a file "yymmddDyySxx..iif", where yy is the current Year, mm is the Month, dd is Today, yy is the Division number and xx is the Station number.

If you wish to further simplify the generic IIF Construct (factory settings), the one thing you can consolidate is not to track sales, COGS, and inventory by department, but just lump it all together by using the "items_010" and "cogs_010" fields (and leaving all "Item Grouping Specifications" blank).

### Recreating IIF for past data

The "Make IIF" button on this form uses the "Current Row" in the Output file (Calculated Field) to generate the IIF/XLS output files. SO, you can click on the "Calculated Fields" button, select a specific row (a data range in the past), and then click on "Make IIF". This will re-create the IIF/XLS output files for that Time Period and the file names will be based on the pDate2 (the Ending date) field.

## Balancing the IIF

When running QuickBooks Interface and creating IIF output files, the important point you need to keep in mind is that the IIF's Debits/Credits must be in Balance. Otherwise, QuickBooks will refuse to accept it.

Press Enter to Select and Exit, Tab to Move, Ctrl-F->Find

| Account | Debit | Credit |
|---|---|---|
| Wire Income:Wire-Out 20% Commissions | 84.8000 | 0.0000 |
| Wire Income:Wire-Out Service Charge | 30.0000 | 0.0000 |
| Wire-Out:FTD | 284.8000 | 0.0000 |
| Wire-Out:Tel | 54.4000 | 0.0000 |
| Wire Expenses:Wire-In Commissions | 0.0000 | 70.0000 |
| Wire-In:FTD | 0.0000 | 160.0000 |
| Wire-In:Tel | 0.0000 | 120.0000 |
| Delivery Charge Revenue | 108.5000 | 0.0000 |
| ========== Totals: | 4362.8700 | 2950.0800 |
| ========== Discrepancy: | 0.0000 | -1.4500 |

Please note that here too, Visual Ticket's QuickBooks Interface comes to your rescue. You can always view (or print) the "IIF Balance" results by clicking on the "IIF Balance" Browse/Print buttons that are available on both the "IIF Build" utility" as well as the "IIF Construct" utility.

As mentioned in "AIM Setup" section above, once the "Print Report During Server Shutdown" checkbox is enabled, the "IIF Balance" report will automatically print, if and when the IIF is out of balance.

Please note if there is overage/shortage (discrepancy) in Credit Cards for the day, the Balance Utility does not know which specific credit card type to apply this difference to. So, the sample IIF simply books it as a separate entry into the credit card bank account. After you import the IIF into QuickBooks, you can adjust the General Journal entry for the credit difference to $0.00.and manually add it to the proper credit card deposit.

If you are having a "Balancing" problem, the first place you should look is the "Discrepancy" figures coming from the "Balance Utility". You can print the IIF Balance report, check the numbers and then make the necessary adjustments in Visual Ticket.

The Calculated Fields that carry the Balance Utility figures only do so, if/when the Build is for "Today" and then they are taken from the Balance Utility running on the Session_Id (Station + Staff_Id) of the station that is specified in the AIM Setup (01SM is the default).

If you are doing a Build for a previous day, and still need to include certain Discrepancy (or Adjustment) amount, in order for the IIF to Balance, you may wish follow the steps below;

- Do a Build for the time period required (ignore the IIF for this Build). Click on the Setup button, and go to the "IIF Editor" and click on the Calculated Fields button. The last line of the browse window contains the information created during this latest Build..
- Go to the column that contains the Calculated Field in question (bu_dCash, bu_dChk, ..). Enter the number, close the window, and click on the "Make IIF" button. AIM will then create the IIF based on the "Modified" version of the Calculated Fields.
- Using this method, you can actually Balance any IIF !!

### IIF Out-Of-Balance ?

In situations where the IIF is Out of Balance (either due to Rounding issues or incomplete IIF formulas), the AIM now allows you to make the necessary adjustments to the Calculated Variables and Rebuild the IIF one time per build.

After such adjustments are made, ff the IIF is still out of balance, then the AIM will show the details as to the amount that is in discrepancy.

With this feature, you have a chance to make one sets of adjustments per build directly on the AIM Main form, without having to go to the "IIF Editor" page to perform the same functions.

## Verifications

As mentioned in the "AIM Build Utility", you should use the "Pause and show Source Tables" checkbox to verify each calculation and all formula substitutions.

➢

This "Verification Process" is a requirement. You may want to start with a slow day first, check the detailed figures in these tables one by one, and manually add up the numbers, independent of the figures placed in the output files. Then verify your own calculation with the numbers in the output files. Also the ability to view the source data for the time period specified, allows you to use your "existing" accounting methods/procedures to be verify the accuracy of the AIM's output files.

Once individual calculations and formulas are checked and checked again, we strongly recommend that you run the Accounting Interface Module's (AIM) results in parallel with your existing accounting system for an entire quarter (90 days) to insure the information imported into your Accounting system via IIF or XLS output files achieve the exact same results (or better).

In order to run the QuickBooks Interface (QBI) smoothly, it takes more than just fine tuning the IIF. It does require that you follow a routine of "Best Practices". It is necessary to consistently run the final Balance Utility of the day, under the same station and Staff_Id, inventory items must be set up with the proper first digits (if you want departmental grouping), the bank deposits need to be made the same way every day and you can't just add in random checks, you have to make a separate deposit.

# Chapter 16

**Recommended read for:**

1) The Manager

# Planning

## Overview

One of the most important area Visual Ticket can help you plan ahead and in the process be more efficient and save money, is in the area of PLANNING.

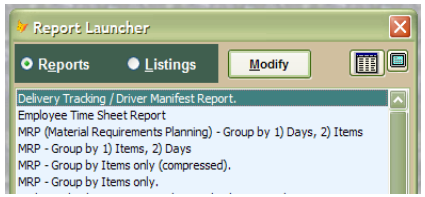
Planning in the Retain Shop environment consists of;

- Planning for the MATERIAL you need (Material Requirement Planning or PLANNING for short) for the next few days.
- Planning for the resources you need both in Shop Staff (Designers and Order Takers) as well as necessary Delivery Resources such as Vans and Drivers. This is especially important for the feast and famine nature of the business environment of Retail Florists, to make sure you can get it just right.
- Planning for the Longer Term business expansion based on Revenue Trends.

It is absolutely critical to insure that you have just enough flowers, designers, drivers, and vans to handle your Mothers Day or Valentine's Day traffic. Visual Ticket can help you in each one of the above areas, as follows;

## Planning (for Material Requirements)

As we discussed on the "Balancing & Reports" chapter, the Report Launcher offers 4 different PLANNING Reports.




Each one of these PLANNING Reports allows you to look at the required material for your Future (Standby) orders for each day, sorted by individual items. Take a copy to the Wholesaler and your set for the upcoming holiday.

Again, contrary to most people's first impression, you don't have to extend the Standby Parameter to gain visibility on your Future (Standby) orders. You just need to print the right PLANNING Report.

## Resource Planning

- The term "Shop Loading" refers to the break down of "Sales in each hour of each day (of the week)".
  - For example, knowing that your business picks up between 3:00pm to 7:00pm on Fridays and Thursdays, but it is flat on Monday and Tuesday afternoons helps you schedule your shops staff accordingly. For Shop Loading Analysis see "Shop Loading" discussed in Charts Power Modules # 7 below.
- Number of Deliveries (both Local vs. Wireout) made during each day of the week for the last Mother's Day season, can give you a pretty good idea where you may end up this year.
  - You can see the Sales Trends chart and figure out the percent improvement (or God forbid, decline), and then use it to extrapolate the "Qty of Local Deliveries" for this year. Use your judgment and experience (since a computer can never know about the new shop opening across the street) and carefully use these figures to rent trucks and hire your drivers.
- The trend in Qty of NEW customers, versus the Qty of Deliveries made can reveal important planning criteria.
  - If the two are somewhat equal, it means you are mainly selling to New customers, which is great because you are gaining Market Share, but it also means that you need to work on a marketing campaign to get more business out of your existing customer base (eManager and Email Power Module can help a great deal).
  - The Local vs. Wire-out Delivery chart indicates important trends on whether the shop is moving more towards becoming an "Order Gatherer" operation or becoming more of a Filling Florist with efficient and highly skilled Production facilities.
  - The combination of the 3 charts (new customers, local delivery, wire-out deliveries) can reveal trends on whether new customers are ordering more out of town orders versus local deliveries.

## Revenue Goals

The Visual Charts Module (see Power Module #7 below) helps you keep track of your year over year revenue trends (see 5 Year Performance below) for longer term trends..

The Chart Agent on the other hand is designed to provide a Quick Status Check, on how you are doing TODAY as compared to the Recent history. So that you and your staff can celebrate when meeting and of course beat previous bench marks, and try harder when you don't. Especially handy for setting goals and letting everybody participate in the effort.

# Visual Charts (Power Module #7)

The Visual Charts module is a features specifically designed to give the Manager / Owner the extra edge and the insight into those important business indicators that can make the difference between a thriving and successful enterprise vs. a business that is losing momentum and is becoming less competitive.

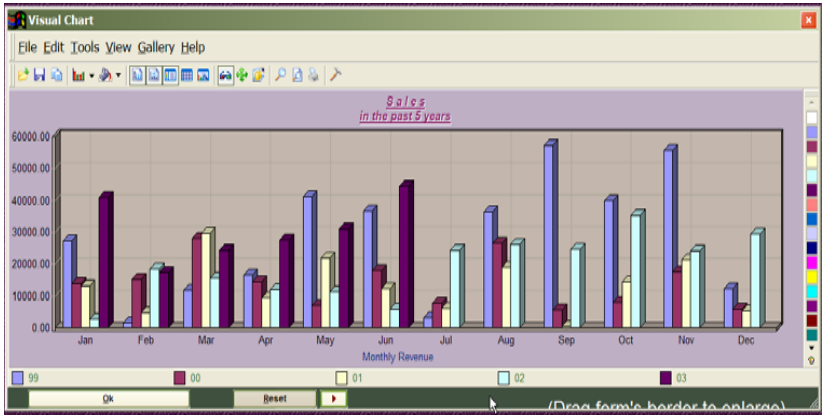
Visual Chart uses a powerful ActiveX Chart components that provides amazing functionality through it's own Menu and Toolbar. The integration of the ActiveX Chart Engine into various Power Modules and the Chart Agent employs extensive and complex code to perform the necessary data retrieval and set chart attributes.

NOTE "Visual Chart Module" is organized and made available under the "Power Modules" feature set.

## Customers & Deliveries

From the Administration menu, select Power Modules, select Charts, and click on the Chart button on the "New Customers & Deliveries" section.

- Charts the "Qty of NEW customers added" for the time period specified. A good Indicator of gaining/losing Market Share. Customers selected MUST have had a purchase to be counted (not just added for Mailing List purposes).
- Charts the "Qty of Local Deliveries" (as opposed to wire-out orders) for the time period specified. A great tool for planning your Driver requirements for an upcoming busy holiday.
- Charts the Qty of Wireout Deliveries (as opposed to Local) for the time period specified. The comparisons between the quantity of Local versus Wireout orders can reveal important trends in you business, or the demographics of your customer base.
- All of the Above. The combination of the three charts (New Customers, Local Deliveries, and Wire-out Deliveries all superimposed, can reveal trends in:
  - Delivering to New customers vs. Existing Customers". Which can point to either, a) Gaining Market Share, or b) Marketing to your existing Customer Base.
  - Whether your new customers are ordering more out of town orders versus local delivery orders.



Each chart allows you to specify whether you want the chart to be presented based on "Daily" vs. "Weekly" grouping of the data. When selecting "Weekly" option, the weeks start on the "Day of the Week" you have specified for the "Low Date" in the Time Interval.

The Weekly chart is best suited for monitoring Business Trends, while the Daily chart is best suited for Holiday Planning.

## How to use the Chart Module

Here is an example of the chart in Power Module 8 (Sales in last 5 Years). As you can see, the default chart is using a 3D Bar Chart that is printed at the end of June 2003 (purple bar).

The first thing you want to do when looking at the Visual Chart, is to drag the right border of Chart Window as long as your screen allows. Then for better visual effects, you can click on each color or the Color Bar (located in the right side if the window) and then drag and drop it into the different areas of the chart. Thus, you can change the outside background, the inside background and each of group of bars' colors.

The Visual Chart's Menu allows you to Save charts in various Graphics formats, reload a saved chart, Print Preview (or Print) the chart, copy to Clip Board (so that you can import it into Word, Excel, etc.), change the fonts, remove/add Legends, view the chart in 2D or 3D perspectives, and change the "z-Clustered" (under View menu) to view the chart in Clustered fashion.

Use the Chart "Properties" (under the View menu) to change the Effects, the Colors, whether the chart is "Stacked" (vs. individual bars), the Axis Style, adding or removing "Grid Lines", change the Chart Title, change the properties of each Series (data groups), as well as changing the Rotation and the Depth of the 3D perspective.

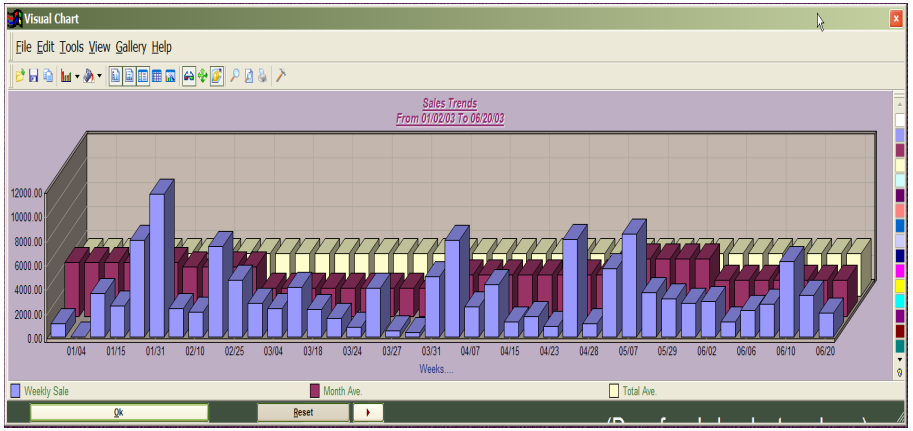
You can select a different type of chart from the "Gallery" menu to see the data in an entirely different perspective. For example, selecting the Doughnut Chart allows you to see the breakdown of each year's revenue for each month.

Another very important feature of the Visual Chart is the ability to actually change the chart interactively. For example, you can drag a portion of a Pie chart (or a Doughnut chart) out of the circle, or change the size of a certain bar to conduct "What if ?" analysis.

To alter the size of a certain bar (in the default Bar Chart), place you mouse on the tip of one of the bars and drag it up/down. You will notice the cross hair shows the amount, and if you have placed your mouse at the right place, the size of the bar changes to accommodate your "What If ?" scenario. You can also select "Data Editor" from the tools menu and alter the figures directly.

The "Reset" button, recaptures the chart Data and reset the chart to it's original (default) state. The "Scroll" button (at the bottom of the chart) makes the X-Axis Scrollable, in order to reduce clutter for charts with high density X-Axis data points.

## Sales Terns / Load Analysis




The Sales Trend / Load Analysis Power Module is a powerful Management tool for Performance Measurement and Resource Allocation. This Power Module extracts data from the "Posted Sales" database for a specified Time Period, and then by processing, reducing and organizing the information, it presents the Sales Trends and Weekly Load tables, in both Reports as well as in Excel Spreadsheet for charting and further analysis.

So, if you are interested in extracting the Hourly Load Analysis, then you need to schedule the Processing Agent to run at least once an hour (instead of running only at the end of the day)..

- The checkbox for Calculating Averages allows you to calculate "Average over fixed number of days" (7 days per week, and 30 days per month), versus

"Average over the number of days your shop was open". The default is the "Calculate averages during the open days".

## Sales Trends

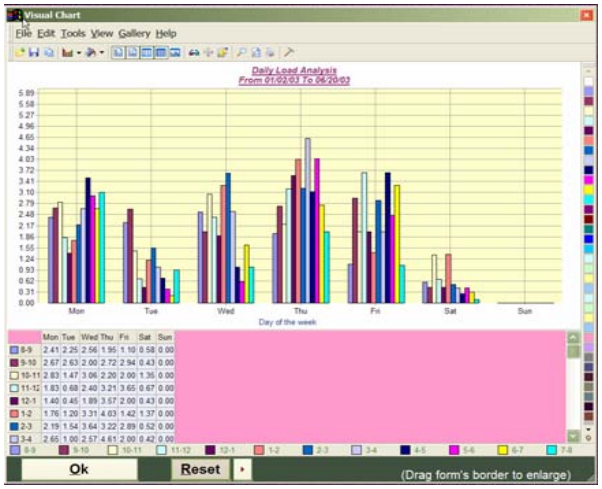
This table is intended mainly for "Charting" purposes and spreadsheet analysis. It provides you with a vertical table that lists;

- Year, Month, Day numbers, plus the "Day of the Week' spelled out, and finally "Sales on each day".
- Week Number (within the Timer Period) and the Weekly Average.
- Overall Average for the entire Time Period. Monthly Average.

As you can see, the columns contain all the information necessary to chart Sales Performance over the time axis. It also provides a quick and easy way to lookup sales for a given day and compare that to the various averages.

## Load Analysis

The second table contains "Days of the Week" and the "open" store hours of between 8:00am and 8:00pm (20:00). It presents the % of sales for each hour of each day (Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, and Sunday. Allowing you to adjust your Staffing Requirements and other Resources based on Historical data. Table fields include:




- Day of the Week Number (1: Monday, 2: Tuesday, etc.…)
- Average Sale for each "Day of the Week" for the Time Period specified.
- %Sale (percent of total sale) for each "Day of the Week".
- Higher / Lower than Daily Average for each "Day of the Week" indicator.
- %Sale (percent of total sale) for each "Hour of the Day".

You can obtain a loading report of the second week in May of last year, and then decide how best to schedule the staffing requirements for the upcoming Mother's Day. For example on the sample chart, Wednesday around noon would be the busiest time of the week.

## 5 or 10 Year Performance

The Power Module charts your important Business Indicators for the Last 5 Years. The figures are actually retrieved from the Posted Transactions Period Totals table.

So, before you chart these important indicators the Power Module provides the option to update "Period Totals" (before charting them).

Once prompted to do so, select "Yes" and the "Period Totals" utility appears and counts down 10 seconds before updating the figures (you may stop the Count Down and tag any specific period for recalculation of the totals).

The "***10 Year charts***" are best suited for the Visual Ticket "Old Timers" who have 10 years worth of HISTORY to chart.

The "***5 Year charts***" go back only 1,2,3,4, or 5 years depending on how long you have been using the Visual Ticket.

This option allows you to chart the "Monthly Trends" going back 10 years (or 5 year respectively).

Now that you have updated the Period Totals, you may go ahead and click on the "Charts" button and select "Sales" from the menu to see your Monthly Sales for each year of the past 5 years. Obviously, the other charts (ie; COGS, Expenses, Misc. Income and Profit) would do not apply, if you are not using Micro Florist for your accounting (since most customers use the Account Interface Module to perform their accounting on QuickBooks, Excel, …). But, never-the-less it is the Sales Figures (for each month, during the last 5 or 10 years) that is indeed the most important indicator of operations.

## The Chart Agent

The Chart Agent is a management tool to obtain a snapshot of Today's Revenue. The Chart Agent window can be setup to be always visible, and the chart is automatically updated (based on Agent's "Repeat" Period). You may also use the Chart Agent for promoting employee participation in shop's Sales/Marketing, by setting Daily Revenue Goals and employee bonus criteria.

The Chart Agent (like any other Agent) can be setup to run on any station (depending on whether you like to keep this information private, you can set the Agent to run on your own station at the office),

The Chart Agent belongs to the "Power Module" feature set. You may activate the Chart Agent on your screen's foreground as a "screen saver", when not using the order pad.

The Chart displays Today sales, and compares that to; the Day Before (Day B4) sales, The Week Before (8 days before yesterday) sales, the Month Before (30 days before last week)) sales, and the 2 Months Before (60 days before last month) sales.

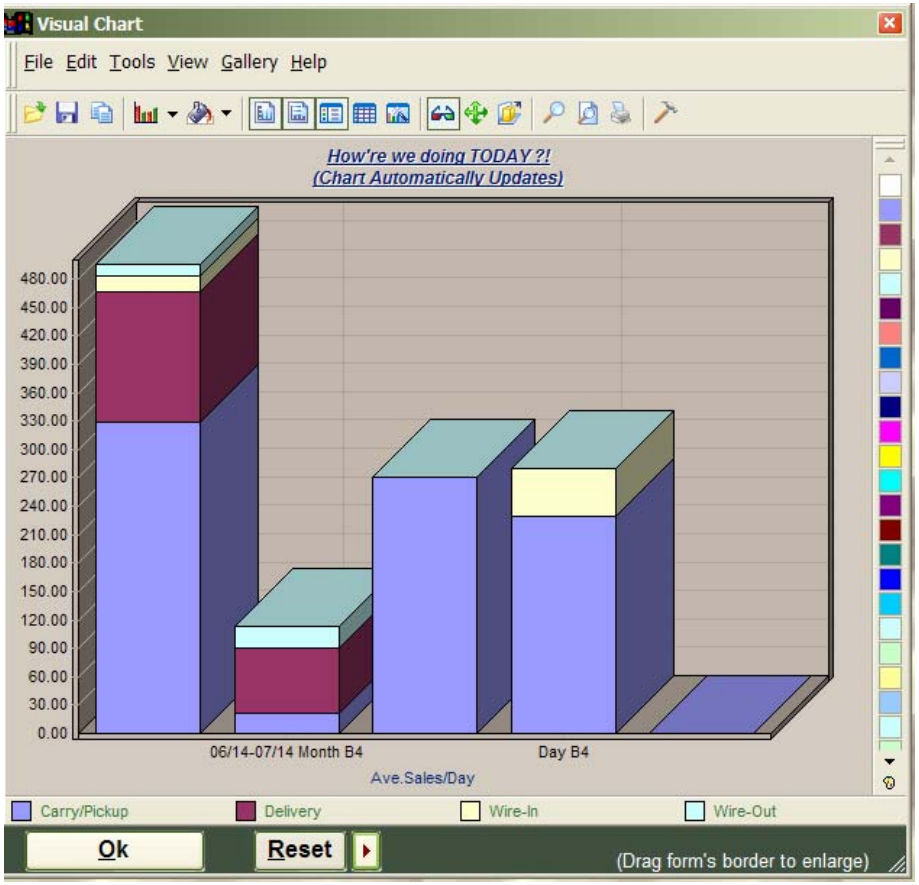
Each bar shows the daily average (which is the total sale for the period, divided over the number of days shop was actually open).

Each time period is mutually exclusive (do not overlap). The sales figures appear as "Stacked Bar Chart" where each bar shows the Line Item Sales Types of Carry, Delivery, Wireout and Wire-In for that time period (see color coding below the chart).

If you prefer, you can change these settings from the "Setup" button located next to the Chart button on the Agent Launcher (in Agents menu).

Please see "Using the Chart Module" section above to find out all the different ways you can enlarge the chart, change it's colors, change chart type, etc., etc.

Please note that if you need to pause the chart (from being updated) so that you can print or export it, you need to Close the Chart window (by clicking OK), Pause the Agent (by clicking on "Pause" button, and then forcing the chart the redraw, by clicking the Force button. Now you can work on the chart, without interruptions due to the Automatic Chart Updates.



## Chart Agent Operations

The Chart Agent now shows THREE alternating charts, each chart witha completely different sets of data.

- The first chart is a "Short Term / Real Time" view of the orders in the Order Pad, while
- The second chart provides a "Longer term Month to Date" (MTD) view of your Shop's Sales Performance for each year of the last 5 years..
- The third charts shows a "Longer term Year to Date" (or YTD) view of your Shop's Sales Performance for each year of the last 5 years..

Each chart also alternates between the "Stacked" and "Non-Stacked" configurations.

### Stacked vs. Non-Stacked

The Stacked configuration allows you to see the Carry, Delivery, Wire-In and Wire-out components in their aggregate form, while the non-stacked configuration allows you to compare each individual sales type (such as Delivery) against the same sales type for another year, and so on.

### The First Chart

The first chart shows the DAILY SALES progress in "REAL TIME" as new orders are entered in the Order Pad (ie, it uses Order Pad database). It compares today's sale (so far) against the historical Daily Averages of following past periods:

- Today's Average (so far) versus
- The Day Before Average versus,
- The Week Before Average, versus
- The Month Before Average, and finally
- The 2 month period before that.

### The Second Chart

The 2nd chart on the other hand uses the "Posted Sales database" and show the "Total of Posted Sales" going back 5 years. Each bar shows the TOTAL dollar amount of Carry, Delivery, Wire-In and Wire-Out sales from the beginning of the "month" until today (MTD.

For example, assuming today is November 10th. The 2nd chart sums up the total sales from Nov. 1st thru Nov. 10th (today, for a total of 10 days), dividing up the total by Carry, Delivery, Wire in and Wire-out sales.

The next bar shows the totals for "same period the year before", then the year before that, and so on, as follows (on November 10th):

- Nov.1st thru Nov 10th, 2001.
- Nov.1st thru Nov 10th, 2002.
- Nov.1st thru Nov 10th, 2003.
- Nov.1st thru Nov 10th, 2004.
- Nov.1st thru Nov 10th, 2005.

As a result, on the last day of the month, you will be comparing November's totals for the past 5 years. Of course, you can make this Long Term chart to also show "Real Time" results, by scheduling the Processing Agent to run thru-out the day.

### The Third Chart

- The 3rd chart looks at even a longer term sales performance charting the Year to Date (YTD) sales figures from:

- Jan 1st thru Nov 10th, 2001.
- Jan.1st thru Nov 10th, 2002.
- Jan.1st thru Nov 10th, 2003.
- Jan.1st thru Nov 10th, 2004.
- Jan.1st thru Nov 10th, 2005.

Due to the seasonality nature of the Retail Florist and Gift/Basket business, comparing the same Calendar period for each year makes much more sense and produces more accurate results.

If you have not ran the Chart Agent lately, now is a good time to go to the Agent Launcher and check it out.

If you need to STOP the Chart Agent's Timer (so that you can use the Chart menu to select different Chart Types, or to Print the chart, etc), click on red X button to CLOSE the Chart window.

Then put the Chart Agent on PAUSE mode (by clicking the Pause button), and then Force the Agent (by clicking on Force button) as necessary to go thru the different charts one by one, giving you the chance to take your time and manipulate (or print) the chart as needed.

# Chapter -17

**Required read for:**

1) System Manager

## System Manager

**Overview**

These are System Management topics, options, and suggestions that the System Manager should be aware of and implement as time goes on.

### Downloading updates

The Latest version of the Visual Ticket system is always available on Visual Ticket's FTP site on the Internet. Since the download is performed using the Internet, the connection and download will not cost you any long distance or connect charges. In order to initiate the download, you must have an Internet connection on one of the systems on your LAN (Local Area Network).

Access to Visual Ticket 's Internet FTP site, is provided based on your Technical Support membership plan. In order to view your existing technical Support extensions, or to sign up for the "Standard Support", please access the Technical Support page (available in Setup Manager). Once you have insured that Internet FTP access is indeed available, you are ready to start the download.

If you are not already connected to the Internet via DSL/Cable, you need to startup your Dialup Networking for Internet Connection. Start VT and go to the Main menu. Select the Setup menu, and click on the Setup Manager.

To obtain the latest step-by-step procedure for performing the necessary downloads, please click on Tech Support "Access" button. Then click on the "View" button. This will access the PDF file located at:

http://www.visualticket.com/ftp/updates.pdf

If you have installed the Adobe Acrobat Reader, the 2-3 page procedure is loaded and displayed.

Please go to the File menu on Adobe Acrobat, and print the procedure for your future reference.

Since the Update procedure may change from time to time, you would need print a fresh copy of this procedure, every quarter or so.

### Visual Ticket News

We continue to place the highest priority in continuing R&D, providing our customers with the best we can offer. The new features are introduced to existing Visual Ticket Users via the "Visual Ticket News". We also communicate with Users regarding important changes that are required in Visual Ticket setup, to accommodate some of these new features, as well as informing you about possible Bug Fixes or other enhancements.

Upon doing a "Visual Ticket Update", the system will automatically prompt the User to view the "News". You can also access the "News" by going to the "Help" menu, and selecting the "Visual Ticket News" selection.

The "VT News Utility" is organized with the "Implementation Date" column and the "Description" area. As you move the cursor up and down in the "Date" column, the Description field changes to reflect the corresponding news.

You can search for a specific topic, by clicking on the "Search" button, and the system will search the entire content of the News, from that date forward. You can also print the contents of the Visual Ticket news, from a certain date forward, by clicking on the Print button.

### Security Considerations

If you are concerned with operators deleting orders (or not saving them) and pocking the money you should consider the following options;

- As mentioned in "Monitor Agent" (see Visual Ticket Setup Appendix). You need to setup minimum of 2 sessions per station.
  - High Level Access #4 ( for Managers).
  - Low Level Access # 1 or #2 (for Operators & Staff).
- Turn QuickCash Automation ON for both the QuickCash as well as the Main order pads (in the Order Entry tab of Session Defaults) for the Higher Risk sessions. This will make sure orders are SAVED after Payment form automatically.
- As a higher level security implementation, you may consider turning ON the "Background Save" option in the "System" tab of the Session Defaults. This will insure each order is saved and saved again, before Combined form, Payment form, … are accessed. This will remove the option to Undo an order.
- See Deleted Orders at the end of Chapter -1.

# Paid Services Options

All Paid Services provide you with a Master toggle switch that lets you turn the service ON or OFF via their respective Activate checkbox. When you click on the "Activate" checkbox for these modules, the current rates and the fee structure is displayed in a dialog box and must be accepted by you, before the accessory is activated. Gateway fees are subject to change, with a 30 day prior notice.

As mentioned in Chapter 1, when a "Paid Service" module is activated, the Quarterly Support Sign-ups are changed to Monthly Support Sign-ups, with one third of the amount due. This is due to the fact that Gateway fees are charged on a monthly basis, and due to Cash Flow and collection issues we too have to use the same Pay Cycle as the Gateway providers. The system automatically prompts you few days in advance, allowing you to sign up for support right after you login.

## Credit Card Processing Options

Visual Ticket currently offers two completely different means of process Credit Card transactions. The first method, is one of the latest additions to Visual Ticket product line utilizing the Internet to obtain Credit Card authorizations directly on each station (in about 3-5 seconds, hence the name "Instant Approval tm"). Using this method, it is recommended that you have fast internet connection for your Local Area Network via Cable/DSL.

The second method uses an accessory called the Flora-Credit Server tm working in conjunction with ICVerify to obtain Credit Card Authorization centrally, using telephone dialup. In this mode, each station sends a "request" file to the Flora-Credit Server, the Flora Credit Server queues up the requests, hands them off to the ICVerify Engine, the ICVerify dials up the bank, obtains the response, hands it off to the Flora-Credit Server, and the Flora-Credit sends the "answer" file back to the corresponding station. Using this method, you would need the Flora Credit Server module, Multi-User ICVerify, a dedicated phone line, and it would take somewhere between 20 to 50 seconds to obtain the approval.

### Instant Approval options

The Instant Approval module is one of the most sophisticated and advanced modules in the Visual Ticket feature set, yet the entire complexity of the product is hidden under the hood, so to speak, making it one of the easiest modules to setup.

But before we are ready to proceed with the setup of Instant Approval, you need to provide us with the email address of the person in the Bank (or Credit Card Processor) that handles your Merchant Account. We need to obtain the necessary "Gateway Setup Parameters" from him/her. The necessary parameters for various processors are displayed in the table below. These parameters include fields such as Terminal ID, Store#, Bin#, and so forth (almost the same parameters one requires to setup the ZON terminal for ICVerify).

Once we obtain the necessary parameters from your bank/processor, we can setup the Instant Approval Gateway for your shop and email you the "Gateway Access Parameters" such as; User Id, Password, etc., you see in the window on the right. We will also email the updated step by step procedure at that time.

The following table displays;

- The Processor. This is the network your Merchant Account Provider uses to process your credit cards thru. For example, if you setup your Merchant Account with "Bank of America", then you will need to ask them to send us the Vital (or Visa Net) parameters, since they utilize the Vital processor. FTD and Teleflora still use the good old Global NDC. Payment Processing (PPI) uses Vital, and so forth.
- Required Parameters. Shows the lost of parameters we need to setup the Gateway Account for each Processor..
- The Gateway. Shows which Gateways support each Processor.

| PROCESSING NETWORK NAME | REQUIRED INFORMATION | Supported by these Gateways |
|---|---|---|
| CARDNET (CES/First Data/FDMS) | Cardnet Merchant Number, Cardnet Termid (Terminal ID) | iTransact |
| FIRST DATA - OMAHA (FDR7/ETC7/FDMS Type 7) | Merchant Number (12, 15 or 16 digits), Device ID (Optional) | USAePay<br>iTransact |

| | | |
|---|---|---|
| PAYMENTECH (Gensar) | Client Number (ISO # or Bank #), Merchant Number, Terminal Number **(Must be terminal-based.)** | iTransact |
| NDC - Atlanta East Platform (GLOBALGPS/CNET) | Bank ID, Terminal ID, Settlement Type **(Must be terminal-based.)** | iTransact |
| NOVA | BIN Number, Terminal ID **Nova Setup Information:** Settlement Type: MANUAL (not Auto) VAR: PaymentClearing | iTransact |
| VITAL (Visanet) | Merchant Name, City, State, Zip, Customer Service Phone, Time Zone, Merchant Number (12 digits), Bank ID Number / BIN (6 digits), Terminal Number (4 digits), Store Number (4 digits), Agent Number (6 digits), Chain Number (6 digits), Merchant Category / SIC Code (4 digits) | USAePay iTransact |
| CONCORD EFSnet | Store ID (32 characters max), Store Key (64 characters) | iTransact |
| Lynk Systems | Setup by Lynk. | Lynk Systems |

## Current Status of Gateways

At the time of this writing, here is how we can describe each processor and the trade off involved. Currently the Paid Service setup fee and transaction cost are the same regardless of which gateway is used (however, Paid Service fees are subject to change).

### USAePay Gateway

USAePay is our favorite gateway by far.

- The Gateway is fast (3-5 seconds).
- It offers Batches. This means you can cleanup the batch before you Settle it, so that operator mistakes don't show up on customer statement. You can close a batch at anytime and start a new one for the next day. Great for when you want to close and balance for today, and then start tomorrow's orders in another batch. The Automatic Settlement will insure the batch will close, even if you forget to close it.
- It is friendly. You can setup your preferences on which screen show load as you login (which we recommend the Current Batch listing). The reports are great looking and comprehensive.
- The only limitation, as you can see on the table, is that they support Vital and First Data processors. Which means, at this point in time, you can use it, if your Merchant Account is carried by FTD and Teleflora.

### iTransact Gateway

- They support almost all the Processors listed on the table.
- The speed varies with the Processor. Vital and First Data process around 8-9 seconds. As a result if your Merchant Account runs on these processors, we will automatically set you up on USAePay.
- Since we use iTransact mainly for supporting FTD and Teleflora Merchant Accounts, the processing time for NDC Global used to be around 30 seconds. They used to access the Processor Servers via stacks of modems. Lately using VPN technology, the speeds have improved and is currently around 10-15 seconds. Not exactly "Instant", but within an acceptable range. Future improvements are in works.
- The website leaves a lot to be desired, when compared to USAePay. Currently the website is in BLACK and batches settle automatically during the night. You can't force a settlement. The reporting features could use a little improvement.

### Lynk Systems

- This is a proprietary gateway. Meaning they only support their own Processor. So, to be on Lynk Systems Gateway, they must carry your Merchant Account. They claim to offer very competitive Merchant Account rates/commissions.
- Lynk Systems currently does not offer Batches. As soon as you process a Credit Card, the transaction settles at the same time. This eliminates one whole step, but with it, the ability to clean up a batch (Modify/Void transactions) before it is closed.

### Card Present Transactions:

All SWIPED Credit Cards from your Walk-In sales are referred to as "Card Present Transactions". These transactions should contain the "Magnetic" data programmed into the Track1 and the Track2 on swiped Credit Cards.

Card Present Transactions usually have LOWER credit card commission rate, on certain processors, such as Vital.

But, the lower commission rate is not always automatic. It depends on how your account is setup both on the Merchant Account level (ie Vital) as well as the Gateway (such as USAePay) level.

NOTE It is recommended that you check your Credit Card statements (especially right after switching to Instant Approval) to insure that Card Present Transactions (swiped cards) are being registered as such and the commission charged is indeed accurate for walk-in customers.

## User Defined Templates / Reports

As mentioned above, Visual Ticket templates are User modify-able. However, the current version of Visual FoxPro (provided by Microsoft) does not allow the Runtime version to create new report templates. In order to extensively modify templates /reports, you need to purchase the FoxPro System. Please contact Microsoft sales or your local computer dealer.

Visual Ticket allows you to make minor modifications to existing templates/reports, which may include moving fields and labels around, changing font sizes, and attributes, and most importantly embed Printer Specific functionality into the Report/Template (such as using a specific Paper Tray). Please note that this is an "advanced" feature, that should be used by a "Computer Literate" individual, with care.

In order to use the **Template Editor** currently available in Visual Ticket, click on the "Modify" button, that is available on the Print Job Setup screen for the Visual Format. This will launch the Template Editor's startup screen. Click on the "Modify:" button to modify the report name that is listed on this dialog box. You will now see the specified template in the "Design Mode". Here are a few tips:

- Click on a field to select it. You will see the "handles" around the selected object.
- You may "drag and Drop" the item into a new location.
- You may change the Font attributes of the selected object, by selecting "Font" from the menu.
- You may change the margins by selecting "Page Setup" from the File menu.
- You may select specific Printer Functionality (Paper Tray Selection) by choosing "Printer Setup" from the above "Page Setup" dialog.
- You can force the [First Letter of Each Word To be Capital] by using the PROPER(text) function. For example, in order to make the text for the Enclosure Card proper, right click on the card message, go to "Properties" and change the Expression to PROPER(vCard.Card_msg).
- You can also center the Card message, as well. While you are in the "Properties" section of the Card message (above paragraph), click on the button in front of the "Format" field (the button has 3 dots on it), uncheck "Left Justify", and then check "Center Justify".
- Once you have may all the desired changes to the template, use the File menu to save the template.
- From the File Menu, select "Close" to terminate the Template Editor, and return to Visual Ticket. The system will now prompt "Remove Printer Attributes ?". Select "Yes", if you want to maintain the template as a Generic template not attached internally to a specific printer. Select "No" if you want to keep the new Printer specific setup embedded in the template (such as paper tray selection, or orientation).

In order to prevent the Update Utility to over write the modified templates, you must first use the "Copy" button to save the existing template as a "User Defined" template. User Defined templates have an additional "U" in front of their names. User Defined templates are saved in the c:\sms\vft\reports\Ureports folder automatically.

You should first copy the standard template as a User Defined template, before you attempt to modify it. This way, if you messed up the template during the modify operations, you can always go back to the original one, and recopy it as User Defined. If somehow you messed up a standard template, don't worry, just reinstall the latest Visual Ticket Update.

Here are some basic instructions for adding (or extensively modifying) reports/templates using the Visual FoxPro Development system:

Once you have installed FoxPro Enterprise Edition on your system, you can actually modify the templates (available in the c:\sms\vft\reports folder). However, as mentioned above, all reports and templates that are located in the Reports folder will be over-written whenever you install the latest version of the Visual Ticket system.

- Start Visual FoxPro.
- From the file menu, select Open. Select Reports.
- Select the template/report -> c:\sms\vft\reports\template_name
- FoxPro opens up the Report Designer. Make changes as necessary.
- Select the file menu, use "Save As", and save the report in the Ureports template, with a "U" added to the front of the name.

Please note that by having the FoxPro System you can generate all kinds of different reports/templates, especially Custom reports for special requirements of your business.

### "Custom" User Defined Templates

When using Terminal Server (TS) technology to network Remote locations on Virtual Private Networks (VPNs), there is often the need to have multiple User Defined Templates (UDT) that are customized for each location (Assigned Division) for Drawer settings, shop operations, etc.

For example, if divisions 1, 2, 3, 4, 5, and 6 each need to have theirs own User Defined Template (UDT), then for a certain print job that has only 3 templates (which would provide maximum of 3 UDT position available), you would run out of names after the 3rd division, and would not be able to assign the 6 different UDTs that are necessary.

Now with the introduction of "Custom" User Defined Templates (CUDT), you can save your required templates as Ue_card8a, Ue_card8b, Ue_card8c, Ue_card8d, Ue_card8e, and Ue_card8f. We strongly recommend that you stick with this naming convention (where you put the letters; a, b, c, d, .... after the name of the UDT).

Since each template in Visual Ticket has 2 files associated with it (the .FRX and .FRT), then you need to insure that for the above 6 CUDTs, you have all 12 files sitting in the c:\sms\vft\Reports\UReports folder and are ready to be assigned.

In order to assign the Custom User Defined Templates (CUDT) names, the Visual Ticket allows you to simply "type in" the name of the CUDT into the Report Dropdown control. Once you do that, then you will notice that for the Custom UDT, the Template description indicates "Custom User Defined ....".

## Programming Keyboards

### A QuickCash Automation Application

- Here's a letter from a Visual Ticket user who runs a multi-shop multi-station operation via Terminal Services (thin client) implementation.

Hi Michael,

I just wanted to let you know that the QuickCash Automation update you did (allowing the automation to be used on the full size order pad) is working out really great. I have had the chance to really use it at our new store and I love it. I am using a keyboard that has 12 programmable keys (above the function keys) that I have all the most popular keyboard shortcuts and macros programmed into. I have tendering keys as follows:

| | |
|---|---|
| alt+P | Cash payment with curser in amount paid field |
| alt+P, alt+2, tab, tab | Check Payment with curser in check number field |
| alt+p, alt+3 | Billed payment |
| alt+p, alt+4 | Credit card payment |

The nice thing is the shortcuts work no matter where you are.... in the order pad, combined form, or even if you are already in the payment window. I also have a programmed key for alt+N to process "keyed-in" credit cards and one for alt+A to accept the payment, print the receipt, open the drawer and save the order. Of course the other nine programmable keys open new orders, save forms etc.

Another nice feature that I found accidentally is if you set the print jobs to print rec2 (Cashier Receipt Print job) for both the credit card slip and cashier receipt, VT will print one slip when the card is approved and the second copy when the payment is accepted....this allows us to use single ply receipt paper. The store help like it very much, as you can easily tell the card is approved by the sound of the printer. The customer can sign the first one as the second is printing out for them to take with them. This way we don't have to buy the expensive 2 ply paper, and we don't have two part of a receipt for cash and check payment.

The best part is the reduced steps in your automation and the consistency in the payment forms for both the QuickCash and the Main order pad.
This may all sound like tweaked stuff to you, but believe me this is huge when it comes to training and implementation.

Thank You, very Much!
John S. Miller, Jr.

This letter highlights the importance of QuickCash Automation for higher traffic shops. As you can see below, John has augmented the existing QuickCash Automation with an extra layer of automation using "Programmable Keyboards" to achieve a "Single Keystroke" level of simplicity for many order entry tasks. You can purchase your own Programmable Keyboards and program them to fit your operations.

### Micro Florist from ANY station.

You are provided access to the Micro Florist System (MFS) from any Visual Ticket station) by going to the Setup menu selecting "Micro Florist", based on the following conditions:

- Employee Access level of 4 with the Master Password required (to access the sensitive information / functions in the Micro Florist).
- Since the Micro Florist is licensed to run ONLY on the Visual Ticket Server, this additional access is granted only within the Tech Support subscription period as "the compliments" of Visual Ticket Support Team (mainly because it simplifies Micro Florist printing to remote printers and as such facilitates certain support calls).

- This feature requires Micro Florist Release 04/21/04 or later.
- This feature is also operational under Terminal Services (TS) configurations.

## Routine Maintenance Tasks

Performing the following tasks based on the recommended schedule could avoid problems, and system slow downs.

### External Backup

The Visual Ticket performs its own internal backups to protect you against, file corruptions, operator mistakes, and session specific problems. These backups will NOT protect you against Disk Errors, Virus Attacks, and Sabotage (yes, it does happen!). We recommend that you;

- Equip your system with an External Backup system such as Tape Backup, DVD Backup, or Removable Disk. Use a reliable Backup software such a Retrospect to do the backups. Backup the entire \SMS folder located on the VT Server.
- Perform a Backup every night, once a week up to 4 weeks and rotate the tapes. So, you need 5 Daily backups, and 4 weekly for total of 9 backup Tapes, DVDs, or folders on the Removable Disk. This means you can go back 5 days, and if necessary a whole month.
- Try a Restore (to another station, or disk) AT LEAST ONCE to insure your backups are valid. Many times people do backups everyday for years, but when they really need to restore, they find out they have been backing up the wrong folder!

### Windows Maintenance

Regardless of which version of Microsoft Windows you use (at least up to Windows XP), the following maintenance tasks are necessary.

Run these tasks on the main C: drive (as well as the disk that contains the \SMS folder, if different than C: ) on each computer, especially the VT Server.

You need to runs these tasks in After Hours, and most like Over Night.

- From My Computer, right click on the disk, go to Properties, go to Tools, click on Error Checking. Make sure "Fix Automatically" is checked. The system schedules the Disk Maintenance for after next Reboot. Restart the system, and let it perform the Disk Check. Perform once every 6 months or when system is unstable.
- From Windows Start menu, go to Programs, go to Accessories, and click on Disk Defragmenter Run Perform once every 6 months or when the system slows down.

### Visual Ticket Cleanup

This utility cleans up old Index Files, and deletes temporary files that may accumulate due to improper Shutdown. On each station, create a shortcut to C:\sms\cleanup.bat Here's how:

- You may run the Cleanup Utility ONLY when NO Visual Ticket, Agent or Micro Florist is running on that station.
- Right click anywhere on your Windows Desktop. Go to New, select shortcut. For the location of the item type:

  c:\sms\cleanup.bat

- Click on next and accept CLEANUP as the name for the shortcut. Click on Finish. Place this shortcut in a folder or somewhere where others don't mess with it.
- Run this shortcut once every 6 months or when prompted by the system to DELETE Temporary files.
- 

## System Supervision

- Always exit Visual Ticket by using the **Exit** selection located on the File menu. Never turn off the system while a Visual Ticket window, Agent or Micro Florist is running. This can cause extensive damage to files.
- Make sure everybody always Closes the Order Pad when walking away. Having the Order Pad open consumes system resources, keeping about 50 files open simultaneously, increasing the odds of File Corruption in case of power outs, or accidents.
- Make sure the Order Pad windows are arranged side-by-side as possible, so that they don't overlap or cover each other up. VT remembers the positions of the different windows and keeps them in the same position. To do this, just Drag the Title of each window and move it into the position.

## Server Shutdown

- Run "**Server Shutdown**" on the Server, at least once per day, when you are ready to close for the day (or the next morning, before your start).

The system automatically loads and runs the "Order Pad Status Review" (also available from **Operations** menu) displaying the overall status of the Order Pad and the Daily Activity, before prompting whether or not, you want to continue with the Server Shutdown.

- This is to insure that the Order Pad Status is reviewed AT LEAST once, before you close out for the day. If "Order Pad Status Review" is already part of your nightly routines, then just you may just close the form and continue with the Server Shutdown.

### Tracking orders in the Browser

Under the **Status** heading of the "Order Pad Status Review" when the Quantity of any of the status lines is Not Zero, the line is presented in Bold Red font with a little button on the right hand side (with "**Open**" icon). These buttons are enabled only when the corresponding Qty is not zero as well. When you click the **Open** button for each line, the **Browser** window opens listing the orders in question.

To access each of the orders on the **Browser** simply click the "**Go To**" button. The Order Pad is opened so that you can make the necessary changes to remove the problem condition. Once you have takes care of the issues, you can click the "**Update**" button to refresh the status lines.

## Changing/Adding Printers

Visual Ticker Order Pads and Agents push the Windows Printer Subsystem to it's limits. This why Windows Printer subsystem must be in it's top shape to handle the pressure. Just because Microsoft Word can print a letter, doesn't mean all is fine in Printer Land!

Make sure you always have the latest Printer Drivers, tight Printer Names, and solid connection to the printers.

Once you add/modify a Printer, you need to go to the **Local Connections** setup, go to **Print** tab, and access all Print Jobs and update the old printer name with the new printer.

If you have created User Defined Template for which you have specified the Paper Tray from inside the template, you need to Modify the User Defined Template and update the printer setup from inside the template.

## Orphan Orders

During normal VT File Maintenance, Orphan Orders (orders that are somehow left incomplete) are deleted. However, you can view the incomplete portions of these orders by going to the "**Misc**." tab of the Setup Manager.

So, if you are looking for "Lost Information" on work-in-progress right before the electricity went out, it is important that you first run File Maintenance, then view the "Orphan Orders". Once you run File Maintenance again, the previous set of temporary Orphan Orders are also deleted.

## Universal Excel Output.

This utility may sound generic, but it is indeed a very powerful tool. It is one of those things, that when you need it, you'll really appreciate having it. With this feature, any important database in Visual Ticket maybe shared, transferred, manipulated and charted using the amazing powers of Microsoft Excel.

Anytime you are accessing information via the Visual Search Engine, the associated database can now be easily exported to Microsoft Excel spreadsheet file by just a few clicks.

The Visual Search Engine is activated when you are selecting customers, Inventory Items, Recipients, Zones, Problem Folders. You could also be using the Super Search utility or other modules that activate the Visual Search Engine. But, regardless of which database is active, you can simply click on the "**Filter**" button (on the upper right corner) and click on the "**Excel**" button (lower right corner).

The Excel files are outputted into the defaults directory of c:\sms\output as the destination folder. However, you may can choose any folder including your windows desktop to save the Excel output file. The Excel file name starts with the Database name followed by Month + Day + Hour + Minutes time stamp. So, as consecutive outputs are one minute apart, they will be saved into different files.

Once the file is generated, you are prompted to start Excel (given you have installed Microsoft Office on your computer), and then it automatically loads the Excel file.

- It is important to note that the Excel output in this case is totally FORMAT FREE containing nothing but the actual PURE data (as opposed to the Excel files generated by the **Save/Send Toolbar** of different Reports, which are full of formatting attributes. It all depends on what you want to do with the Excel file.

## Archiving Posted Transactions

This Posted Transactions Archive utility is available under "**File**" menu after selecting "**Posted Transactions**".

The Posted Transactions Archive Utility allows you to "get rid of" dead weight in your "Posted Transactions" databases, after so many years have passed and the old information is no longer of any use, and can be considered as "Water under the Bridge". This may happen after say 5 years or so.

- The Archive Utility automatically selects the Oldest Year that is currently on file in your Posted Transactions.
- The utility does not allow the archiving of transactions that are less than 3 years old.

The Archiving utility removes transactions in the Sale, Subsale, Deliv, Tran and Subtran tables for the Archiving Year and copies them into

c:\sms\set1\ARC

folder.

The Archived File names start with the Archive Year such as 2002Sale, 2002SubS, 2002Delv, 2002Tran and 2002SubT respectively.

You also have the option to Archive (get rid of) dead weight in the Customer table for those customers who;

- were added prior to the Archive Year, and
- have not made any purchases since the beginning of the Archive Year and
- have no existing Balance.

Once you start the Archiving process, the "Period Totals" utility is activated first to update the "Period Totals" for the months within the Year being Archived. This insure that for the periods being Archived (Removed) the "Monthly Totals" have the most up-to-date information.

# Appendix -1

**Recommended read for:**

1) System Manager

## Getting Connected

### Hardware Requirements

The only hard requirement is the minimum of 256Mbytes of RAM, which is pretty much "standard" at time of this writing. The recommended configuration is minimum of 512 Mbytes with Giga-Bit Ethernet. The speed of the network is the next bottleneck after the amount of memory. So, plan accordingly.

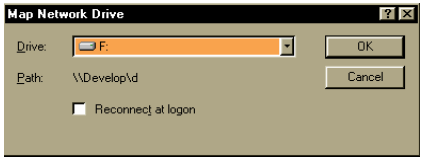
Color Laser printer will come real handy with many of the Visual Ticket Marketing Modules. At time of this writing Xerox 8400 Color Laser printers are available for under a $1,000 and use soap bar like Ink which is quite economical for printing Invoices, Statements, Mail Merge Brochures, Personalized Enclosure Cards with color photos, etc.

Regardless of which printers you end up choosing, all printers must be PCL5 (or higher) compliant. Otherwise you will not be able to use any of the Micro Florist or Visual Ticket's "Basic Format" reports/ticket.

## Mapping Network Resources

Although covering the Windows 95/98/ME/NT/2000/XP networking principals is outside of the scope of this handbook, we give you the following clues in making these connection possible. Please consult with your Network installer, or Windows documentation for further information.

In order to make a resource (whether it is a disk drive or a printer) of one station available on another station, you need to first share the resource (on the first station), and then map it (on the second station).




In order to save money, you may decide to install only one CD drive on the Server for the entire network, and then share the CD drive on all stations, so that you can install the Micro Florist Professional Edition CD on every station.

### Sharing Disk Drives

- Any station that will be performing "Server" functions (such as Micro Florist Server, Visual Ticket Server, Flora-Credit Server, Caller-Id Server, etc.) needs to be mapped on all stations.
  - **Step-1**: Share the disk drive on the Server station. You can do this by going to the "My Computer" window, right clicking on the Disk Drive (usually the C: drive), going to "Sharing" and sharing the resource. Make sure all disk drives are shared for "Full Access" (both read and write). It is important to note that you must **share the entire drive** (not just the SMS folder). Once you have completed this step successfully, you will see a "Hand" under the Disk Drive.
  - **Step-2**: Map the disk on the Satellite station. Open the "Network Neighborhood" window, select the Server station, select the disk, click on the "File" menu, select "Map network Drive", and "Map" the network drive, by selecting a "Local" Disk Drive Id for the Server's Disk. We recommend that you use the "S:" drive for the VT Server's disk drive, the "T:" drive for the Credit Card server, and if the Micro Florist Server data is located on another station then use the "H:" drive for that purpose.

### Sharing Printers

- Any station that is connected to a Printer needs to share that printer will all other stations on the network. A specific printer may be the Network Receipt Printer, that all stations may use to print Credit Card Slips on, or another Printer maybe loaded with pre-printed Invoice forms, in which case, all stations will be using that printer for printing Invoices.
  - **Step-1**: Share the Printer on the station. You can do this by going to Windows "Start" button, selecting "Settings", and then clicking on "Printers". To share a printer, right click on the Printer's icon, go to Sharing, and share the printer. Once the Once you have completed this step successfully, you will see a "Hand" under the Disk Drive.

- **Step-2**: Map the Printer on the satellite station. You can do this by going to "Printers" folder again (as mentioned above), use the "Add Printer" to add the printer on this station. Make sure you select "Network Printer" and select the station, and the specific printer that you need to add to the satellite station. Please use names that are simple and contain the location of the printer.. We recommend names such as "Server_Laser", "Front_Receipt", Office_Invoice", etc. Use the "_" (under score) instead of spaces.

## Installing the CD

Insert the CD into your CD Drive. If the Setup Wizard does NOT load, automatically, go to My Computer on your Desktop, find your CD Drive, double click on the file Setup_NT.exe to run it.

From the menu, you have the option the option to view the PDF of this User's Guide. You can also watch a few Introduction to VT Movies. We strongly recommend that you watch these movies at least twice!. This experience may give you a bad head ache, but it in the long run it will give you good understand of the "Look & Feel" of Visual Ticket.

You can also select the "Install CD" option and install the CD.

Always install the CD on the local C: drive of each station. You can also install on other LOCAL drives, but you would need to modify the shortcuts.

Once installation is completed, the Setup Wizard opens a folder containing the Shortcut. Drag and drops them on to you Desktop.

If you have installed the CD on a drive other than the C: drive, right click on the shortcut and modify the Target drive.

On stations other than the VT Server, you only need to copy two shortcuts. Visual Ticket shortcut, and the other points to the vt_manual.pdf file which is the electronic version of this User's Guide.

The CD always installs the Limited User Version (LUV) which always times out after a certain period of time.

For customer who purchase the License to run the Visual Ticket, obtain a Floppy and a Hardlock device which "brands" the software to customer's Serial Number and turns it into the Permanent version (aka the "Unlimited User Version - UUV).

### Terminal Service Installation

If you are installing the VT system on a Terminal Services (TS) environment (aka Thin Client), then you need to partition the Server's drive(s) to as many stations as you envision running in the next 2-3 years.

We believe a reasonable compromise for maximum number of TS stations running on a single Server is somewhere between 10 to 15 stations. In either case, the amount of installed RAM memory is the most critical factor. Start from a minimum of 3 Gigs for running up to 10 concurrent TS stations. For between q0 to 15 stations, 5 Gigs is the recommended minimum.

Once you create all the necessary partitions, you need to install the CD on each and every partition. You would not need to re-install the Runtime Environment and the Hardlock Drivers on all the partitions.

Then you need to past the shortcuts on each station's Desktop, and then modify the shortcut to run from that station's designated Partition.

When installing the Visual Ticket CD, the Setup Wizard prompts you to view a Read-Me that also contains the Visual Ticket Software License Agreement. It is absolutely necessary that you read and accept the terms of the License Agreement before you use or install the software.

# UUV Installation

## Hardlock Key

The Unlimited User Version (UUV) (aka the Permanent version) of the Visual Ticket is a "Copy Protected" software with the customer's Serial Number, the configuration of the entire system and the number of stations is programmed into (and controlled by) a little connector type device called the "Hardlock" key.

NOTE Your entire investment in the Visual Ticket Software License is "protected" (held) in this Hardlock key. The "Replacement" cost for the Hardlock device is indeed the "price" you paid to obtain the entire Visual Ticket system. Now that you know this important fact, you should protect and insure this device accordingly. Anybody who owns the key, owns the software.

Please locate the key, and install it on the VT Server station (Station #1). The Key is installed on any of the USB ports of the computer. We recommend that you connect the key to a long USB cable and put the other end of the cable that hold the Hardlock key in a locked Desk Drawer. Remember, if somebody jokes around and takes the key, you will not be able to use the system while the key is missing.

## Installing System Configuration

Another important step in the setup of the Visual Ticket server, is the actual "installation of the configuration" sent to you as part of your Purchase Order. Installing this file will activate the "Unlimited Usage Version" (UUV) of these products on your system.

Start Visual Ticket, from Tulip screen (Startup Utility) click on Connections button, and then click Configuration button to activate the "Configuration" window, click on one of the appropriate button "Disk", "Current" or "UUV" buttons depending on;

- If you have received a Floppy disk containing your new System Configuration, please insert it in the VT Server's floppy drive and click on the "Disk" button. Select the default (or the appropriate directory, in case of multiple shops) on the floppy disk and click the "Select" button.
- The "Current" configuration is automatically downloaded and installed whenever you login to VT. The "Current" Configuration is the configuration that your system is supposed to be running at the present time. It maybe a Tine Limited or an Unlimited Usage version. Once the "Current" configuration is downloaded and installed, it is removed from the server.
- The UUV button downloads the permanent or the Unlimited Usage Version (UUV) of your system configuration (given it has been prepared and posted by Visual Ticket Support). The UUV configuration WILL NOT run, if you have not received your Hardlock unit. Once you click the UUV button and download the permanent version, the UUV configuration file remains on the VT Servers for future downloads, in case needed.
- Do not use the UUV button unless you have been informed by Tech Support to do so. That would imply that your new configuration has been prepared and posted (uploaded) to your Mailbox on the Visual Ticket Servers.
- The system prompts you to enter your Serial Number (which is usually your main phone number). Make sure you are connected to the Internet, enter the serial number and hit the Enter key. The system downloads the new configuration, and if successful, it prompts you to insert a Floppy disk (so that you can make a backup copy of your configuration file). Making a backup copy is optional.
- The system will take a moment to install the new configuration files.

Once the new System configuration is installed, please close the "Configuration window, close the "Local Connections" form by clicking on the Exit (the door) button, and then close the Tulip screen ("Startup Utility") by clicking on the "Cancel" button. This will terminate the Visual Ticket system on the Server.

Re-start the VT on the Server. The systems informs you that the new configuration has been installed and proceeds to the Tulip Screen ("Startup Utility".

This time, when click on the Station number dropdown, it will contain the number of stations you have ordered, and it should also indicate that the station is "Unlimited Usage".

As mentioned above, each station (based on the Station # selected on the Startup utility), contains a specific set of features based on your purchase order.

Click on the "Connections" button, click on the "Configuration" button for each station to verify that all the available features match the configuration specified on the Purchase Order.

You can check the configuration of ALL stations from a central location, by activating the System Monitor agent, select each station on the left column, and by then clicking on the Configuration button, you can see the features installed on that station.

### Selecting the Station No.

After you start the Visual Ticket (VT) system, the "Start Up" utility is displayed. Please make sure you select the correct station number for each station.

Always select Station #1 for the VT Server. Once a station number is select for a station that station number becomes the default for that station. If you start two work stations with the same station number, the system will terminate the first session by indicating that only one station can use the given station number.

When would I change the station number, and why ?

Normally, you only select it the very first time you are using a given station number. The system remembers the station number for your future logins.

For more advanced users, since the Station # is "portable", you can run a different Virtual Station number from any computer on your network Meaning you can run station#4 (with it's features) on Computer #3. As long as you setup the Local Connections properly, for each station number you select from the dropdown on that computer.

NOTE Make sure you select the RIGHT Station No. before you click on the **Connections** button, because each station number has its own set of Local Connections.

### Password Protection

There are certain sensitive areas of the system that are accessible before an operator has actually logged in (ie before his/her access level is determined). These areas include;

- Access to the "Local Connections" setup, and
- The ability to change the Station Number during login.

Please note that Master Password is discussed in Setup Manager's **Environment Setup**. This is the password that would be required if and when you decide to password protect the access Local Connections, or the change of the Station No (on the Startup Utility).

The Manager (override) password allows access to Financial information while the Master Password provides the highest level of access to the sensitive "System" areas (as well as the Financial information).

It is recommended that you enable Password protection for these areas, if you believe you have "curious" employees.

➢ To Password Protect the access to Local Connections and the changing of the Station # at the Startup Utility (which we also call the Tulip Screen), please access Local Connections, click on Acc-2 tab.

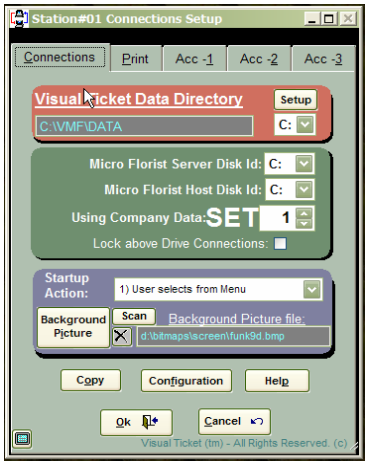
## Local Connections

The first time that you are starting VT on a work station, as soon as you select the station number for that work station, you should click on the "Connections" button. This is the most important step in setting up each new station.

Please note that the "Connections" page for each work station is "Local" for that station, and everything that is setup on this page, only applies to that specific work station, for the specific station number selected.

This means the location of VT Data, Micro Florist Server, Mercury Interface, Dove Interface, Bloomlink Interface, Caller-Id, Flora-Credit, etc. are setup for each station, and they maybe different for the station number selected on that work station.

### VT Data Directory




This is the Data Directory for the "Central Order Pad". Please drop down the list and select the VT Server disk.

If you are on station #1 (which means you are on the Visual Ticket Server work station), please select the local disk drive that contains the Visual Ticket system (this will usually be the C: drive, unless you have selected a different disk drive to install the VT on).

If you are on a "Satellite" station (station 2 thru 99), then you must change the default local drive (usually the C: drive) to the Server's Disk Id. If you don't see

the Server's Disk Id on the list of available Disk drives, it means that the Server's Disk has not yet been mapped on this work station (see Mapping Network Drives above).

We recommend that you use the "S:" drive for this purpose. Once you select the S: Drive, the system will automatically use the S:\SMS\VFT\DATA directory on that disk.

## MFS Server Directory

This is the Posted Database (Micro Florist) Server Disk drive. The MFS directory is the location of Posted Database (Micro Florist) data containing all the financial information (including the Customer, Inventory, and Posted sales and transactions records). Micro Florist data maybe stored in one of the 5 identical directories labeled Set1 through Set5. Each set contains a complete set of data files for companies 1 through 5. Once a Disk drive is selected, you should then identify which one of the five "Set" directories should be used.

In most cases the MFS Server Disk is the same as the VT server (unless the Network Manager has determined that MFS Server should be located on another server). If your network is setup for a single Server, for station 2-99 select the S: drive again for the MFS server.

As far as which Set directory should be used, usually you will select the Set1 directory for the actual (real) data. Please note that you may use the Set5 directory, as the "Practice" directory. This will allow you to "play around", and add customers, change Inventory, post sales etc., without actually affecting the "real" data (since the real data is stored in the Set1 directory).

## MFS Host Directory

The Micro Florist Host disk, contains the Flora-Ticket order pad, and the Master Florist Directory file. For customers that are not running "Dual Domain" configuration of Visual Ticket and Flora-Ticket, this will always be the same as the "MFS Server Disk" (meaning the S: drive).

For customers who are upgrading from Flora-Ticket POS system, or are running a "Dual Domain" of Visual Ticket, and Flora-Ticket systems, this will be the disk drive of the Micro Florist Host (anybody who is running Flora-Ticket would know which station is the Host).

## Locking Drive Connections

This will "Lock" the connections specified for VT and MFS disk drives.

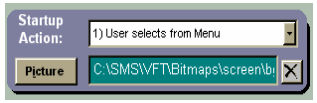
***Pros:***

When starting the VT system on a Satellite station, if the network connections are not available (due to network problems), the system will **not** allow the Operator to select different directories. This insures that orders are not placed into the wrong directory, or customers are not added to the "local" drive instead of the MFS server directory.

***Cons:***

In case you have re-mapped the Network drives for VT or MFS drives, you will not be able to start VT. So, do not lock the network drives until you are sure that the network connections have been finalized, and will always be available.

## Startup Action




This will setup the "Startup" action on each station. As you probably know, Visual Ticket Agents must be run on "few" of the stations. We will be talking about how Agents need to be distributed on different stations, later. Once Agents have been setup to run on specific stations, those stations that have "Agent" responsibility, we must setup the "Startup Action", such that the assigned Agents are started automatically, as soon as the VT is loaded.

For the time being, we will setup the Startup Action on the Server to be #5 (Start assigned agents for this station). This is due to the fact that the Server must always run at least the Monitor Agent. Other Satellite stations will be set to #1 (User selects from menu) until we have determined which Agents will be running on which one of the stations.

## Backdrop Picture

This is the "Backdrop" picture for each station. Please click on this button, and select a bitmap to be displayed as the "backdrop" picture on each station. We recommend that you use a different pattern for each station.

By clicking on the Picture button, the system opens up the File Selection Dialog, allowing you to choose an Industry Standard Picture file (.BMP, ,JPG, …) to be used as backdrop. You can select anything from a family photo to a special Occasion or a Holiday theme. If you leave this field empty, every time File Maintenance is run, it puts in the Visual Ticket Logo, so you might as well select a picture that you really like!

### Multi-Media Players

Visual Ticket uses the "Windows Media Player" (wmplayer.exe) as the Default Video Player.

As a reminder, Visual Ticket allows you to save Inventory Item specific "Audio" or "Video" files (meaning a specific Audio / Video file can be loaded for a specific Inventory Item) and then played back when you access that item (either from the Inventory profile window or the Prep window, during Production Tracking) by clicking the Multi-media button. For example, the Video file may contain instructions for "making" that item.

The same feature is also available for specific Customers, or specific "On-Site Help" records. Meaning, you.

# Automatic Start-up

## Bypassing normal Log-in

Sometimes during the night, due to either power outages or Windows Automatic Updates, the Server is forced to Reboot (restart). In which case, the Visual Ticket and the Agents will no longer be running after the Re-boot has taken place. This can cause certain Wire Services to re-allocate your wire-in orders to other shops, while the associated Wire Service Agent is off-line.

To remedy this situation somewhat, you have the option to Automatically Start-up the Visual Ticket and then bypass the "normal" Log-in procedure. "Normal" refers to when there are no other dialog boxes such as the need to run Month-End Routines, etc.

When enabled, the system clicks the "Continue" button (on the Tulip screen) after a 1 minute delay, and then automatically enters the Default Password (on the Employee Login screen) after another minute of delay.

- So it is important to note that when this feature is enabled, the Password Protected Entry into the system is bypassed (disabled).

To enable this feature, from Local Connections (on the Server - Station #1), click the "System" tab, and check the new "Bypass Login" checkbox.

## Auto-Startup of Visual Ticket

To have Windows automatically launch Visual Ticket upon Windows Start-up (ie; after a Re-Boot), right click on the Visual Ticket shortcut, and select "Copy".

### Windows XP

For Windows XP start from "My Computer" go to the C Drive, go to "Documents & Settings", go to "Start Menu", go to "Programs" folder, and then click on "Startup" folder.

### Windows Vista

For Windows Vista, start from "My Computer", go to C Drive. go to "Program Data", go to "Microsoft", go to "Windows", go to "Start Menu", go to "Programs", go to "Startup" folder.

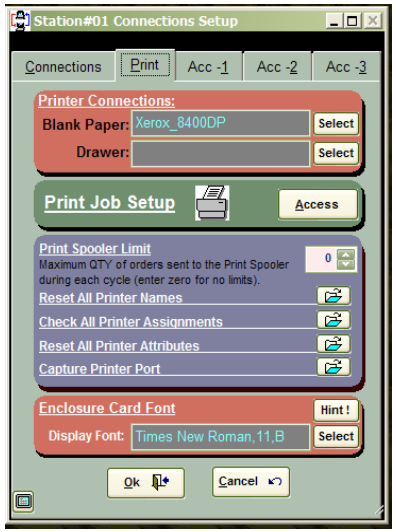
### Copy Shortcut

- Now, right click anywhere in the Startup folder, and select "Paste". This will copy the Visual Ticket shortcut into the Automatic Startup folder which will cause Windows to run Visual Ticket after it starts up.

Now, in order to make sure everything is setup properly, restart Windows and verify that Visual Ticket starts automatically while the User log-in is bypassed (after couple of minutes of delay), and the Agents are launched without any User input (to simulate an over-night reboot).

# Print Setup

On the "Local Connections" form you will notice the "Print" tab. Please note that the Printer setup for each station is also a "Local" event for that station. This means that Station #2 can print a different kind of Delivery Ticket Station#1.




### Blank Paper Printer

Click on the select button for "Blank Paper" and select a printer to be used as the "Default" printer used for printing Reports on this station.

### Cash Drawer

Click on the select button for "Drawer" and select a printer that is connected to the Cash Drawer. If this station is not configured to be a POS station (meaning it is not setup for Cash Drawer), select the Blank Paper printer again. We do not recommend that you select the Cash Drawer on a remote POS station, since you really don't want somebody at the Office (for example) be able to open the Drawer connected to the Front Counter station (or maybe you do, so think about it).

### Print Spooler Limit

Depending on the Operating System (Windows 95 specifically), and the Printer Driver used, for some High Volume shops during busy Holidays, the Print Spooler has had problems handling over 350 - 500 print jobs in the Spooler queue (Referred to as "Spooler Overload"). This problem only occurs when the station running the Print Agent is using a printer located on another station (on the network). What happens is that, on the station that owns the printer, usually 170-190 print jobs get stuck in the queue, and are never sent to the printer, with new print jobs processed on the "Last in first out" basis.

With this feature, you can prevent "Spooler Overload" by simply setting a limit for the number of orders processed during each Print Agent Cycle. When the limit is reached, the system stops sending Print Jobs to the Spooler, and waits for the User Response. The user waits until all current queued jobs are sent to the printer (spooler becomes empty), thus preventing any possible Spooler Overload.

### Pushing it to the limit

Sometimes Printer weaknesses show up more in Visual Ticket than any other windows application, simply because VT pushes the Windows Operating System, especially Printer Drivers/Hardware to its limits. The Print agent and various Order Pad windows send multiple and simultaneous (some of them very complex) print jobs to multiple printers in real time. Basically Print Jobs are zigzagged all over the place. This is so vastly different than other applications that occasionally send a print job to the default printer, one at a time. This requirement forces any weakness in windows Operating System, specifically the Printer subsystem, to show up in Visual Ticket.

So, just because a printer works properly in Word or Excel doesn't mean it will also work flawlessly when put it under the pressure the Visual Ticket puts on it.

Rearranged the "Utility Functions" (with respect to Printers and Print Jobs) on the Print Tab of the Local Connections. These Utilities are now grouped together and are located under the "Spooler Limit" settings. They are;

## Print Job Utilities

### Reset all Printer Names

- Changes the Printer Assignment for ALL print jobs, to a valid Printer name which is selected from the list of available printers on that station.

The very first thing that needs to be done on each station is to click on the "Reset all Printer Names" button. This will insure that assigned printers on this station have a valid name. System will bring up the "Printer Selection" dialog box, and will allow you to select a printer from a list of available printers on that station.

### Check All Printer Assignments:

Checks the Printer Assignment of ALL Print Jobs and verifies that the Printer Name actually exists in Windows. If it does not exist, then it prompts you to select a Valid Printer Name for that Print Job.

### Reset Printer Attributes

Removes the Printer Attributes left by accident inside any of the Factory (non-User Defined) Templates. Use this utility if and when a Print Job goes to a Printer other than the one assigned in the Print Job Setup.

### Capture Printer Port:

Mainly for use in Micro Florist Printing, where the DOS Print Jobs are sent to a valid LPT port. This utility uses the NET USE command and captures the LPT1 port for a specific Printer available on the Network as a resource.

Please note that for this utility to work properly, the "Computer and Printer" names on the network must not exceed 8 characters (must have a valid DOS name).

## Setup Print Jobs

Click Print Job Setup "Access" button on to setup print jobs for each Division.

Notice the form contains a button for each print job generated by VT. For Division number you select on top, you will be setting a whole different set of print jobs for that division.

### Direct Printing

Print jobs are divided into two separate categories. In Category #1 are print jobs that print "directly" from each station. These include

- Cashier Receipt (by clicking on the Receipt button on the payment form)
- Credit card slip (by clicking on the Slip button on the Payment form)
- Hardcopy (by clicking on the Hardcopy button on the Order Pad form)
- Credit Card Decline Ticket (generated automatically once a card is declined).
- All the Reports printed from the Report Launcher.
- Delivery Manifest Report (available in the Flora-Map button on the Delivery form).
- Wire Relay Ticket (usually faxed to the filling Florist, available in Wireout form).
- Visual Ticket Error reports.

### Central Printing

In Category #2 are the Production print jobs that are handled only via the Print Agent. These Print Jobs are only relevant (and need to be setup) on the station that actually runs the Print Agent. You can simply ignore these print jobs on the station that does not run the Print Agent.

The mechanism for Central Printing, is that orders are tagged with a "Print Request" for a specific Print Job. The Print Agent keeps monitoring the Order Pad and as soon as it finds a Submitted order with a Print Request, it gets busy and first looks at the Division number assigned to the order. Then it find the Print Job setup for that division, and sends the Print Job to the Printer assigned for that job. These Print Jobs include:

- Work Ticket (Print Request setup in the Prep form)
- Delivery Ticket (Print Request setup in the Delivery form)
- Shipping :Label (Print Request setup in the Delivery form)
- HardCopy (Print Request setup in the Other Info form)
- Enclosure Card (Print Request setup in the Card form)
- Combined Ticket (Print Request setup in the Other Info form)
- The Delivery Manifest Report (available in the Flora-Map button on the Delivery form).

Print Jobs are Division Specific. If you are planning to use Division numbers other than Division #1, you must change the division number on this form and setup each print job again for each individual Division number you are planning to use.

Once you click on a Print Job button, you will notice the "Print Job Setup" form contains 2 sections:

## Basic Format

This is the Non-Template (hard-coded) style for each Print Job. The Basic Format means text out put containing no graphics components (such as pictures, boxes, etc.). The font that is used, is what-ever font that is the default Printer font (meaning fonts are not downloaded to the printer).

***Pros:***

They are fast and sometime the ONLY means of printing certain Print Jobs. For example, for the Cashier Receipt print job is not even possible to use a Template Based (graphics) print job. The Dot Matrix nature of these printers will print such a ticket in longer than 10 minutes, and push waste feet of blank paper roll with every Form Feed! So Basic Format Print Jobs print faster, especially on Dot matrix printers.

***Cons:***

They are not as fancy as the Visual format, and may not contain Pictures, boxes, drop shadows, etc.. The Basic format programs are hard-coded in software and are user modifiable..

The "Program" button allows you to select a different printing program (format) for a given Print Jobs (given that more than one Basic format is available).

The "Printer Control Code" dropdown box allows you to select the Printer Setup code for the type of Printer (whether it is Dot Matrix or Laser). Please note that these Printer Setup codes are setup in the (local) Micro Florist system.

The family of the Printer Control Code is select on the Local Micro Florist (accessed from the VT Help menu). To change it, from the MFS Setup menu, go to Division, go to Environment Setup, and then select Printer Configuration. There you will be able to setup the type of Printer.

When printing the Basic format, if you notice strange characters being printed, then chances are the system is picking up the wrong Printer Control Code file, or the Printers are not setup correctly in the local Micro Florist system.

### Printer Control Files

When selecting the Basic Format, the system allows you to select the "Printer Control Code" file from a Dropdown List box. This is due to the fact that when using the Basic Format, the Visual Ticket system "borrows" the Printer Control Codes from the "local" Micro Florist system.

The Printer Control Codes consist of commands necessary to control the Printer output with respect to printing condensed, bold, italics, etc., etc. Each control code file (i.e. Print-1, Print-2, and Print-3) corresponds to the 3 basic families of Printers selected in the Micro Florist Printer Configuration for Main Printer, Receipt Printer, and Card Printer respectively. The Auxiliary Print-4, Print-5, and Print-6 control files are used when the Micro Florist setup can not accommodate Visual Ticket requirements (see below).

- Click on the Class button, to see whether Laser or Dot Matrix family of printers is embedded in the selected Printer Control Code.
- Click on the Test button, to verify the Printer is PCL5 compliant (meaning it can read and understand these Printer Control Codes.

On the other hand, if the Local Micro Florist is being used, but all of the three groups of printers have been assigned to Printer brands other than what you need to use in Visual Ticket, you can use the Auxiliary Print-4, Print-5, and Print-6 control files. These Auxiliary Printer Control files are not generated (or used) by the Local Micro Florist system.

For example, to use print-2 control file from the Server, as an auxiliary control file on this station, you would:

```
COPY S:\SMS\SET1\print-2.mem   C:\SMS\SET1\print-4.mem
```

And then select the "print-4.mem" Printer Control in Visual Ticket for the specific Print Job you have in mind (independent of what the local Micro Florist is using).

## Visual Format

This is the Visual style for each ticket. The Visual format uses Windows printer subsystems allowing the system to send graphics components (such as pictures, boxes, etc.), as well as upload fonts to the Printer.

**Pros:**

They contain full graphics components, fancy fonts, and above all, are User Modify-able.

**Cons:**

They may print slower on Dot Matrix printers.

Obviously, we recommend using the Visual Format, given that you have Laser Jet (or Desk Jet) printers. In order to setup the system, so that you can start going online as soon as possible, go ahead and select the default style and template, as it is setup in Factory Defaults.

For Production Paperwork (Work Ticket, Delivery Ticket, Enclosure Card, Shipping Label and Combined Ticket Print Jobs), you can specify the "Number of Copies" printed for each Print Request. This is especially useful if you like to have duplicate copies of certain print jobs.

Please do not use the "Advanced" button, unless instructed to do so by Technical Support.

## Fine Tuning Print Jobs

Once you have some time, you may change the Print Job setups, and obtain sample printouts for further evaluations.

You may select both the Basic and Visual formats to print two copies of each ticket, sent to two different printers. This maybe a requirement for a larger shop that requires the Print Jobs be sent to different (local or remote) printers.

For companies that have multiple locations, you may setup a "Remote" printer (by using the Dialup Networking features of Windows), and then have the Print Job be printed on a printer located at another shop.

## Division specific Print Jobs

Each order contains two different Division number. The "Sold Division", which is the Default Division number setup for that specific session, where the Order was entered. The "Assigned Division", which is the division number that can be changed on each order (in the "Other Info" button on he Order Pad). The "Assigned Division" is the division (or location) that will be filling the order, and will receive the revenue for that order.

Print Jobs that are printed for each order is automatically selected based on the "Assigned Division". This means, if a given order is assigned to division #2, then VT will print the print jobs setup for Division #2 for that order. Lets assume you have selected a local Laser printer for enclosure cards for all orders that are assigned to Division #1, but you have selected a Remote printer (connected via modem through Dialup Networking) for enclosure cards on orders assigned to Division #2.

As you can picture in your mind, system will automatically send the right Print job to the right location based on a simple Division assignment.

### Printing tickets for Processed Orders only?

- This checkbox must always be unchecked, unless…

When you check this checkbox, the Print Job is NOT printed until the order is submitted AND processed. If you only run the Process agent at nights during Server Shutdown, then obviously your print job will not print, until the next day!

However, if you are running the Process agent every 10 -15 minutes, and want to further tighten up the printing conditions, so that ONLY Posted orders are made, then you may go ahead and check this box.

### Prompt the User to select a printer

This should only be checked if the circumstances of your operation require that specific tickets be printed on different printers. For example, you may want to print invoices on a printer that is loaded with Blank Paper for internal use, but at the same time have the option to send the Invoice to another printed that is loaded with pre-printed forms, for mailing it to a customer.

### Generic Output

Generic Output refers to tickets NOT printing your company information.

Some print jobs such as Billing Module's Statement/Invoice maybe printed on Pre-Printed forms. These pre-printed forms may or may not already have your Shop Logo, Shop address, and phone printed on them. Uncheck this box only if you are using a pre-printed form that already contain your Shop Logo for that specific print job.

## Hardcopy of all orders

### Hardcopy Before Save

If you prefer to have a hardcopy of all orders that are entered, the Visual Ticket system accommodates this by automatically printing either an Invoice or Detailed ticket for each order that is entered (before the order is saved). If you are planning to use this feature, you would need to allocate a printer, somewhere on the network, that is loaded with blank paper for this purpose. Obviously, you would not want to use "pre-printed" invoice forms for this, since the intent is keep a paper trail for audit/verification purposes. You may still have another printer that is loaded with pre-printed invoice forms, for cases where you actually need to print a real invoice for a customer.

In order to activate this feature, please setup the "Invoice" print job on each station, and check the "Prompt the User to select a different Printer" checkbox, if you like to have dual Invoice printing capability (whether it prints on a blank paper, or on a pre-printed form).

Please note that for obtaining a hardcopy of each order, you have the following 2 options.

- The Inv1 Basic Template, which produces the standard Invoice output. This option prints faster, and it may also be used for a Customer Receipt. However, the output does not print ALL details in an order such as the Enclosure Card message, and Delivery Instructions.
- The Detail1, and Detail2 Visual Templates produce all the necessary detail, such that the order can be re-entered from the information contained on these tickets. You may also use the Copy button on the "Invoice" Print Job setup to create a User Modified template, and then proceed to modify the ticket to better suit your requirement.

Now to actually "Turn on" this feature, use the Session Defaults, access the "Order Entry" tab, and check the "Invoice (order hardcopy)" checkbox for each (applicable) session. Please see Session Defaults section later on in this manual.

### Hardcopy via the Print Agent

You can also print the Hardcopy print job as the "Visual" format of the Combined Ticket (in the background via the Print Agent).

The benefits are a) The Operator doesn't have to be bothered with it, and b) Printing in Background speeds up the order entry process. On the other hand, if the purpose of printing the Hardcopy is to insure the printing of a Hardcopy before the order is saved (in case of a system crash), printing it in the background, removes that certainty to some degree. Since you would be relying on the Print Agent to print the Hardcopy, after the customer has already hung up the phone, or has left the shop. In this case, you may wish to enable "Background Save" feature to compensate (to some degree).

To setup the system to print Hardcopy as the Visual format of the Combined ticket, in Local Connections (on the Station that runs the Print Agent). Go to Print Job access, click on Combined Ticket. Select "Do Not Print" for the Basic Format. Select detail3 for the Template and select a valid printer. Please specify the output to go "TO PRINTER" and check "No Console" checkbox. Then on each station, go to Session Defaults, go to Order Entry tab. Under the Print Request section, uncheck "Invoice (Order Hardcopy)" and instead check "Combined Ticket".

### The Re-Print Label

For the following Visual Ticket Templates, the word "Re-Print" appears on the top of each ticket when the quantity printed exceeds 1.

These templates include the Visual Work Tickets, the Visual Delivery Tickets, the Visual Enclosure Cards, and the Hardcopy tickets.

This purpose of this label is to warn your Designers/Drivers that the original copy of the specific ticket has already been printed at least once, and that this is a re-print of the original ticket.

## Which Combined Ticket ?

Visual Ticket provides two completely different kinds of the "Combined Ticket" print jobs. The Combined Ticket is referred to as a single sheet of Legal size paper (11" X 14") which is perforated to have the Enclosure Card on top (in 3 panel Horizontal layout), while the button portion is the Work Ticket, and the Delivery.

## The "Basic Format" version

The Basic Format (also known as the "Legacy" Combined Ticket) has the Enclosure Card on top, the Work Ticket, the Customer Invoice and the Delivery Ticket all at the bottom portion.

It uses "Printer Fonts", it is "Not User Modify-able" and it has a limit of 3 Line Items per order.

Since the "Combined Ticket" is NOT Line Item dependent (you get one Combined Ticket per order), the Print Request for it, is located on the "Other Info" form (and not on individual Line Items).

The Print Job setup for it is accessed when you click on "Combined Ticket" button located on Print Job Setup. Then by selecting the "Basic Format", you can select the "Comb Tick" as the "Program" If you select the "Visual Format" of the Combined Ticket Print Job, then the system prints the "HardCopy" print job whenever there is a Combined Ticket "Print Request" pending.

The "Legacy" Combined Ticket is not very "pretty", but it is fast and it has the information you need. Try it, you may like it.

## The Visual Format version

As mentioned above, there are a few shortcomings with the Basic Format (the Legacy) "Combined Ticket" including "Text Only" output (as opposed to "Graphics" output), the 3 Line Items per order Limit, and most importantly inability to modify and make User Defined Templates. It also can not provide "Barcode Scanning" capability because of its Text Only nature.

This why we have introduced the "Visual Combined Work Ticket". Like the Legacy Combined Ticket, it has a 3 Panel Horizontal Enclosure Card on top, the Work Ticket on the lower left and Delivery Ticket on the lower right side of the legal size perforated stock. So, you should be able to use the Standard Combined Ticket stock available from John Henry with hardly any modifications (but this does mean you should not first run a few sample before you go ahead and order a whole bunch!)

With the "Visual Combined Work Ticket" there is NO three line item limitation, and you can have up to 99 line items per order. You can also modify the template and create your own User Defined Versions of the template. It has full Barcode Scanning capability since it already comes with Barcode Labels for both the Work Ticket, as well as the Delivery Ticket portions.

Since the "Visual Combined Work Ticket" is really just a larger than usual "Work Ticket", you can setup the print job under Work Ticket Print Job setup (by choosing the Visual Format and selecting the w_comb1 template).

It also uses the Work Ticket Print Request checkbox (on the Combined and the Prep forms), instead of the Combined Ticket Print Request checkbox that is located on the Other Info form.

Since the Combined Work Ticket already prints the Delivery Ticket and the Enclosure Card, you need to make sure you turn off the "default" Print Request for Delivery Ticket, Enclosure Card, and the Combined Ticket in the Session Defaults (under Order Entry tab).

Please note that you can select the same "Combined Work Ticket" (template w_comb1) for Delivery Ticket and Encl Card print jobs as well. This means you can print EXTRA copies (for Funeral orders), by simply checking the Delivery Ticket (or the Encl. Card) point request.

For example, in this case, if you have checked the print requests for Work ticket, Delivery Ticket. and Encl. Card then you'll get 3 copies of the same ticket.

## HardCopy Alert for Incoming orders

You can setup the Dove, BloomLink Mercury and VOX agents print a "HardCopy" of ALL incoming (wire-in and website) orders, as soon as the orders are brought into the Visual Ticket Order Pad.

NOTE The main purpose of printing the HardCopy for Wire-In and VOX orders is to ALERT the staff that a new order has arrived. Otherwise, usually, each of the wire systems prints i's own copy of the incoming order.

The HardCopy will most likely always print the order in it's ORIGINAL form (before you get a chance to modify and submit it), due to the fact that the HardCopy is printed as soon as the order is imported and the Print Agent runs it's next cycle.

### Setup HardCopy Alerts

- Check the "**Print HardCopy for Wire-ins**" checkbox in Local Connections section for each Agent.
- Check the "**Print HardCopy for Incoming orders**" checkbox on the VOX utility (accessed from the **File** menu).
- Setup the HardCopy Print Job in Local Connections for each division.
  - Make sure **Output** goes to "Printer" and "**Prompt user to select a printer**" checkbox is NOT checked.

### How it works?

The Dove, BloomLink, Mercury and VOX agent adds a HardCopy Print Request when importing order. The Print Agent then prints the HardCopy during it's next cycle.

Unlike "Production Paperwork", the HardCopy prints regardless of order status. In other words, the HardCopy Alert prints even when the order in On Attention, Standby or not yet submitted. This is why it is referred to as "Order Alert" print job.

### Local versus Central Printing

Normally the HardCopy is a LOCAL print job specified locally on each station's Local Connections.

But in this case, The Print Agent prints the HardCopy Template CENTRALLY (from the Server) sending it to the Printer, that setup for each division, in Local Connections of the Server (or the station that runs the Print Agent).

In other words, the HardCopy that prints for incoming (wire-in or VOX) orders may use a different template sent to a different printer, depending on the Assigned Division (so that Alerts are noticed at different locations).

### HardCopy Alert Print Request

The HardCopy Print Request is accessible from the "Other Info" form.

When you check this check box, the Print Agent will then print the HardCopy (instead of the station printing it locally).

Unlike other Print Requests, if you don't specify a template (selecting "Do not Print") for the HardCopy print job for a certain division, then the Print Agent will REMOVE the Print Request. Thus, if you don't want to print the HardCopy for Dove's incoming orders for the Main shop (ie; Division #1), then select "Do not Print" for the HardCopy Template.

When HardCopy Print Request is pending, clicking the little button with a Printer Icon (located on the upper middle of the Order pad) REMOVES the HardCopy Print Request, as well as the other print requests.

When selecting "Remove All Print Requests" from the Operations menu, the utility will also remove ALL pending HardCopy Print Requests.

## Thermal Printers

Visual Ticket also supports Thermal Printers (such as Samsung SRP-350 and compatible models from Epson and Star Micronics) as replacements for Impact Receipt printers such as the SP200 and SP300 from Star Micronics. The Advantages of Thermal Printers are:

- Graphics output (use of various Fonts and logos).
- Visual Format Templates allow you to modify and create your own User Defined Templates.
- Faster yet more Quiet printing.
- Prices are about in the same range and in some cases, lower.

The following new Visual Templates are available for corresponding print jobs;

- Cashier Receipt Print Job- Template Rect_1: Prints the Standard Visual Format Cashier Receipt.
- Cashier Receipt Print Job- Template Rect_2: Prints the Visual Format Cashier Receipt + Credit Card Slip.
- Credit card Slip Print Job- Template ccSlip_1: Prints the Standard Visual Format Credit Card Slip.
- Decline Ticket Print Job- Template cc_Dec1 Prints the Standard Visual Format Decline Ticket.
- Payment On Account Receipt: - Template Rec_Acc: Prints the Standard Payment on Account Receipt. (this template is not available as User Defined Template).

Please make sure to enable the "Automatic Cutter" on Thermal Printers by going to the Printer's Properties (under Windows "Printers & Faxes"), and then click "Additional Commands" tab and check the "Cut Receipt" checkbox.

### Adding Logo To your Receipts

From Local Connections, go to the Print Tab, click "**Print Job Access**" button, go to the Cashier Receipt print job, and select template Rect_1 (or Rect_2).

- First make a User Defined copy of the template by clicking the "**Copy**" button. Now select the uRect_1 template and click the **Modify** button. Then click on **Modify Report.**
- In Template Editor, maximize the windows, and move the "**Group Header1 master_id**" band down (by dragging it) by about an inch.
- Group select everything above the band by dragging your mouse over them. Now use the Down Arrow key and move the group down to the same relation to the band as they before you moved the band (all this to open space for your Shop Logo on top of the Receipt).
- From the Report Toolbar (which you should get it out of the way by anchoring to the top of the screen toolbar), click on the second from the right with a small "OLE" icon on it. The Tool tip for the button says "**Pictures, ActiveX Bound Control**" when you move your mouse over it. The shape of your mouse pointer changes to cross hairs.
- Now make a rectangle by dragging your mouse at the location you want the Logo to be. The Properties window pops up. In front of the File field there is a button with 3 dots. Click on it and locate your logo file on the disk. Make sure you check the radio button "**Scale Picture Fill the Frame**". This will put your logo on the Receipt.
- Adjust the height and width of the Logo rectangle to make it look the way you want it.
- Save and Close the Template Editor.

### Thermal Printers and The Basic Format

You can still use the Basic Format for Thermal print jobs (either as the only print job, or in combination with the Visual Format in case you need two copies that look different). In this case you need to use the Printer Control Code print-3.mem from the dropdown. The print_2.mem (for Star Micronics SP200 and SP300) Control Codes still work, but the fonts are smaller and the Paper Cutter will not work.

To verify you have selected the correct Printer Control Code, click on the **Class** button and it should say "Generic (Plain)". If it does not, you need to go to the

Micro Florist's Setup menu, go to Environment Setup, go to Printer Configuration, change the "Enclosure Card" printer to "Generic". The system will then add the Generic Printer with EMPTY control codes (which is what we need for the Generic Printer Codes).

## Enclosure Card Font

The Visual Ticket system allows you to select a specific card message Font, and then match the Enclosure Card message entry font with the printer font used to print the card message. This is important to insure that the visual Representation of the card message will match what gets printed (as far as the message format, line spacing, and the location of the signature is concerned).

Please close the Print Jobs definition form, and return to the Local Connection's Print Tab. There will notice a Font name selected for the enclosure card message, and a "Select" button.

When you click on the "Select" button for the "Enclosure Card Font", the system activates the Font Selection dialog box, allowing you to select a specific font. Fonts that are shipped with Windows are really not that fancy. You may want to install a graphics program (such as Corel Draw, Micro Graphics Designer, or Print House), or purchase a specific font for this purpose. Obviously you want a fancy script font that can give the impression to the Recipient that the card was hand written.

Once you install the Font, you may then select it for the Enclosure Card message. Now if you open the order pad and go to the Enclosure Card form, you will notice that the font is being used for entering the card message.

Whenever you do a download of the latest version of the Visual Ticket system, all standard Visual Ticket templates are over written with their latest versions. In order to "keep" a modified template, you need to copy that template as the User Modified version of that template. In other words, User Modified templates are not over written by installing Visual Ticket updates.

In order to simplify this procedure, you will notice a "Copy" button for the Visual Ticket template of Enclosure Cards.

Once you click on this button, the template that you have selected (which contains the specific font for the card message) will be copied to a User Defined version of this template automatically, and will be kept in a safe place.

# NOTES

# Appendix -2

**Recommended read for:**

1) System Manager

## Accessories

The final section of the Local Connections setup has to do with how each individual work station is connected to POS Accessories such as Instant Approval (Credit Card authorizations subsystem), the Mercury Direct Interface, Bloomlink Interface, Dove Interface, the Caller-Id subsystem and so on.

Obviously the setup of each accessory depends on whether or not the specific accessory is available or is to be installed on each work station.

Please see Chapter 1 for the terms and conditions pertaining to Paid Services. Please see System Manager Chapter for discussion on which Gateway is best suited for your operations. We will not be repeating those discussions here. Instead we focus on their Setup procedures.

## Instant Approval Setup

Once you receive an email from VT Support, indicating your gateway has been setup and you are provided with your User Name and Password (to logon to your Gateway account), you are ready to setup Instant Approval.

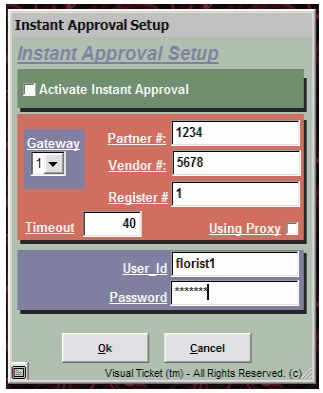
But, since each gateway has a different setup procedure, and these procedures change from time to time by changes made to Gateway websites, we recommend that you:

- Follow the instructions provided on the email.

### Using Instant Approval

To setup each station to obtain credit card authorization, please access Local Connections on that station, go to the Accessory-1 Tab, and click on the "Setup" button in the "Instant Approval" area. Enter the values corresponding to each field, and we are done!

Now, in order to test Instant Approval and verify that the gateway has been setup properly, please make sure your Network's Internet connection is in place, open the order pad, enter a test order for a dollar, paid by credit card, click on the "Now" button in the "Payment" form and verify that the system can obtain the authorization.




In order to manage your Merchant Account, view and/or print transaction listings or credit card summaries, delete/modify the current batch, and to perform the end-of-day settlement, we will also provide you with a website address that you can access using the same User Id and password, as above.

By accessing your secure gateway website, you can do all of these functions, from any computer connected to the internet. For example, you can view the list of credit card transactions in real time, while you are sitting at your office or from your hotel, while out of town or on vacation.

Please note that Instant Approval belongs to the "Paid Services" class of Visual Ticket products with the associated Transaction fee and the monthly minimum quantity requirements. Please see "Paid Services" discussed in Chapter 1. Please review System Manager Chapter for options on which gateway to use.

## Flora-Credit Server (using ICVerify)

Please exit Visual Ticket system and install the ICVerify application.

If you don't want to overload your VT Server, You may use one of the Visual Ticket POS stations to install ICVerify on. However, the POS station that becomes Flora-Credit server, may run VT at 2/3 of the original speed (depending on how fast your hardware is). So, if you decided to do this, select one of the VT stations that will not be use as heavily as your main POS system.

### Installing ICVerify

If you have purchased the Flora-Credit (Credit Card Agent) then it needs to be setup on each station. But, before we do the Visual Ticket setup, we have to install and test the ICVerify system. ICVerify is shipped, with the original CD and user's Guide.

- Follow the installation and setup procedures contained in the accompanying booklets. As mentioned in the "Quick Setup Guide" insert the CD and follow the installation prompts.
- In the Programs folder, locate ICVerify shortcut, activate the ICVerify Setup program. Once you enter the information obtained from your Credit Card Processor (Bank), you would then need to call ICVerify Support and obtain the necessary "Validation Code". This procedure is available in step by step details

in the "Quick Setup Guide" booklet. When in the Setup program, make sure you go to the Merchant Setup, and fill your shop information.

- Please make sure the "Evaluated Response" or "SDK Response Type" (in most recent versions of ICV) parameter is set to "B" (for Background).
- Review the "Reference Guide" booklet, and then run a test charge for each card type, and obtain a settlement. You should then copy the Shortcuts to the Windows desktop.

### How does it work ?

Now that we have successfully installed the ICVerify, next we must LINK ICVerify with Visual Ticket. The manner in which Visual Ticket interfaces with ICVerify is via "File Transfer" mechanism.

Each VT station generates a "Request" (REQ) file and copies it to a "Central" Request Directory. ICVerify running on a certain station on the network, keeps an eyes on this central folder and once every 3 seconds it picks up any REQ file that may be sitting there.

ICVerify will then batch up all the REQ files (if there are more than one during the 3 second period) and sends them to the Processor (Bank). Once the authorizations are obtained, ICVerify generates an ANS (Answer) file for each calling station. The station picks up it's own ANS file, decodes it, and places it into the order.

### Setup ICMulti

- Use Windows Explorer and locate the file "Icmlt32.exe" (let's call this IcMulti) in the ICVerify folder. ICMulti is a special version of ICVerify that runs in the background. Please make a shortcut for it (by right clicking on the file name). Then Drag and Drop the shortcut onto your Windows Desktop. In order to start the "ICVerify Network Authorization" program automatically, you must also copy the shortcut to your

  c:\windows\start menu\programs \startup

- Double click on this shortcut. Specify "c:\sms\comm\icn" for the "Request File Path". You must also enter "/OX" (do not put in the double quotes) in the Initialization String. Now, click on the "Initialize" button. This will start the ICVerify Network Authorization process.
- Right lick on the shortcut, go to Properties. Go to the "Command Line" and at the end of the string add "/A" (do not put in the double quotes). This will tell ICVerify to start the Network Authorizations with "Automatic Initialization" (otherwise, you would need to click on the Initialize button every time you start it).
- Now on each Visual Ticket station, go to Local Connections. Go to "Accessory-1". Verify that the "Central" Request Directory matches what you specified in the above paragraph. For example, if IcMulti is running on the Server, then on the Server, you would specify the local drive, while from a station you would specify the **S:** drive making the Central Request Directory

  s:\sms\comm\icn.

- Just remember to quit IcMulti before you run ICVerify. At the end of each day you would quit IcMulti , start ICVerify, perform the "Settlement" and print your Settlement report.

## Setting up the Flora-Credit Server

This step needs to be repeated on all POS stations.

In Local Connections, under Accessory_1 tab, The Flora-Credit Server needs to be setup to work with the ICVerify.

- Check the Flora-Credit Server Mode checkbox. Uncheck this box only if you are using the Flora-Credit in a Single-user mode on one station (referred to as the Integrated mode).
- Drop down the Disk selection control, and select the Disk Id of the system that is acting as the Flora-Credit Server. As mentioned above, this disk needs to be shared, and mapped on every station. We recommend using the T: drive for this purpose.
- The system displays "T:\sms\comm\icn" as the Request Directory. This is the default directory Visual Ticket will use to communicate with ICVerify. If for any reason you require a Interface Directory other than the default directory, you can then simply type it in the field labeled "Request (Server) Directory" field. At this point the system creates the directory if it does not exist.

### Number of Users

The default number of "simultaneous users" for ICVerify Windows version is 4, while for the DOS version is 8. You can call ICVerify directly and increase the number, if you wanted to, but Visual Ticket handles the request files in manner which the 4 (or 8) positions are used quite efficiently, without the need to increase this number. When 4 simultaneous users are requesting Authorizations, the 5th user will be put on hold until a position opens up. To specify whether you are using the "4 User" or an "8 User" ICVerify License, simply click on the line that

specifies he number of ICVerify Simultaneous Users, to have it indicate the correct value. It is important to note that if you have a 4 User License but specify 8 Users, any request above the forth, will be ignored by ICVerify. On the other hand if you have an "8 User" license, but specify "4 Users", you will not be taking advantage of the 4 additional open positions, during peak times.

Once you have selected the Flora-Credit Server Disk, click on the "**Test**" button. This will check the target drive to insure that ICVerify has been installed, the Data directory has been successfully created, and the system can both read and Write to this drive.

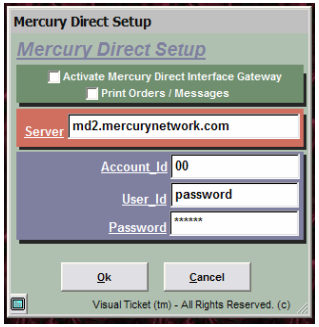
The "**Cleanup**" button is available, and should be used to "cleanup" residual files left by ICVerify due to incomplete transactions. It is a good idea to use this button once every 3-4 months just to make sure open positions are not used up by residual files. This button will clean up any unused Request, On Hold, and Answer files left behind by ICVerify. Do not use when stations are actively obtaining credit card authorizations.

## Installing Mercury Interface

When it comes to Mercury Interface, Visual Ticket is proud to be the first (and so far, the only) independent Floral Software vendor that offers both the Mercury Direct as well as the Mercury 3000 Interface Agents.

The Mercury Direct is indeed State-of-the-Art (totally Web-based) Floral Order Transmission system (offered by FTD) that leaves all other Order Transmission systems (like the M3000, Dove, and Bloomlink) behind.

### Mercury Direct Interface Agent




Setting up the Mercury Direct Interface Agent (MDIA) is as easy as entering your "Gateway Access Parameters" (as shown on the right window), connecting your computer to the Internet, and Bingo!, you are ready to send, receive and print your Mercury Direct orders/messages directly from Visual Ticket. That's it.. Please make sure the Server address is: md2.mercurynetwork.com

#### Setting Print Job

Since the MDIA will be printing all Incoming MD messages, we need to assign a printer for this particular Print Job. On the station scheduled to launch MDIA, go to Local Connections, go to the Print tab, click on Print Job Access button, then click on "Mercury Direct" print job. For the Basic format, click on the "Select" and select the appropriate printer.

#### Get the Password

The MDIA implementation allows you to send all your administrative (ASK, GEN, CAN, ….) messages using either the Mercury Direct website directly, or the Mercury Direct Terminal (aka Control Panel).

**NOTE** If you choose to use the Mercury Direct Terminal for sending "Administrative" messages, you need to :

- Install the Mercury Direct 4.0.3.4 (or later) CD on a station (usually the VT Server).
- Go to the Mercury Direct Edit menu, click on the "**Processing**" tab.

- Call Mercury Direct Support at the phone number displayed on the screen and obtain the necessary password.
- Then enter Interface Id = 10 and select the option for

  Do not confirm receipt of incoming orders and messages.

This will prevent the MD Terminal to interfere with the Sending/Receiving of orders by the MDIA.

### Mercury Direct on ALL stations?

Please call Mercury Direct Support for assistance with configuring the Mercury Direct Terminal for network use (to run it on more than one station). The advantage of having the Mercury Direct Terminal available on all stations, is that you can send Administrative messages on all stations and look up recipes and florists.

### Multi-Shop operations

The Mercury Direct Agent sends ADMIN messages (such as ASK, GEN, ....) to the designated Division (Branch Shop) Printer, based on the Shop Code of the Receiving Shop, specified in the Admin message.

This feature is referred to as the "Auto-Distribute" feature and it applies to both Orders as well as Admin messages.

Once the receiving shop code is identified in the order (or the Admin message), the order (or message) it is distributed to the corresponding Division number (based on your Wire Service setup in Setup Manager). Then, once the Division is established, the Destination Printer is chosen based on your Local Connections settings for the Mercury Direct Print Job.

## Sending Delivery Confirmation (ANS)

The Mercury Direct Interface Agent maybe setup to send Delivery Confirmation (ANS) messages for Wire-In orders that have been stamped as "Delivered" in the Delivery Tracking utility.

The sending of Delivery Confirmation to the Sending Florist is fully automatic and these messages are sent IMMEDIATELY after the Wire-In order is SUBMITTED and stamped as Delivered.

- To activate: Please go to **Setup** menu, go to **Local Connections**, go to **Acc-1** tab. click on **Mercury Direct** button. Now check the checkbox labeled "**Send Delivery Confirmations on Wire-ins**".

Once you have checked the above checkbox, then starting from that point forward, FTD Wire-In orders (that have been Submitted and stamped as "Delivered" in Delivery Tracking), will automatically get the "Delivery Confirmation" message sent to Sending Florist during Mercury Agent's NEXT cycle.

The Mercury Agent will also print the "Delivery Confirmation" message (which is an ANSWER message with the ASK_ANSWER_CODE tag set to "C"). The ANS message has the Recipient Name and Phone#, as well as the Delivery time, and the Driver's Notes.

You also have the option not to print the Delivery Confirmation messages (sent on your Mercury Direct Wire-In orders). To stop the printing of Delivery Confirmation messages uncheck the "**Print Delivery Confirmations**" checkbox in Mercury Direct settings page in Local Connections. Of course, this will still send the Delivery Confirmation message, but will no longer print it.

### Managing Delivery Confirmation (ANS) Messages

Mercury Direct's "Delivery Confirmation Status Management Utility" is available in the Setup Manager's **Misc.** tab.

- You can check / change the STATUS of these messages by entering Confirm =1 (in order to SEND Delivery Confirmation message for previous orders) or Confirm = 0 to IGNORE and NOT send the Delivery Confirmation message for each order.

Please note as a Paid Service, Delivery Confirmation messages (like Wire-out, Wire-In and REC messages) count toward of the Paid Service's monthly quantity and monthly minimum.

### The Alternate Mercury Agent

If for any reason you require an "Alternate" means of accessing the Mercury Direct Network, we are happy to announce that the "Alternate Receive Only" Mercury Agent is now available.

So, If for any reason you are having problems accessing the Mercury Direct via the STANDARD Mercury Direct Agent ((which is both Send & Receive) then the Mercury Agent reverts to a "Receive Only" agent (or as we call it, the "Alternate Mercury Agent").

Please consult the Visual Ticket (or Floral Systems) Support to help you activate the "Alternate Mercury Agent" when / if needed. Please note there is no additional charge for this activation.

The rates and Monthly Minimums for the Paid Service remain the same whether you use the full featured "Mercury Direct XML" Agent or the "Alternate Receive Only" Agent.

## Installing the Dove Agent

Please call Teleflora Technologies for the latest version of the "Dove" system. CD. We recommend that you use either a standalone computer for the Dove system (one that does not run Visual Ticket) or one of your Visual Ticket stations that will be used less often than the other ones. The reason being that once the Dove system activates the "ProComm" File Transfer Utility, it will slow down whatever application that runs in the foreground (unless you have a super fast computer). Please install the Dove 5.0 CD by following the installation instruction that come with the CD.

To turn on the Dove's Foreign Systems Interface; from the Dove main menu, click on "Maintenance". Then click on "Systems Settings" tab. This page will appear grayed out. Please type the necessary password to unlock the page. We have recently removed the password from this book due to Teleflora's request. Please call us, or better yet, call Dove Support to get the password, verbally. Once you enter the password, press "Enter". The page will now be activated. Change the "Foreign Systems Interface" line from "No", to "Yes". Click on "Save Environment Options" button. Restart the computer.

Once the above procedure is performed, Dove system will create the necessary Foreign System Interface folders and directories. Now that you have installed the Dove system, send and receive a few "Manual" orders entered from Dove Main menu, to make sure your Dove system is operating correctly. Now, we need to share Dove System disk drive and map it across the Network (lets assume as the O: drive).

Now on the station that will be running the "Dove Agent" (the Visual Ticket station that will provide the connection to the Dove system) go to Local Connections and click on the "Accessories-2" tab. There you need to specify the Network Drive letter that has been assigned to the Dove system (in the above example we will use O: drive).

Please note that if the Dove Agent is running on the same station that runs the Dove system, then you need not map the Dove disk drive, and should simply use the "C: drive" for the Dove Drive specification.

Once the connections are made, you need to go to the Agent Launcher and click on the Dove Agent Setup button to setup the Dove Agent parameters. There you will assign the Station Number that is supposed to launch the Dove Agent, and check the "Include in Auto Launch Sequence" checkbox.

If you noticed that the Dove Agent is not being automatically launched during station's startup sequence, then please check the "Local Connection's Startup Action" control, and select #5 (Launch Assigned Agents).

### Incoming Dove files

You can save a backup copy of all Incoming Dove files, the folder:

c:\DoveNet\Receive\VT_BU

You can enable this feature by going to **Local Connections**, click **Acc_2** tab, and click the checkbox: "**Make Backup of incoming files**".

- Please enable ONLY when necessary for purposes of Tech Support and Troubleshooting. Leaving the feature on for long periods of time would place too many files in this folder.

## Installing Bloomlink Agent

Please call 1-800-Flowers (Bloomlink Dept.) for the latest version of the "Bloomlink Client" CD. We recommend that you use either a standalone computer for the Bloomlink system (one that does not run Visual Ticket) or one of your Visual Ticket stations that will be used less than the other ones.

Install the Bloomlink Client CD according to the instructions that come with the CD. Please call Bloomlink Technical Support regarding any questions on the installation. Please note that the Bloomlink Agent will expect to pick up the files from the following Directory on the Bloomlink system C:\BloomPos\Visual_T

It is important that you specify the above folder (directory) when setting up the Bloomlink Client CD. Once the Bloomlink Client is installed, share it's disk drive and map it across the Network (lets assume as the L: drive).

Now on the station that will be running the "Bloomlink Agent" (the Visual Ticket station that will provide the connection to the Bloomlink system) go to Local Connections and click on the "Accessories-2" tab. There you need to specify the Network Drive letter that has been assigned to the Bloomlink system (in the above example we will use L: drive).

Please note that if the Bloomlink Agent is running on the same station that runs the Bloomlink system, then you need not map the Bloomlink disk drive, and should simply use the "C: drive" for the Bloomlink Drive specification.

### Incoming Bloomlink Files

You can setup the Bloom Link Agent to make a BACKUP copy of all the Incoming files (before the Agent starts it's importing functions). These files are generated by the Bloomlink Client application.

To enable this feature, from Local Connections, click the **Acc_2** tab, and in the Bloomlink section, check the box "**Make Backup copy of incoming orders**".

This will provide a reliable method to monitor and verify the "hand-off" between the two different applications (the Bloomlink Client and the Bloomlink Agent), as far as incoming orders are concerned. For example, if an incoming order is missing in the Order Pad, you may look at incoming files in the Backup folder and see how many files were deposited by the Bloomlink Client for the same time period.

To view the Backed up files, click the "View" button in the Local Connections (also available in the Bloomlink section). Then click on the folder VT_BU to view the files. To see the "dates" of the files, click on the View menu (in Windows Explorer), and select "Details".

Please note that when/if you enable this feature, make sure to turn it back OFF when no longer needed. This is because of the Quantity of files that will accumulate in the Backup folder after a few months.

### Tracking Imported BL Orders

The "Track" button (right below the View button) allows you to check the above incoming files (generated by Bloomlink Client) to the actual the orders imported into the VT Order Pad (by the Bloomlink Agent).

The Browse window allows you to view the Date/Time stamp, the BL Sequence # and if you DOUBLE CLICK the Memo field, you can see the FILE NAME of the order.

## Setting up the Agent

Once the connections are made, you need to go to the Agent Launcher and click on the Bloomlink Agent Setup button to setup the Bloomlink Agent parameters. There you will assign the Station Number that is supposed to launch the Bloomlink Agent, and check the "Include in Auto Launch Sequence" checkbox. If you noticed that the Bloomlink Agent is not being automatically launched during station's startup sequence, then please check the "Local Connection's Startup Action" control, and select #5 (Launch Assigned Agents).

Please note that the Bloomlink System Interface currently supports "Incoming Orders" only. This means unlike Dove or Mercury, you can not use the Bloomlink Interface to "Send" wire orders.

## Wire-In Reporting

According to Bloomlink documentation, only AFS orders coming through the Bloomlink system will be automatically reported to AFS. All other orders need to be reported using the Micro Florist Periodic Wire Reports. For this reason all AFS orders coming through the Bloomlink Interface are tagged as "Electronic Delivery" (with the Mercury Tag "~"), such that these orders do not print in Wire-In Reports. Orders from FTD, or Teleflora will print in Wire-In reports as usual.

### Bloomlink Direct Pay

If your shop is on "Direct Pay" schedule with 1800-Flowers, orders coming from the Bloomlink system will have Wire Service Code # 6 (Direct Pay). In order to capture these orders properly, you need to follow the steps listed below:

- In Visual Ticket, go to the Setup menu, access the Setup Manager, and go to Wire Service Setup access button.
- Click on the «Add» button to add a new Wire Service.
- Enter Division #1 and then use 180 for the Wire Service Id.
- Setup all other parameters in the Wire Service setup accordingly.
- You may want to use 99999999 for Code format, and disable «Digit Checking».
- Please make sure you enter the correct «Florist Code» assigned to your shop by 1-800Flowers here as well.

# The Caller-Id Manager

The Caller-Id subsystem includes the Multi-Line Adapter (MLA) which is connected to your phone lines (up to 6 lines per adapter), before your phone lines are connected to your shop's PBX system. The MLA is then connected to one of the work stations on the Local Area Network (LAN) that will then act as the Caller-Id Manager (Server) system. The communication between the MLA and the computer is done via a Serial Cable through one of the COM ports on the system.

You can have up to 12 lines monitored by using 2 Caller-Id Managers, each one connected to an MLA box. The first Caller-Id Manager will monitor lines 1 though 6. The second Caller-Id Manager will use an "Offset" parameter (equal to the number 6), which will then set it up to monitor lines 7 through 12. The second Caller-Id Manager can reside on another station on the network (so that you will have 2 Caller-Id servers). For the second Caller-Id Manager you would need to add the following 2 parameters to the Windows Shortcut command line.

The installation of the MLA must be performed by an experienced Telephone Technician. The MLA receives the phone lines in a Y fashion, where the lines going to the PBX system, are also branched out to the MLA. Once the MLA is installed, the Serial Cable is then connected to the computer.

The system that is designated to act as the Caller-Id Manager will be running the CID Manager application on another (background) window.

## Installing the Caller-Id Manager

Insert the CD into the CD Drive. Start the Windows Explorer, and select the CD Drive. Locate the Directory on the CD entitled Caller-Id. On the right hand side, locate the SETUP.EXE file. Double click on this file to run it. The Caller-Id Setup Wizard will then install the Caller-Id Manager software on this station.

When installing the Caller-Id Manager, the "Target" directory must always be the

```
c:\sms\cid\
```

directory. Obviously, if you are using a different disk drive, then go ahead and substitute the appropriate disk drive for the Target Directory, but always maintain the same `\sms\cid` folder.

The Setup Wizard will create a shortcut under the Programs Folder. You may decide to copy the Shortcut on to the Windows Desktop. You may use the procedure contained on the CD's Read-Me file to copy this shortcut to the Windows main Desktop (procedure is outlined under "Additional Steps").

The Caller-Id Manager defaults to COM port #2 for it's connection to the MLA. If you are using another COMM Port, you can change the default by changing the Shortcut and passing the COMM Port number as a Parameter. Here is the procedure to change the Default COMM Port:

Find the shortcut, right click on it. Go to Properties, select the Shortcut tab, and add the COMM Port number at the end of the Target line. For example

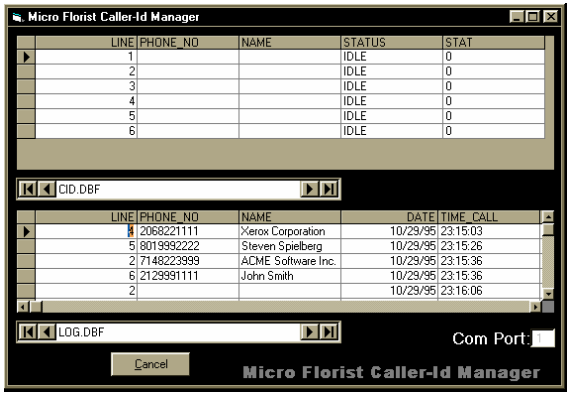
```
c:\sms\cid\CallerId.exe 1
```

will enable COMM port #1.for communication between the computer and the MLA.For the second Caller-Id Manager that will monitor lines 7 through 12, please add the following 2 shortcuts:

```
c:\sms\cid\CallerId.exe 1 6 t:\sms\cid
```

The number 6 is the "Offset" telling the Caller-ID Manager to monitor lines 7 through 12, and the "t:\sms\Cid" is the CID folder of the first Caller-ID Manager (so that both Caller-Id Managers update the same Caller-Id tables).

## Running the Caller-ID Manager




If the Caller-Id Manager is installed on a Standalone (not a VT POS system), then the Caller-ID Manager can be started by clicking on the Shortcut (mentioned above), every morning (at the same time you would start the Flora-Credit Server).

However, if the Caller-Id Manager is installed on a VT station, then it can be setup on the Agent Launcher for that station, so that it is automatically launched every time VT is started on this system. In this case, you would not need to start the Caller-Id Manager, It will be launched automatically. See the Agent Launcher and click on the Setup button for the Caller-Id Agent, to schedule the automatic launching of the Caller-Id Manager.

Once the Caller-Id Manager is running, call the shop using a number that transmits Caller-Id information. The Caller-Id Manager should show the calling number after the first ring. Please note that some phone companies do not transmit Name of the caller as part of the Caller-Id information. Contact you local phone company for further information.

## The Caller-Id Interface

Drop down the Disk Selector to specify the Caller-Id Manger disk Id. Please note that the Disk for the Caller-Id Manager station should have been shared and mapped on all stations. We recommend using the L: Drive for this purpose.

Once the Disk Id has been selected, click on the "Test" button. The system will verify that the Caller-Id manager is indeed installed on the target drive, and the system has Read/Write access to that drive.

## The Auto-Dialer Interface

The Auto-Dialer subsystem is a Local resource on every POS station. As such, it does not require a Server. However, based on this architecture each system would require a modem to perform the dialing. Also, each modem need to be connected to the phone extension of each Operator. This may, or may not pose a problem for some shops depending on configuration of their internal PBX system. Please consult with a telephone technician to see if the Auto-Dialer implementation is possible.

Once the modem is connected to each extension, you would then specify the COMM Port designator and enter the dialing prefixes necessary for dialing an outside line, or long distance calls.

Is it worth it ?. Yes, we definitely think so. When you examine VT forms, you will notice almost every entry for a phone number (Customer, recipient, florist, etc.) can be dialed by a single mouse click.

## The Auto-Fax Interface

In order to fax Wireout orders to filling florist, or to fax Error Reports directly to Visual Ticket Tech Support, you need to first setup your **Windows Fax** subsystem (if you have not already done so).

To setup your fax system, from the Start menu, select "Run". Type "Write" in the "Open" field. The System brings up the Microsoft "Word Pad". Type something, then select Print. For Printer, select "Microsoft Fax", and follow the prompts until you can fax the stuff you have typed to your fax machine. From now on, you fax system is ready to fax any error report that may be issues, but you can also use the Auto-Fax feature on the Wireout form.

## Florist Directory Extensions

The Micro Florist Professional Edition CD contains Florist Directories for FTD and Teleflora. These directory files are required to be updated at least once a Quarter (every 90 days), based on the bylaws and rules enforced by the Wire Services.

| Files | # of Records | Installed | Expires | Days |
|---|---|---|---|---|
| FTD | 82699 | 06/30/97 | 08/14/97 | 0 |
| AFS | 95854 | 06/30/97 | 08/14/97 | 0 |
| TEL | 20762 | 06/30/97 | 08/14/97 | 0 |
| RED | 13300 | 06/30/97 | 08/14/97 | 0 |
| CAR | 6235 | 06/30/97 | 08/14/97 | 0 |

In order to find out the existing extension for each one of these files, please access the Setup Manager, and click on the "Florist Directory Files" access button.

The column labels "Days" shows you how many more days are left before the Directory expires. The files are updated by accessing the Micro Florist Online BBS system, and once downloaded, they are automatically installed. Directory Downloads are available via the Visual Ticket's Internet FTP site. In this mode, the downloading and the installation of Florist Directory files are fully automated, and there are no "connect charges" since download is done via the Internet. Florist Directory files available via the Internet contain both the "main" as well as the "also Served by" listing. Internet download is provided as part of the "Standard Support" plan.

Prior to download, please verify the status of your "Technical Support" membership, available on the Setup Manager. To initiate download, click on the "Download" button. System will automatically determine which files need to be updated, and it will download all the necessary files, in the background.

- Once the Internet Agent is done, please access this form again, and the system will automatically install the files. Do this by accessing the Setup Manager again, and going back to the "Florist Directory Files". As soon as this form is activated, it will notice the newly downloaded files, and will prompt you to start installing them. Please note that while the Server is preparing and indexing the Directory Files, you should not be using the Florist Directory on any station. So, it is highly recommended that the second part of this procedure (accessing the form to install the downloaded files), be performed during after hours. Once the File Preparations are complete, you will see the Directory File Extensions are updated, and the column labeled "Days" will show the new files have 90 days of remaining extension.

# Appendix -3

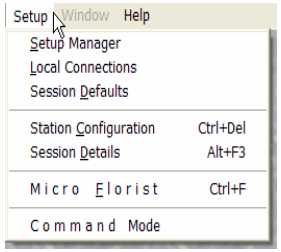
**Recommended read for:**

1) System Manager

## System Setup

### VT Setup Levels

Visual Ticket setup is has the following 4 different levels.




#### Local Connections

This level specifies Work-Station specific setup parameters. It is controls how each computer is connected to different resources on the Local Area Network. You can access Local Connections setup from the **Startup Utility**, as well as on the VT **Setup Menu**.

#### Global Parameter

This level specifies Shop specific parameters. Any parameter that is setup at this level will affect all work stations and all sessions. These parameters include Tax rates, drop down defaults, Environment Parameters, etc. You can access the Setup Manager from the VT **Setup Menu**.

#### Session Defaults

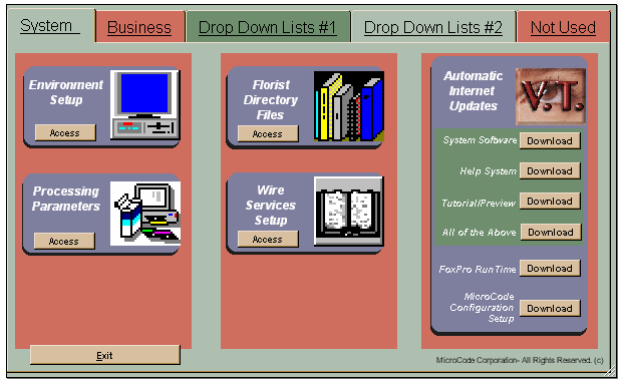
This level specifies the behavior of the system based on the Station # and Staff Id logged on to each work station. Since Session Defaults are "Staff" specific, you can setup session defaults such that the system behaves per the requirements of individuals and departments. These parameters include Novice/Expert modes, Windows/DOS key stroke behavior, Address and phone number defaults, Prompter contents, etc.

Session Defaults are portable between work stations, depending on the Station # and Staff Id used during Login. You can access Session Defaults for the "Current Session" from the VT Setup menu. The Prompter setup for the "Current" session is accessed from the Administration menu. You can also access the Session Defaults and Prompter setup for all sessions, from the System Monitor Agent.

#### Agents Setup

Agents are setup globally (for all stations) using the Agent Launcher from any station. The Agent Launcher is available from the Agents menu. The Setup Form for each Agent is accessed by clicking on the setup button next to each Agent's name, on the Agent Launcher.

### The Setup Manager




After you have completed the "Local Connections" for each station, we are ready to setup the Global Setup Parameters for the entire shop.

The Setup Manager is activated by accessing the Setup menu (from VT's Main menu). The Setup Manager controls components and parameters that affect the entire shop, and all stations. There are many areas that control the default values for all dropdown boxes, customer setup defaults, processing parameters and so forth that should be looked at, and not necessarily changed when implementing the Visual Ticket system.

We will now outline the areas that need to be setup first. Then we will list those areas that need to be looked at, and maybe changed, only if necessary.

For Wire Services setup, please see Wire Services Chapter.

# Delivery Zones / Frequent Addresses

Click on the **Access** button for "Delivery Zones" or "Frequent Addresses" setup. The system opens a form containing a grid with sample Delivery Zones. From the Option box select either "**Delivery Zones**" or "**Frequent Addresses**".

- Please note that when accessing "Delivery Zones", the grid is sorted by the "City" name, in "Frequent Address" mode, it is sorted by "Company / Place" name.

Click on the exiting records, and change them as necessary. Once you have changed all existing records, click on "**Add**" button to add additional Zones / Addresses.

## Display an "Address" indicator

In cases where you have multiple ZONES with the same ZIP CODE and you would like to be able to distinguish among these different zones based on some sort of "ADDRESS" identifier, use the following feature;

- When setting up Delivery Zones (in Setup Manager), you can enter an "address" indicator for that zone.
- During Order Entry (when in Combined or Deliv forms) clicking on the Zones button, now displays the ADDRESS indicator you entered in previous step for each of the Delivery zones.

The Address1 and the Address2 fields are saved "separately" into the Freq. Address Database. When adding a Company (or a Place) to the Frequent Addresses database (during order entry using the Combined or the Deliv forms), and the Company (or Place) already exists in the "Freq. Address" database, then operator is prompted to either;

- Select YES, to add the same company (or place) again (so there will be 2 or more entries).
- Select NO to not add it again, but instead update the existing Company (or Place) with the current address.
- Cancel and do nothing.

## Delivery Services Setup

In order to add/change;

- Delivery Services (ie; Your Shop Van, Delivery Pool, etc.)
- The Default Delivery Charge and/or
- The Taxable / Non-Taxable status of the Delivery Charge

for each Delivery Service, click the "**Deliv. Services**" button located on bottom of the Delivery Zones form.

The function prompts you to add any of the missing Delivery Services #1 thru #9 (filling in the missing numbers in between) before it opens the Browse window. Then it lets you change each Delivery Service's Name, the Delivery Charge for the service, and the taxable/non-taxable status of the Delivery Charge.

- You can also press Ctrl-T to DELETE any of the unwanted Delivery Services.

## Canadian Delivery Zones

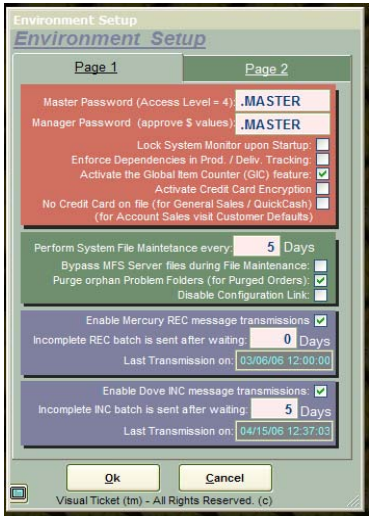
Since in Canada, you use a 6 character Postal Code (as opposed to 5 numbers in the US zip codes) and practically each Street Block has it's own Postal Code, you may use the following method to accommodate Canadian Delivery Zones.

- The system recognizes that you are in Canada by the shop address you have setup in each station's Session Defaults.
- Use the first 3 characters of the Postal Code (such as V7V for West Vancouver) to setup your Delivery Zones.

This allows you to breakdown a whole city to reasonable quantity Postal Code sections (zones). During Order entry the "Automatic Delivery Zone Update" feature uses the first 3 characters of the Postal Code to perform those functions.

So for example, if the Customer's Postal Code is V7V-1W3 and you have setup a Delivery Zone of West Vancouver with Postal Code: V7V (with Delivery Charge of $12.00), the system locates that Zone and automatically updates the Delivery Charge and the Driver assignment.

# Environment Setup




## The Master Password

This is the password necessary to grant level four access privileges, regardless of the staff Id used during the Login procedure. This password is also required to authorize System Manager level tasks such as Deleting all the orders in the central Order Pad, or accessing sensitive areas of the system.

The Master Password can also be used in place of ANY employee password during the login operation.

## The Manager Password

This is **a** lower level password (than the Master Password), mostly used for approving "Money Matters" (such as Credit limit increases and so forth).

- The Manager Password in Access Level =3 produces the same results as the Master Password does in any other level.

So, you may give the Manager Password to your Manager who is setup to access the system with Access Level = 3. She will now be able to access all areas that require the Master Password (but she will still not be able to access the areas that require Access Level = 4).

Please note that when employees logon with "Level 1 Access" level, they are not authorized to override Credit Limits, or Customer Discounts, and so on. It is in these situations that the system prompts for "Supervisor Override". You can then either use the "Master Password", or the "Manager Password".

In other words, you may want to give this lower level password to the Supervisor (for approving credit limit overrides), while not giving him/her total access (which he/she will gain by knowing the "Master Password" above).

## Bypass Password Checking

If you have a secure environment and wish to bypass password checking all together (providing OPEN access to all sensitive areas of the system), you may enter BLANK for the Master Passwords on this form.

As mentioned above the Master Password can used in place of ANY Employee Password during Login operations. However when you enter BLANK for the Master Password, it will no longer affect the Login operations.

In other words, you can Bypass Master Password checking, but that will not affect (or bypass) Employee Logins and passwords.

## Deletion Control Password

Please check out the "Confidential – Managing Deleted Records" page in Chapter-1.

## Lock System Monitor on Startup

Since the System Monitor controls Access Levels to the system, as well access to the Session Defaults, the Balance Utility, and other sensitive areas of the system, you can set it up so that it wakes up in the "Locked" mode. To unlock it, use the Master Password (see above.

## Enforce Dependencies

When activated, Production Tracking form (in Operations menu) lists only "Submitted" orders and Delivery Tracking form lists only "Finished" orders. Please see "Enforce Dependencies" in Production / Delivery Tracking section of this User's Guide.

## Global Item Counter

When the Global Item Counter (GIC) is activated, every item that is sold, the system will reduce the item's GIC by the quantity sold in Real Time (not when Posted).

This feature insures that items are not "over sold" beyond the available inventory, during busy holidays. Do not enable this, unless you have setup the initial counts (see the Inventory form under Administration menu), and are ready to use this feature. Otherwise the system will use valuable resources and processing time for nothing…

## File Maintenance Schedule

When using the Nightly Agent this parameter is no longer applicable, since he Nightly Agent will run the File Maintenance every night anyway. Change only when necessary.

## Delete Orphan Problem Folders

When this checkbox is checked, the system will automatically purge Problem Folders (these Problems you have attached to certain order for further follow up) once the original order is Purged.

This feature helps you reduce clutter on Problem Folders that you may have forgotten to delete. But, it can also delete an open Problem Folder, even though

this is quite an unlikely scenario that a problem folder can still be open on an order that was processed 60, 90, or 120 (depending on the Purge parameter) days ago.

If you like to keep Problem folders (in case problems can drag on for a long time), even after the original orders have been purged, then go ahead and uncheck this checkbox. In this case, you need to actually Delete Problem Folders after they have been resolved.

### REC / INC Message Transmissions

Please see Wire Services Setup in Chapter 11.

## Drop Down Boxes

At this time, we recommend that you click on Dropdown Lists #1, and Dropdown Lists #2 tabs, and simply review the available options for these parameters. The default values (factory settings) are pretty much usable, as they are. Change them only if necessary. These Dropdown lists are self explanatory, and they can be changed by simply clicking on them and changing them.

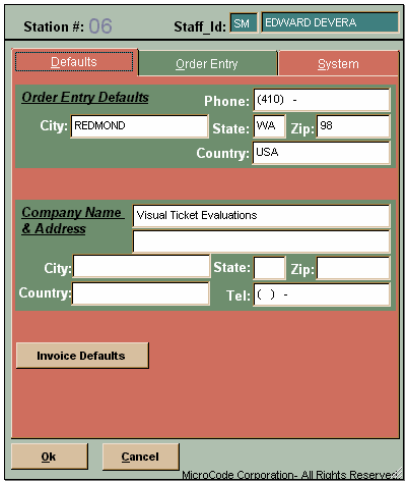
## Caller-Id Log file

If your system has the Caller-Id interface, click on the "Accessories" tab, and view the Caller-Id Log file. This is a list of all you incoming calls.

# Session Defaults

Session Id is defined as:

Session_Id = Station_No + Staff_Id




For example, when a operator with staff Id "SM" logs on to station #2, she has started Session "03SM".

Each session has it's own Session Defaults. Session Defaults include parameters that mainly control the "behavior" of the system, as it applies to the Operator preferences or the Department policies.

You can access the Session Defaults for the "Current" session, by accessing the VT's Setup menu, and selecting "Session Defaults". You can also use the "Monitor Agent" to access the Session Defaults for all session.

Using the System Monitor Agent, you can setup one Session Defaults, and then copy that to all other sessions. So, the most logical place to start setting up the Session Defaults would be by using the Monitor Agent. Once you have setup one session, you can then use the "Copy" button to copy those setting to all other sessions. You can then use the Session Defaults on the Setup menu, further fine tune the "current" session's defaults. To access different session on the Monitor Agent, click on the station # on the left column, and then access Setup button for each session on that station.

The Visual Ticket system is shipped with one session already setup for each station number. The Staff_Id is the default "System Manager" employee (the only employee in the staff database, when the product is shipped). It is recommended that you use the existing Sessions until you can add your own employees to the system (using Employee Setup on the Admin. menu). Once there are additional employees in the system, then you can add additional session for those employees on the Monitor Agent.

Access Session Defaults, either on the Setup menu, or activate the Monitor Agent, and click on the "Setup" buttons for station #1, #2, and so on. Once the Session Defaults form is opened you will notice the following three tabs:

# Defaults Tab

## Order Entry Defaults

Order Entry defaults are the defaults values used, when new records are added to the Recipient form, the Customer form, and so on. These default values are used mainly as "shortcuts". For example, when a new customer is added, you can click on the "Defaults" button, and the values setup here for City, State, and zip code will be automatically inserted to the Customer's record.

## Division Name/Address

Each Session can have a different department (Floral Department, Nursery Department, Gifts Department and so on). Enter the name, address, and phone number of the Shop (as it applies to different departments) on this form. This information is printed on Cashier Receipts, other tickets and Report headers.

The `Division Number` applies only to multi-department (or multi location) shops. Once you use a Division number other than Division #1, you need to setup the Print Jobs and Wire Services for each and every new Division No.

The `Cashier Receipt Message` prints before the "Thank You" line on both the `REC1` and `REC2` Cashier Receipt print jobs. The message is 36 characters long and must be `centered`. You may enter something like "... We Appreciate Your Business ..." or you can state your Return Policy such as: "No Cash Refunds - 3 Day Returns".

## Invoice Defaults

When printing invoices in the Billing Module, each invoice contains a FOB message, and Invoice Notes. You may click on the "Invoice Defaults" button, and change these messages as they apply to your business. You can setup these text strings differently for each session.

# Order Entry Tab

## Order Pad Scope

When opening the Order pad, you can setup a particular session to:

- Access all order on the Order pad.(default scope)
- Access orders assigned to Division #n (Department Specific orders).
- Access orders entered by this Station (simulates Local Order pad)

You may also specify that a particular session can access certain "Group" of orders based on their status:

- All Orders (default scope), Current orders (orders that matter), and Future orders (Standby orders). As well as, Orders that require Attention (Trouble Shooting session).

Please note that these are only the Default Scope as they only apply when the order pad is first opened. Any session can change the Scope, at any time by accessing the "Select" menu.

## Order Entry Options

### Status Button mandatory ?

When entering orders, does the Operator need to click on the Line-item Status button, before s/he is allowed to save the order ?.

| PROS: | CONS: |
|---|---|
| S/he can verify the Service/Delivery charge taxable status, and the amount given to the Filing Florist on Wireout items. | Adds an additional step to Order Entry process. |

### Wire Button mandatory ?

When entering Wireout orders, does the Operator need to click on the Line-item Wire button, before s/he is allowed to save the order ?.

| PROS: | CONS: |
|---|---|
| Make sure a florist is available at the destination city. | Adds an additional step to Order Entry process. Also, Wireout orders should be processed using the " Wire-Out Processing Center " facility on the Operations menu, and not while taking new orders. |

### Other Info mandatory ?

When entering orders, does the Operator need to click on the "Other Info" button, before s/he is allowed to save the order ?.

**PROS:**
This really is a very useful form. Assigning an Advertisement Tracking value, assigning Staff_Id, assigning Sales Reference value, assigning an Allocation Account, Marketing Promotions stamps, as well as changing the Sender's name on Account Sales, all require that the Operator access this form.

**CONS:**
Adds an additional step to the Order Entry process.

### Recipient Address mandatory?

When entering orders that contain the Delivery button, does the Operator need to enter the Recipient's address, before s/he is allowed to close the Delivery form?

| PROS: | CONS: |
|---|---|
| What good is a Delivery form, with out an address ?! | Requested by some shops. Apparently, they want to be able to add the Address later. |

### Sender's Name mandatory ?

When entering General Sales orders, does the Operator need to enter a name for the Sender, before s/he is allowed to save the order ?.

| PROS: | CONS: |
|---|---|
| It is indeed a valuable piece of information. What if you need to contact the customer ? | If a particular station is assigned to a high volume Cash & Carry (long lines of people with packages of seeds in their hands) business, the Sender's name, all of a sudden becomes a lot less important !. |

### Start with Account Sale ?

When clicking on the "New Order" button, would you the order to be added as "Account Sale" vs. "General Sales" ? - This is a "Business" decision, with a large impact on Customer Relations and Order Entry procedure itself.

**PROS:**
You will develop your Mailing List, and very soon it becomes a true asset. There is really not that much difference, if you don't have to enter the customer address. You can capture Customer's Sales History, Average Sale, and start entering notes with respect to his/her preferences, and have the system start collecting Special Occasions information. If you have Caller-Id Manager, then this would definitely be the preferred method. In any case, we recommend that you do add new orders as Account Sales.

Account Sale entry transfers "Address Verification" data to your Credit Card Processor, when the order is paid by Credit Card. This will classify the transaction as "Qualified Transaction" by the processor, thus reducing your Credit Card Discount Rate. This can be significant amount of money. Please consult your Credit Card Processor for rates with respect to "Qualified" vs. "Non Qualified" transactions.

**CONS:**
It may take just a few seconds longer. - You should time the minimum requirements for each method, before deciding.

### Display the Summary Screen ?

When displaying an order on the Order pad, would you like to see the Summary Screen (showing the whole order on one screen) ?. - For some folks it is important to be able to view the entire contents of the Order on one screen. Well, the "Summary" button, does exactly that, but it also makes the screen very busy !!.

For orders with multiple Line Items, you can make the "Summary Screen" display the pertinent information for that specific line item, by clicking on the first column of the grid that display the Line Item number.

| PROS: | CONS: |
|---|---|
| You can view the card message, the recipient Information, and the production information on one screen, so that you don't have to click on a button, to see the necessary information. | It makes the form look real busy. It also hides the Submit button/status. |

## Print Request Defaults

Well, sooner or later you must decide which Production Tickets you will be using. Here are your options:

Whether you use

- Delivery / Work Tickets on one Printer, and Enclosure Cards on another, or you use
- The "Combined Form" instead of all three.

Printing a separate Enclosure Card allows you to create a real nice looking Enclosure cards. The Combined Ticket's Enclosure Card looks and feels kind of flimsy. Also, when printing these forms separately you can place a Print Request for exactly what you need, and will not be wasting a whole form, for just a portion that you really need.

On the other hand, printing a combined form, will eliminate having separate pieces of paper.

Other than that, a Shipping Label needs to be printed, only if you are a Gift Basket type of business (that needs to ship its products vs. delivering them). In which case, you need to also click on Shipping Labels.

## Customize Order Entry

### Hardcopy of all Orders

As it was discussed earlier under "Setting up Print Jobs", the system give you the option of obtaining a hardcopy for every order that is entered. The hardcopy is in the form Invoice, which is printed (usually on blank paper) on a centrally located printer somewhere on the network. Check the "Invoice (order hardcopy)" checkbox if you are interested in activating this feature.

When this feature is enabled, as soon as the User clicks on the "Save" button, the system prompts him/her to print the invoice. Once the Invoice is printed, and the quantity of invoices printed exceeds zero, after that, the system will no longer prompt the User to print the invoice.

### Automatic Division Assignment

For Multi-Shop operations, depending on your business model, you may want to use the "Automatic Division (shop) Assignment based on the Recipient's Zip code" feature. In other words, when a specific delivery falls within the Delivery Zone of a particular branch, the order is automatically assigned (routed) to that shop.

You can assign a set of Zip codes (Delivery Zones) to a specific Branch (Division). Then, if Recipient's zip code matches one of the zip codes assigned to a particular branch, the Visual Ticket system automatically changes the "Assigned Division" (in the "Other Info" button) to that particular shop (Division).

To setup the Zip codes and the associated Divisions, go to the Setup Manager, click on "Business" Tab, go to "Division Names", and click on the Setup button located on the lower left corner of the form. Then enter the group of Zip codes and the Division number assigned to each zip code. To enable (turn ON) the feature on each station, from "Session Defaults", go to the "Order Entry" tab and check "Automatic Division Assignment" checkbox.

To verify, please enter a Delivery order with a Recipient zip code (that has been assigned to a specific division number).Now, click on the "Other Info" button and verify that the correct Division number has been automatically assigned to "Assigned Division" dropdown.

### Choice_2 Append Function

This option pertains to Order Entry when adding additional items to a Delivery Sale.

When adding additional Items to a Delivery item (by means of Cash & Carry sales), you have the option to "append" each Item's Information (ie; Item_Id, Item Description, Qty, and Price) to the Choice_2 field of the Delivery Item.

With this feature turned on, the Work Ticket of the Delivery (line) Item will include all the Item Information from the additional Cash & Carry items entered afterwards in the Choice_2 field.

The append function also covers previous Cash & Carry items, as well. In other words, if you enter 2 Cash & Carry items, then enter a Delivery sale, followed by 2 additional Carry sales after that (for a total of 5 items). The Choice_2 field of the Delivery line item, will have the Item Information from all 4 Cash & Carry sales.

Then if you enter another Delivery Sale, followed by 2 additional Carry sales, then the Choice_2 field of the second Delivery sale (which is the 5th line item) will have the Item Information of the following 2 Carry items (line items 6 and 7), and so on.

It is important to note that the Append function occurs during the Save process. However, in multiple "saves of the same order", the Choice_2 field is closely examined, to make sure the same information is not appended more than once. However, if you alter the information in the Choice_2 field, the same information will be appended again. So, we recommend that you don't alter the information in

the Choice_2 field, unless you intentionally want to remove an item. When you delete a line item, you need to manually erase the item in the Choice_2 field of the corresponding Delivery sale. Please note this feature does not take into account, whether or not, these items were already picked up by the customer.

To activate this option, you may check the "Append Item Info to Choice_2" checkbox on this (Session Defaults) form. Since this is a "Session Specific" feature, it needs to be activated on all Sessions running on all stations.

## Making Zip Code Mandatory

For Credit Card sales, you have the option to make the Customer Zip Code Mandatory for processing Credit Cards (please see Payment form for details).

For Account Sales, the Zip Code is automatically submitted. But for General and QuickCash sales, leaving the Zip Code field empty may increase your Credit Card fees / commissions (check with your Merchant Account provider). Thus you have the option to FORCE the operator to enter the customer Zip Code before processing the Credit Card.

To do so, please check the "**Make Zip Code Mandatory for Credit cards**" checkbox in Session Defaults Order Entry Tab. In this case, the Customer Zip code field is included in Tab Sequence and Credit Card processing is not allowed if/when it is left empty.

## Where to begin ? (tab sequence)

When opening the Payment form, you have the option to start the Focus on:

- The Credit card shortcut button (to put the amount of sale as paid by Credit Card). or
- The Cash Amount paid by the customer.

Please note that #1 is the default behavior for the Main order pad, while #2 is the Default behavior for the QuickCash order pad.

If you want the Main Order Pad to behave like the QuickCash, then please check the: "**Focus goes to the Cash Amount**" checkbox.

Now, both the Main as well as the QuickCash order pad, once you open the Payment form, the focus goes to the Cash Amount (paid by the customer).

## Credit Card Type Dropdown

The credit card Type (or Account) dropdown is not visible, by default. Instead the credit card Type (or Account) is automatically selected based on the "First Digit" of the credit card# (see Payment form).

However, if you still need to manually select the credit card Type (account), on the Payment form, check the "**Credit Card Type (Account) Visible**" checkbox in Session Defaults (under Order Entry tab).

This way the Credit Card Account dropdown is visible and gets the focus after you enter the amount under Credit card and hit the Tab key.

The **Credit Card Type** dropdown matters when your Master Card / Visa deposits are made separately (by the bank) than your Amex or Discover deposits.

## Enable Barcode Interface ?

If your VT system is configured to support Barcode Readers, then you need to make sure that this box is checked. Once this box is checked, clicking on the Line-Item Search button, will enable the Barcode Reader form.

## Enable Price Checking ?

When entering the Price of an item, the "Price Comparison" Window pops up, showing:

- Price used in Order.
- Original Inventory Price
- Adjusted Price (by the Manager)

You can then select either one of the 3 prices listed.

| PROS: | CONS: |
|---|---|
| The Operator would be able to determine the current pricing strategy, and would be able to better determine the selling price. | It opens an additional window (automatically), and may distract the Operator. The Keystroke quantity remains the same. |

## Enable Quantity Checking ?

When entering the Item's quantity, the "Quantity Comparison" Window pops up, showing:

- Quantity_On_Hand in Inventory.

- Items' Global Counter Quantity

| PROS: | CONS: |
|---|---|
| The Operator would be able to determine the available item quantity, before selling the item. Useful when the availability of items is an issue. | It opens an additional window (automatically), and may distract the Operator. The Keystroke quantity remains the same. |

## Enable Auto-Zip code Insertion ?

After entering the city, and the state (in Delivery, Customer or Wire windows) the first zip code for the city is automatically inserted. As you know, each city may have different zip codes, and the one inserted may not be the exact one, but it is close.

| PROS: | CONS: |
|---|---|
| If the inserted zip code is correct, then the operator would not have to enter the zip code. If, it is not the exact one, it is close, and only the last couple of numbers may need to be changed. | It may insert a wrong zip code and the Operator, may forget to correct it. |

It is important to note that of the "Zip code Search" button is pressed, and the correct zip code is entered, the system automatically inserts the city and the state. This feature only applies when the Operator does not click the "Zip code Search" button, or the customer does not know the correct zip code.

## Enable Staff_Id / Sold Division changes ?

The Visual Ticket system has been designed for maximum security with respect to starting and ending sessions and being able to track each session's activities, as well as starting and ending balances. If this checkbox is not checked, then the `staff_Id`, and the `Selling Division` for each session is locked, and depends on the staff_Id of the Operator who actually started the session, through a proper Log in procedure. The Staff_Id and the default Division number for each session is setup on the Monitor Agent.

To implement the maximum security scenario, each Operator must be assigned a Session (using the Monitor Agent), and while entering orders, an Operator can not change the staff Id (and the Sold Division No.) on each order. The only way to do that, would be to login as another Operator, and start another session.

Now, some shops do not require that level of security, and people walk around, and use any station that is available to enter the next order. In this case, you would not need to setup session for different employees on every station, in order to track which employee entered which sale.

To accomplish this, and loosen up the security levels by allowing Operators to change the staff_Id on each order, check this box. Once checked, each Operator can access the "Other Info" form, and assign his/her staff_Id to each order (as well as changing the Sold Division No.). It is important to know, that once an Operator assigns a new staff_Id to an order, all new orders generated after that, will have his/her staff_Id (instead of the original staff_Id who actually started the session).

| PROS: | CONS: |
|---|---|
| You can still track which Operator entered which sale, without having each Operator actually login. | The session integrity, as far as having one person being responsible for the Session's starting and ending balances is compromised. |

The ability to change the "Sold Division" number, becomes useful only when there is a need to enter orders that "`should have been entered`" in another Division. For example when the visual enclosure card template `e_card5` has been selected, changing the "Sold Division" will force a different Shop Logo on the Enclosure card.

## QuickCash Automation

Visual Ticket streamlines certain steps, and provides higher levels of automation when "QuickCash Automation" is turned `on`. To keep the Payment form consistent, there is a "QuickCash Automation" switch for each one of the order pads (The "QuickCash" order pad, as well as the "Main" order pad).

When either of the `two` "QuickCash Automation" switches are enabled, the Payment form operates in the "Quick mode". To indicate that "QuickCash mode" is active, Visual Ticket displays a little label at the bottom of Payment form, that reads "`QuickCash On (press Esc to Cancel)`". So that when you are in the Payment form, you would know what to expect. Pressing the Escape key Closes the Payment form without saving the order or opening the Drawer.

In "Quick" mode for example, the focus jumps to "right" buttons, the authorization is obtained automatically after swiping a card, and the printing of "Cashier Receipt" and "Opening the Drawer" occur automatically. It may be too fast or too structured for some people.

For more details, please review the "QuickCash" order entry in chapter 7.

## Cash Drawer Mode

You have two options for opening the Drawer, while "QuickCash Automation" is turned ON. The first option (Default) is; Drawer opens while you are in the Payment form, immediately after you enter Cash / Check amount.

The second option is; wait until you save the order. In this mode, the Drawer opens when you click on the "Save" button, right before it prints the Cashier Receipt.

# System Tab

## Data Entry Field Colors

Each session can have it's own foreground and background colors for all data entry fields. Data entry fields have the following two states. Either they are Active (the contents of the field may be changed), or they are "For Display Only"(the contents of the field can not be changed). The Active form is referred to as "Enabled" field, and "For Display Only" fields are called "Disabled" fields.

Since colors are a personal preference, the selection and display of colors are session specific. Simply click on the "Select" button for the color you want to change, and select a color from the color palette. It would be a good idea to use background and foreground colors that provide maximum contrast, making the Data entry fields easy to read.

You can also setup the Background color for the Main Visual Ticket Desktop screen. This is a Session Specific property, so you can setup a different Background Color for each Session.

Please note that if you have setup the Background Picture (in Local Connections), the Picture always covers the entire screen, so the background color is not visible, while there is a Background picture.

You are now able to setup Background Picture (bitmap) for ALL the forms in Visual Ticket. This is a Session Specific parameter so you can setup a different theme for each Employee on each station.

## Skins and Themes

As mentioned above, you can select Fields Colors for Enabled (Active) or for "Display Only" (Disabled) fields and their foreground and background colors, as well as the Skin of all the forms, all at the same place, so that you can create a session "Theme".

We refer to the "Background Picture" of each form (from Order Pad to Payment form, to Agents, … etc) as the "Skin". You can select the Skin here in the Session Defaults under the System Tab.

Since there are almost always text on Visual Ticket forms (both in light and dark colors), we suggest that you select a "Skin" (screen bitmap) that is not too dark, not too light, and especially not too busy...

If you prefer Visual Ticket's standard (ie; default) colors (with no Skin), then simply click on "Forms Background" button, but instead of selecting a file, just click Cancel.

- You can always remove the Skin (background picture) at any time on any form, by simply Double Clicking anywhere on the form.

## Novice vs. Expert modes

Once "Novice" mode is enabled, all non-essential features are masked (hidden from the User) and s/he is presented with the most "basic" user interface necessary to enter orders. The Expert (or Normal) mode is Visual Ticket's default mode. However, when training new Operators, or when you intend to use the system in it's most basic form, you may want to enable the Novice mode. Again, in this mode, the system "masks" most of it's higher level features, thus simplifying Order Entry screens.

Novice vs. Expert modes behaves very much like a toggle switch that can be mapped to each Session, as session's default mode. However, regardless of whether or not a session woke up (started) in Novice or Export mode, you can change the mode during the session.

- You can switch between the two modes, by going to the Setup menu, and activating Session Details (Alt-F3 shortcut). There you will see a small checkbox labeled "Novice Mode ?". Once you enable or disable the checkbox, the remainder of the session will be conducted under that mode.
- If you are already in the middle of an order under the Novice mode, and decided that you need access to one of the Expert (or Normal) mode features, you can simply click on the button with a "Key" icon, located on the upper left hand corner of the "Combined Ticket" (shortcut Alt-N). The advantage of this 'Little Big Button" (meaning a little button that has extraordinary power, based on Native American lingo), is that; not only it changes the operating mode from Novice to Expert (or visa versa), it also refreshes the form and presents it to you with the desired feature set in real time.

The criteria for selecting which features should be masked in the Novice mode, was based on the following principal: "Only include fields that are absolutely necessary for entering the necessary information contained in each order". Beyond that, the feature was considered "non-essential" and as a result is masked for the Novice mode.

| PROS: | CONS: |
|---|---|
| For a Novice User, s/he would not get confused with all the non-essential features (buttons) on the Order Entry screens. For an Expert user, the "Tab" sequence is shorter in "Novice" mode so it may even speed up tabbing through various fields. | For an Expert user, the higher level features are not on the screen, when needed. But then again, it only takes about a second to enable the "Expert" (or the Normal) mode. |

## Set Confirmation On ?

When confirmation is on, moving from one field to the next requires that you either hit the Enter key, or press the Tab key.

When confirmation is Off, once the field is filled the cursor automatically moves to the next field. It is important to emphasize the word "filled". In other words, is a field has a length of 10 characters, the cursor would move to the next field once the 10th character is entered. If the field requires a single entry, then it loses focus, as soon as the entry is made.

| PROS: | CONS: |
|---|---|
| For a Novice User, he/she would not get confused as to where the cursor is | For an Expert user, this can eliminate whole bunch of keystrokes. |

## Bypass "Are You Sure" ?

When changing the sale types, or deleting records, etc., the system asks for confirmation by asking "Are you sure you want to do this?". Now, this can get real old with people who use the system day in, day out.. When they want to change the sale type for example, they are already pretty sure they want to do it.

| PROS: | CONS: |
|---|---|
| For an Expert user, this can eliminate whole bunch of keystrokes, and would not alter their rhythm of order entry. | For a Novice User, he/she would may get nervous knowing whatever he/she does is final (which is some cases, may not be that irreversible anyway). |

### SET NAVIGATION MODE

Now, this one is not easy to explain!!. This has to do with, how the system moves from one field to another, or what happens when you use certain hot keys, or how you click and open different controls.

As you know, the Windows Interface is pretty much what we are all used to. So, the default for this field, is obviously using the "Windows" mode by not checking this box. If you are curious how the DOS mode behaves, go ahead and check this box, and then enter an order. If you found yourself more, comfortable then by all means keep it that way.

## Disabling Dropdown Controls

The Order pad uses two very important Dropdown controls that need to be front loaded with data the Order Pad opens up.

The first one of these Dropdown Controls is the dropdown box used for selecting Customer Account Id, when entering Account Sales. The second one is the Item_Id Dropdown list on the grid for selecting the Inventory Item.

Since these controls need to be front loaded, the system must first download entire customer file into this control, before it is able to open the Order Pad. For shop that have 50,000 customers, this will get real annoying.

Neither one of these controls are absolutely necessary. The system provides the Visual Search Engine for searching and selecting both customers and inventory items, with a single click of the mouse. So, for shops that have large quantity of customers, or inventory, these controls are removed from the order pad, when their customer quantity, or inventory quantity exceed the numbers setup on their respective controls on this page.

If you notice system response time degradation, while opening the Order Pad, you may want to decrease these numbers to eliminate these controls even sooner. Our tests have shown that the system response time continues to be satisfactory when these counts reach up to 4000 customers, and 1000 inventory items.

## Background Save

This option performs "Automatic Incremental Save" during Order Entry. The checkbox to enable this option is located on the "Session Defaults" form, under the "System Options" tab. Please note that this is a Session specific parameter and needs to be set for each Session.

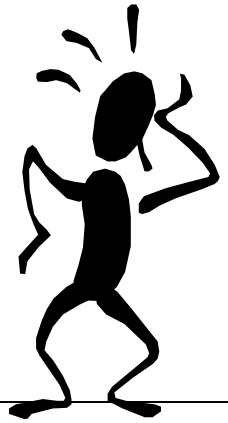
It saves the (partial) order in the background automatically, after you exit the Combined form and/or after you have completed the Payment form.

This option is designed as a temporary measure when the computer is unstable and there is a possibility of a frequent system freeze or crash. In which case, with this option enabled, there is a far better chance, that you will not lose the entire order. Of course that still depends on which part of the order, the computer actually goes down.

| PROS: | CONS: |
|---|---|
| Saves the (partial) order in case the computer is unstable and there is a possibility of a system freeze or a crash. | When enabled, you lose the ability to UNDO orders. Order Validation safeguards may not be fully enforced on partially Saved orders. |

During the Incremental Save function the Order Pad screen will flash a couple of times and the message "Incremental Save: Done" is flashed.

We recommend that you only enable this option during the critical times of fine tuning your computer to prevent the freezing or crashing. Once the Computer is stabilized, we recommend that you turn off this option. This is due to the possibility that an order maybe saved "partially", without the completion of Order Validation safeguards. So again, this option is designed as a temporary measure, until your computer operations get back to normal.



## Adding Pictures (image files)

One of the important features of the Visual Ticket System is the ability to select Pictures (Image files) for a given item (customer, employee, or a picture on an enclosure card), from a variety of graphic Sources available.

However, the original Pictures that are shipped on the CD are there as examples, only. These Pictures are scanned using only 100 DPI (Dots per inch) scan mode, which are generally considered as "low quality" bitmaps. This is solely due to the CD and disk space limitations, when shipping the entire product line on a single CD. The Pictures shipped on the CD are most probably irrelevant to the work you do at your shop.

When designing your products, or setting up your inventory, you may want to consider adding your own Pictures to Inventory, Customer (or Employee) database, Event Worksheet items, etc. etc.

As far as supported images, please note that the Visual Ticket uses GDI+ Graphics subsystem which can handle variety of Image formats. The GDI+ subsystem is part of Windows XP Operating System, and is updated as Windows XP is upgraded. We provide special GDI+ Run-Time module for Operating System prior to Windows XP (such as Win9x).

These image files may include any of the following Graphic format File extensions:

| *Graphics File* | *Extension* | *Graphics File* | *Extension* |
|---|---|---|---|
| Bitmap | **.bmp** | Cursor | **.cur** |
| Animated Cursor | **.ani** | Icon | **.ico** |
| Device Independent Bitmap | **.dib** | Tag Image File Format | **.tif, .tiff** |
| Exchangeable Image File | **.exif** | Windows Enhanced Metafile | **.emf** |
| Graphics Interchange Format | **.gif, .gfa** | Animated GIF | **.gif** |
| Joint Photographic Electronic Group<br>JPEG File Interchange Format | **.jpg, .jpeg, .jpe, .jfif** | | |
| Portable Networks Graphics | **.png** | | |

You can either use a Scanner to scan pictures already available on your own Catalogs, or you can use a Digital Camera to take snap shots of the arrangements (or products) that are made (or used) at your shop, for various events. Please note that when using commercial catalogs, you should seriously consider obtaining the necessary permissions from the publisher, since these catalogs are usually Copyright material.

This means you can use images as they are from various sources such as your Digital Camera, or various catalogs such as FTD, or Teleflora, CDs (without having to convert them to bitmap first). You don't even have to copy the images to a hard disk. You can just select the files from a centrally located (mapped) CD Drive.

If you have multiple stations, in order for the images to be viewable on all stations, the Image files must be located on a central disk (either hard disk, memory stick, or CD Drive) that is mapped (with the same Drive designator) on all stations. For example, if you are using a catalog of Arrangement Pictures on a CD, the CD Drive containing the CD Catalog must be mapped as say Y: (or whatever) Drive on all stations.

Please note that "Animated GIF" is a "Movie" of multiple GIF pictures, such as the "Burning Candle" image that is visible on the Tulip (Startup) screen. You can make your own fun Animated GIFs using applications such as Adobe PhotoShop. You can also download some interesting ones. The Burning Candle image used on the Tulip screen, is used as a Bench Mark for determining the Graphics Capabilities of the hardware.

As an additional enhancement for using Graphic and Image files in Visual Ticket, the LAST folder used for image files is always (saved and) "remembered" the next time you select an image. This holds true, even after you quit and restart Visual Ticket.

The Picture Directory on each station is:

X:\sms\vft\bitmaps\products

(where X: is the Disk ID where the CD was installed).

Please note that the system also provides "sub-directories" below the "Product" folder, allowing you to separate the picture, based on the type of product or the type of application.

## Enlarging and Printing

When accessing one of the following forms with PICTURE(s) on them;

- Inventory Profile.
- Customer Profile.
- Employee Login / Employee Setup.
- The Prep form (Production Tracking).
- The Card form.
- Event Worksheet.

### Enlarging Pictures

Right-Click on any picture, to see the ENLARGE version (by opening the Enlarge form).

### Printing Pictures

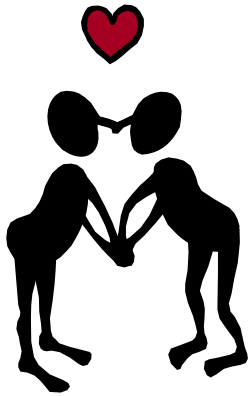
On the above "Enlarge" form, there is "Print" button located on the lower left corner allowing you to Print the enlarged picture.

**A Sample Application:**

During a Wedding Consultation, you and the customer have agreed on a certain Bridal Head piece. To insure that the event documentation contains a copy of the item, you can

- Right click on the Picture,
- Click on the Print button to Print Preview the picture.

You may then print the Picture and attach it to the Event Worksheet template, or you can use the Save/Send Toolbar to SAVE the picture as a PDF file and attach it to an email.



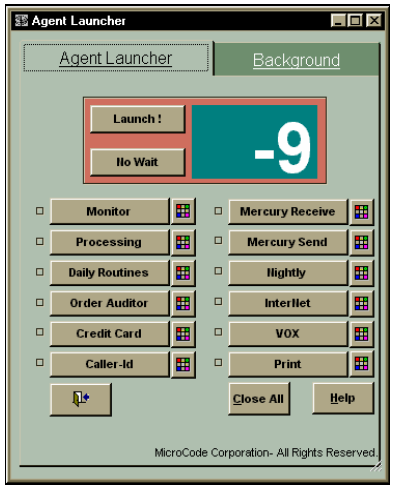
# Appendix -4

**Recommended read for:**

1) System Manager

## Agents Setup

### Overview




The ability to run Visual Ticket Agents in the background is a luxury made available only because of the faster and more efficient hardware that has become common place in the recent years.

The point of this argument is that Agents do not have to necessarily be run in the background. As a matter of fact, you can run any agent directly from the Agents menu, in foreground without tying up any System Resources in background processes.

For example, if you have a single VT system, fully configured to have all the Agents available, but the hardware is a slow Pentium system with minimum amount of memory, it may not be feasible to launch all the Agents on a single machine.

In this case, you would enter a few orders, run the Print Agent, then run the Mercury Agents, in foreground directly from the Agents menu. In other words, you would run a particular Agent, when it is needed, and once the agent is done, it automatically goes away, allowing you to maintain optimum System Response time (on slower machines).

Now, faster systems you can run the Paint Agent, and the Credit Card Agent in the background, and still find the system response time adequate. Then the only Agent you need to run manually, would probably be the Mercury or the Dove agent (every half hour or so).

The conclusion is that based on the hardware capabilities, number of stations, and which agents are available, you need to distribute the "Agent" load, so that system response time remains optimal.

As hardware becomes faster and faster, and memory becomes cheaper, this argument will become more of a moot point. Today's servers (at time of this writing) are more than adequate to run all the Agents on a single server. As a matter of fact with faster ZION processors now-a-days, running Terminal Services configurations, not only all the agents run on the server, but up to 10 Visual Ticket sessions also run simultaneously. It is all matter of how much memory is installed on these super fast servers.

We will now discuss individual Agents, and what is the recommended setup for each one: To setup agents, please use the Agents menu, and activate the Agent Launcher. Please note that the "Agent Setup" for each Agent is accessed by clicking on the little "Setup" button located next to the "Launcher" button for each agent on this form.

## Running Agents

There are certain Agents that operate on Orders. These Agents include the Process Agent, the Daily Routines Agent, the Print Agent, etc. Other Agent provide a specific service such as the Caller-Id Manager, or the Monitor Agent.

### Menu vs. Background

Agents that operate on orders, maybe run either in the background, or directly from the menu. When an Agent is run from the Agent Menu, it runs once and then it disappears. So, in this mode, the Agent does the Job, and goes away, without tying up any resources.

On the other hand, when an Agent is launched from the Agent Launcher (or as a part of the Startup Action), it will stick around in the background, and will run periodically every so many seconds, minutes, or hours. In this mode, the Agent will do it's thing, in the background, without having to remember to run it every so often.

When an Agent is setup for a specific Station Number (in the Agent Setup form), it will only be available from that station's Agent Menu (it will be grayed out on all other station's Agent menu). In order to make a specific Agent available on all stations, you must select "No" for the "station number" on the Agent's Setup form.

### Session Specific Access

Only applies to Print, Process, Credit Card, Daily Routines, and Mercury (Send) agents. In the setup form for these agents you will notice a checkbox labeled "Session Specific Access".

This will limit the scope of orders accessed, to orders generated by the current session. Only check this box, if you want to have each station Print, or Process it's own orders. In other words, this option will provide "Local Control" of processing and printing of orders.

This mode only applies to running the specific Agent from the Menu. When the Agent is launched to run in the background, it will access all orders (will not be session specific).

The application is for when the person taking the order is also responsible for gathering the paperwork and sorting the tickets for his/her own orders.

In order to run session specific Agents, select "No" for station number (which will disable the launching of the Agent for background operations). Check the "Session Specific Access" checkbox. Now, the Agent will become available on all stations "Agent Menu". Each station will then run the Agent from it's own menu, whenever s/he wants to process or print his/her own orders.

## Prevent the Automatic Closing of Agents

You can now STOP the "Automatic Closing of Agents" (this is mainly for trouble-shooting purposes) when the "Close Agents" command is issued (due to running File Maintenances or installing a new software update, etc.).

To do so, from **Setup Manager**, go to "**Environment Setup**", go to "**Page2**" and check the box: "**Stop Auto-Closing of Agents**".

# The Monitor Agent

The purpose of this Agent is to coordinate File Access among different stations, monitor station logins and logouts, authorize usage, and control sessions.

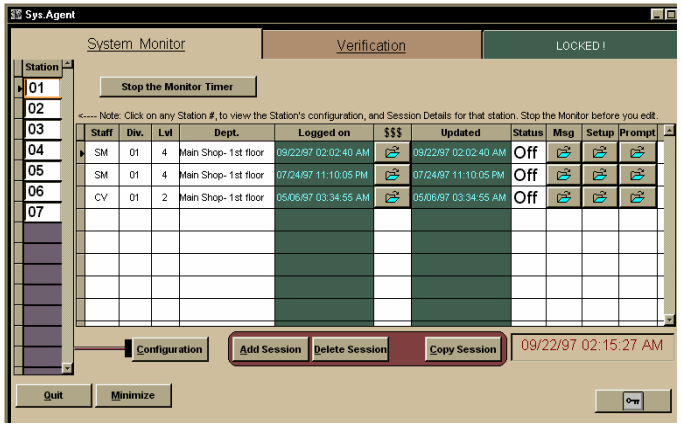
The Monitor Agent has the following three tabs; the **System Monitor**, **Verification**, and **Locked**. The System Monitor tab has the following two grids; a) the Station gird, and b) the Sessions grid. The Station grid has the number of stations setup for your shop by Visual Ticket based on your most recent Purchase Order/Invoice. You can click on any one of the station numbers on the Station grid to show the session's setup for that station. Once a station number is selected on the Station grid, you can click on the "**Configuration**" button, to see the available features setup for that station number.

### Monitor Agent Timer

The System Monitor has a "Timer" that runs every 30 seconds and each time, it monitors the access and the status of different stations running on the Network.

The Monitor Agent must always run in the background, otherwise after 15 minutes or so, the menu on each Visual Ticket station becomes disabled.

When accessing the Sessions grid, it is required that the timer be stopped. This is true when you are adding new sessions, or changing the Staff, Division, Access Level, and Department fields on the grid. However, when accessing the buttons on the Sessions grid (Session Defaults, Balance Utility, etc.), the timer does not have to be stopped.




The stopping and starting of the Timer is performed automatically. You need to let the timer run at least once every 15 minutes in order not to disrupt the station operations.

### Add/Modify Sessions

We recommend that you use only one session per station, until you have been online for at least a week or two. This way, you can better fine tune Session Defaults, once you are ready to add the additional sessions. Initially make changes (with respect to Session Defaults, and the Prompter setup) to Session 01SM of Station #1, and then once you have firmed up your Session Defaults, use the "**Copy**" button to apply the change to all other sessions.

### Access Levels

If you need to limit employee access to the system, and require additional Security with respect to access levels (i.e.; do not want your employees to access the sensitive areas of the system), then setup two sessions per station. The second

session for each station should be setup with Access Level 1 or 2. The second session on each station with lower access level should dedicated for your employees to logon to the system.

### Central Control

One of the main features of the Monitor Agent is to provide the System Manager Central Control when accessing individual sessions from the VT Server (which is usually located at the office).

- For the operation of the Balance button, please see "Balance Utility" discussed in the "Balancing & Reports" chapter of this book.
- For specifics on the "Setup" button, see "Session Defaults" earlier in this chapter.
- For the operation of the "Msg" and "Prompter" buttons, please see the "Mail/Message" and "Prompter" in Employees Chapter.

## Verification Tab

The Verification Tab on the Monitor Agent provides the interface to the Hardlock key. Once the key is operational, you no longer need to be concerned with this page (unless of course the key is missing or is damaged).

## Locking the Monitor Agent

The "Locked" tab is displayed when you lock up the Monitor Agent to prevent unauthorized access. You can "Lock" the Monitor Agent by clicking on the "Key" button. In order to "Unlock" the Monitor Agent, click on the "Key" button again, and enter the Master Password (setup in Environment Setup section of the System Manager).

Since the Monitor Agent controls System Access Levels, and provides access to the "Balance Utility", and Session Defaults, you can setup it up so that it wakes up in the "Locked" mode. See "Environment Setup" form in the Setup Manager.

The System Monitor Agent must always be run in a background window. Here are the recommended setup parameters. Click on the Setup button for Monitor Agent on the Agent Launcher and verify that:

- Station Number Assigned: Station #1 (Server)
- Include in Auto-Launch: must be checked.

Agents

## The Process Agent

The purpose of this Agent is to extract submitted orders that are due, and post those into the long term Posted Database (Micro Florist's permanent records). During processing, customer balances are updated, inventory is reduced, wire service accounts are updated, and sales records are generated.

The decision on how the Process Agent runs, affects order status on the Order Pad, and should be considered carefully. Here are the available options:

- Process Agent is run from the menu in foreground.
- Process Agent is launched and then it is run every 10 to 20 minutes.
- Process Agent is run by the Nightly Agent (Server Shutdown) before closing.

Running the Process Agent from the menu, is obviously under Operator control, and s/he may run it when s/he believes it is needed to be run.

The main argument is whether it should be run periodically, or only one before closing. Here are the Pros and Cons on running it periodically:

***Pros:***

Orders are posted into Posted Database as they are submitted. This will keep the Posted Database up-to-the-minute with respect to customer balances, and the available inventory.

Another advantage is that "Shop Loading" information is captured in the Posted Database, allowing you to see charts or generate Excel spreadsheets with respect to "order activity" in each hours of each day of the week (used for planning and staffing purposes).

***Cons:***

When the Process Agent runs, submitted orders become "Posted". This means you can no longer simply "un-submit" the order, to make modification. As mentioned above, the only way a "Posted" (or Processed) order can be changed, is to either "Reverse" it or Void the Posted record first (by clicking on the Reverse button). On the other hand, if the Process Agent is run at the end of the day, you can change any order during the day, by simply "un-submitting" it. Here is our recommendation:

While the system is being implemented, and your staff are being trained, you should schedule the Process Agent to be run only at the end of day. This will allow your employees to make changes to orders, entered each day, without having to worry about reversing the order. Once everybody is trained and has become comfortable with the system, you can then start launching the Process Agent and run it periodically through out the day.

So, initially at least, you should use the following setup parameters for the process Agent:

- Station Number Assigned: Station #1 (Server)
- Include in Auto-Launch: Not Checked.
- Close after the first run: Checked.
- In this case the Startup Delay, and Repeating period no longer apply.

To schedule the Process Agent to run from the Nightly Agent, see the Nightly Agent setup below.

## The Daily Agent

The Purpose of this agent is to review all Standby orders and extract orders that have become due, Archive Processed orders based on the Archive parameter, purge Archived orders based on the Purge parameter, and also generate all Standing orders that have been schedule for that day, plus other system Maintenance tasks. The Daily Agent needs to be run only once a day. It also needs to be run, when you tell the system to process tomorrow's orders (see Order Pad Status Review in Order Management Chapter.

Here are the recommended setup parameters for this agent:

- Station Number Assigned: Station #1 (Server)
- Include in Auto-Launch: Checked.
- Close after the first run: Checked.
- Startup Delay: 60 seconds
- Repeating period: Not Applicable.

## Chart Agent

The Chart Agent function is discussed in the Planning Chapter. The default settings for this Agent is

- Station Number Assigned: Station #1 (Server)
- Include in Auto-Launch: Checked.
- Close after the first run: Not Checked.
- Startup Delay: 1 Hour (to the draw the first Chart, after sales have come in).
- Period: automatically recalculates the Revenue figures and updates the chart every 15 minutes.
- Window State: "Normal" at startup (instead of Minimized, so that it maybe visible).

## The Credit Card Agent

The Purpose of this agent is to hunt down orders that have been "Queued up" for credit card authorizations (from the Payment form), that have not yet been sent to the bank. Once the orders are identified, this Agent obtains authorizations from the Credit Card Server, and stamp the orders "Paid". The order is also submitted automatically, if the credit card authorization has been the last thing holding up the order from becoming "Ready", given that you have enable the "Auto Submit" parameter in the Setup Manager.

Here are the recommended setup parameters for this agent:

- Station Number Assigned: Station # ? (assign as you see fit)
- Include in Auto-Launch: Checked.
- Close after the first run: Not Checked.
- Startup Delay: 5 minutes (so that it is spaced out from the running of the Daily Agent on the Server).
- Repeating period: 17 Minutes (Please note that there are no customers waiting for these authorizations, since POS stations can submit their urgent authorization requests, directly to the Credit Card Server, and those transactions will not be going through the Credit Card Agent).

## The Caller-Id Agent

This Agent (Caller-Id Manager), maintains the hardware interface to the MLA, and provides Caller-Id Server services for the LAN.

As it was discussed in "Accessories Setup" of this handbook above, the Caller-Id Manager (Agent) can be launched directly by clicking on it's shortcut on the Windows Desktop. The Agent Launcher can also launch this Agent on the station that is connected to the MLA (multi-Line Adapter).

Here are the recommended setup parameters for this agent:

- Station Number Assigned: Station # ? (Station connected to MLA)
- Startup Delay: 60 Seconds
- COMM Port (the serial port that the Null Modem Cable to MLA is connected to).

## The Mercury Agent

The Purpose of this agent is to maintain the communication bridge with the Mercury Direct Host (located at FTD), and download all incoming orders and verifications. Incoming orders include wire-in orders from different wire services, Flowers After Hours orders, and verifications on Wireout orders. The Mercury Agent uses very sophisticated software algorithms to translate a set of mixed up characters on a flat file order, into an organized set of records in a relational table.

The Mercury agent also performs out-going message transmissions by uploading all outgoing orders and REC messages. The Mercury agent translates Visual Ticket orders, into Mercury order format.

### Running it overnight

In order to receive orders through out the night, especially during busy holidays, you may want to leave the Mercury Direct Agent running at night.

To do that, after you have finished for the night and ran Server Shutdown, restart only the Monitor Agent and the Mercury Agent, and quit everything else.

Here are the recommended setup parameters for this agent:

- Station Number Assigned: Station # 1 (must be connected to Internet).
- Include in Auto-Launch: Checked.
- Close after the first run: Not Checked.
- Startup Delay: 10 Minutes
- Repeating period: 15 Minutes.

## The Dove Agent

The Purpose of this agent is to maintain the communication bridge with the Teleflora's Dove system, and download all incoming orders and verifications. Incoming orders include wire-in orders from different wire services, and verifications on Wireout orders.

Since all incoming orders that have arrived through out the night, are waiting to be imported into the Order Pad by the Dove Agent on it's very first run, it is a good idea to make sure the Dove Agent start time, is well spaced out from running into other Agents.

The Dove agent also performs out-going message transmissions by uploading all outgoing orders and COM messages. The Dove Agent translates Visual Ticket orders, into Dove order format.

Here are the recommended setup parameters for this agent:

- Station Number Assigned: Station # ? (Station connected to Dove).
- Include in Auto-Launch: Checked.
- Close after the first run: Not Checked.
- Startup Delay: 12 Minutes
- Repeating period: 15 Minutes.

## The Bloomlink Agent

The Purpose of this agent is to maintain the communication bridge with 1-800Flowers Bloomlink system, and download all incoming orders. Currently, outgoing orders are not supported by the Bloomlink System. Incoming orders include wire-in orders from different wire services (FTD, 1800 Flowers, and Teleflora), as well as "Direct Pay" orders.

Since all incoming orders that have arrived through out the night, are waiting to be imported into the Order Pad by the Bloomlink Agent on it's very first run, it is a good idea to make sure the Bloomlink Agent start time, is well spaced out from running into other Agents.

Here are the recommended setup parameters for this agent:

- Station Number Assigned: Station # ? (Station connected to Bloomlink).
- Include in Auto-Launch: Checked.
- Close after the first run: Not Checked.
- Startup Delay: 18 Minutes
- Repeating period: 15 Minutes.

## The Nightly Agent

The Purpose of this agent is to automate most of the "Closing Up" chores, that otherwise would need to be performed manually. These chores include;

- Running the Process Agent (see Process Agent).
- Running Accounting Interface Module build.
- Running eManager Build and Transmit.
- Running Visual Ticket File Maintenance.
- Running Visual Ticket backup.
- Running Micro Florist File Maintenance.
- Running Micro Florist backup.
- Display "Important Announcements" posted by Visual Ticket Support.

Running the Visual Ticket File Maintenance every night insures that all Deleted Records are packed, all index files are refreshed, and all table relations are updated. This improves the overall system performance.

Running a daily backup of the Order pad data, will protect your system from File Corruption, and fatal Operator mistakes. System copies the data into 3 alternating (rotating) backup directories, allowing you recover data from up to 3 sessions before the current session.

Running the Micro Florist System (MFS) backup is run as an extra precautionary measure, since Micro Florist system has it own Automatic backup routines, but the MFS backup routines will not be performed, unless the Micro Florist System is accessed and then closed every night. However, since Visual Ticket system updates the Customer, Inventory, and transaction records of the Micro Florist System, in order to do a successful recovery of Visual Ticket's Order Pad data, the Micro Florist files need to be also recovered, such that the VT and MFS data are in full synchronization with each other.

The Nightly Agent is hardly ever launched from the Agent Launcher. Once it is enabled in this setup form, you will notice that "Server Shutdown" selection on the File menu, becomes available. It is important to note that the Server Shutdown will only be available on the VT Server station (Station #1). To close VT at the end of the day, and activate the Nightly Agent, you would use :the "Server Shutdown" selection, instead of normal Exit (on the File menu).

Once the Server Shutdown is executed, the following takes place.

- The Nightly Agent is launched, and the timer starts counting down. The count down should be around 5 minutes .(or 300 seconds) to provide you with ample time, to close all Visual Ticket and Micro Florist applications. This is due to the fact that the Nightly Agent must have "exclusive" access to all the data files (meaning no other system should be using MFS or VT data). If after the 5 minutes, an application is still running, and accessing MFS or VT data, the Nightly Agent will issue an Error Report.
- The Visual Ticket system terminates.
- The Nightly Agent sends a "Close" message to all Agents currently running. Since Agents read their messages once every 20 seconds, it will take about 20 seconds until all agents are closed up.
- Once the 5 minutes is up, the Nightly Agent will start it's work. Please note that if you are in a hurry, and have already close all the applications, you can shortcut the counter, and click on the "No Wait" button.
- Now the system launched the Process Agent and posts all Visual Ticket orders (that are due, paid, ready, and submitted) into Micro Florist permanent files.
- The Nightly Agent will then run the File Maintenance, followed by the scheduled Backup Routines.
- Right before the Nightly Agent shuts down for the night it may display an "Important Bulletin / Announcements" (posted by Visual Ticket Support), in case there needs to be one..

### Nightly Backups

An important discussion with respect to the selection of the Backup disk drive:

You may either select the Local (ie; the C: drive) or a Network disk (another station's disk drive) for the automatic backup directories. Choosing the Local drive has the following Pros and Cons:

***Pros:***

To compete the backup process on the Local Drive, you would not need to have the other station powered up, and the availability of Network connection would not be an issue. It may also be 2-3 times faster writing to a Local drive than it would be for a Network drive.

***Cons:***

If the Local Disk Drive fails, and you have not had a chance to obtain a tape backup that day, the Order Pad data, as well as the backup data, will all be gone at

the same time. However, hard disk failure is quite rare, and usually backup is performed to protect the system against file corruption and Operator error.

### Support Bulletin / Announcement

The "Support Bulletin / Announcement" appears as a website. The Nightly Agent will display the Announcement for as many nights as the Announcement is still active. If you find the information useful, you may print it, otherwise, you can just ignore and close it. The Bulletin may also provide links to other websites, if need be.

To access the Support Bulletin, the Nightly Agent may need to establish Internet Connection (in case there is no permanent connection, such as Dialup connection). At that point, you mat allow it to connect, or cancel.

If you are not interested in (or are not able to) receive these important "Support Bulletins", you may decide to deactivate it. To deactivate, simply uncheck the corresponding checkbox in the Nightly Agent Setup form.

The special Bulletins / Announcements, may inform you of a certain Tech Support Bulletin on issues that may affect your system, or state a special offer that can save you money, or provide you with important Contact Information to take advantage of certain Technology Partnership Announcement, and so on.

### Saving Archive Copies of Aged Balances

The Nightly Agent allows you to save an Archived copy of Customer Aged Balances on a Nightly basis during Server Shutdown (in addition to the Monthly basis automatically performed during New Month Routines).

Please see "Customer Aged Balances" section in Chapter 8 for more details.

### The Cleanup Utility

The new checkbox: "**Run the Cleanup Utility afterwards**" on the Nightly Agent (during Server Shutdown) allows you to run the Cleanup Utility. The Cleanup Utility cleans up Temporary Files and resets the Posted Index files.

## The Internet Agent

The Internet Agent is run under Program control, and it is never launched on it's own.

Certain Viruses or Firewalls block the ports that are used by the Internet Agent, even after the virus has been eliminated, or the Firewall deactivated (or even un-installed).

To remedy this situation, Visual Ticket offers the option of using the "Alternate Internet Agent" which uses an entirely different FTP Transport Engine, and FTP ports.

You can select to run the "Alternate Internet Agent" by going to Local Connections, click on the "**System**" tab, and check "**Use the Alternate Internet Agent**" checkbox. The Alternate Internet Agent has a "Progress Bar" showing "Bytes transferred" vs. "Bytes remaining".

## The VOX Agent

The Purpose of this agent is to perform Virtual Order Transfer (VOX) operations among:

- Branch shops and the Main Shop.
- Download and import orders from your Website.
- Sales Centers and a Central Design location.
- Transmission of eManager emails through-out the day..

The details of VOX operations, and it's many different modes, are discussed separately in the VOX Chapter. For the time being, we should look at it as the Agent that will be exporting orders that need exporting, or importing orders that need importing. As such, it should probably be scheduled entirely according to the level of activity that the VOX Agent need to handle.

## The Print Agent

The purpose of this agent is to locate any order that has a "Pending" Print Request, find out which program, or template applies, then generate the Production Ticket, and then send them to the printers that they have been assigned to for that Print Job.

Here are the recommended setup parameters for this agent:

- Station Number Assigned: Station # ? (based on loading, and printer connections).
- Include in Auto-Launch: Checked.
- Close after the first run: Not Checked.
- Startup Delay: 12 Minutes.
- Repeating period: 3 Minutes.

## Printer Errors

### The Timer Delay option

You have the option to have all Printer related errors to be on a 15 seconds Timer delay, after which time, the Printing by the Print Agent will resume. Of course, you may choose a different Timer Delay value, as needed.

This feature is especially important in Multi-Shop environments where a certain Printer may go off-line (runs out of Toner or something), it will no longer stop the Print Agent from printing to all the other printers (while the problem is being looked after).

If you are running a Multi-Shop operations, or want your printer errors not to hang-up the Print Agent from printing other Print Jobs, here is how you can add the Timer Delay:.

- From the **Setup** menu, go to **Setup Manager**, go to **Environment Setup**, go to **Page2** and enter 15 seconds for the "Print Error Timer Delay" value.

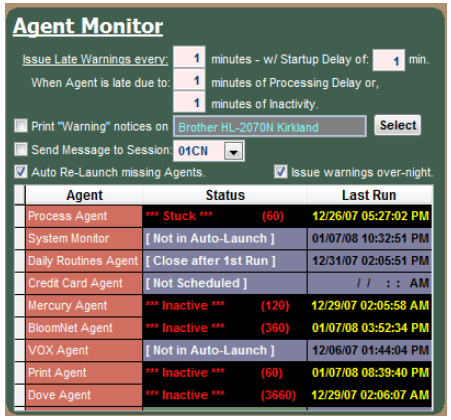
The down side of having the Print Errors be on a Timer could be that a problem with Printer settings of a certain Print Job go unnoticed for a while (since the Print Agent continues to print w/ the error message, but no one may be watching...).

To disable the above Timer Delay, use the Default value of ZERO seconds, which means the Printer Error Prompt stays on the screen (pausing the Print Agent) until somebody confirms it by clicking it.

## The Agent Monitor

Is not very often that either an Agent is exited (closed) unintentionally or for some external factor it gets stuck in the middle of processing. But if and when something like that happens, the Agent Monitor is there watching closely and taking appropriate action to notify and if possible automatically remedy the situation.

The Agent Monitor runs from the **Verification** tab of the System Monitor Agent and performs the following important functions;




- It continuously monitors the Heartbeat of (Mission Critical) Agents (not all Agents are critical, such as the Chart Agent).
- It updates each Agent's "Status" on the **Agent Monitor Grid** (you can check it out by clicking the **Verification** tab of the System Monitor Agent.).
- The Agent Monitor considers the following two status conditions actionable.
  - Inactive: The Agent has not run for the time period consisting of
    - [ Inactivity Time + Agent's Cycle Time ]
  - Stuck: The Agent has become Stuck while processing, for a time period consisting of
    - [ Delay Time + Agent's Cycle Time ]
- The Action Cycle determines how often you the Warning message is issued, once an Agent is determined to be Inactive or Stuck.
- The values for the Action Cycle, the Inactivity Time and the Delay Time are 15, 20 and 10 minutes respectively, but you can increase these numbers to loosen up the criteria for taking corrective action, or decrease them to tighten it up. For example, if you are getting Warning Notices too often, increase the numbers to compensate. You can set these numbers on the **Verification** tab of the System Monitor Agent.
- Once an Agent becomes either Inactive or Stuck (according to above definitions) then the Agent Monitor will take the following corrective actions;
  - Sends a Warning Ticket to a Printer (you can select the most visited Printer at the shop, for this purpose).
  - Sends a Warning Mail (via Visual Ticket's Inter-Station Messaging system) to a Session (Station Id + Staff Id) for your choice (you should select a Station # that is used the most often).
  - Automatically Re-Launches the missing Agent.

These actions are taken with a 15 minute Action Cycle from when the System Monitor Agent launches and then every 15 minutes after that. So, if you don't respond to the first Warning Ticket (or Mail Message), then another one is printed (sent) 15 minutes later.

### Issue warnings over-night

When this checkbox is NOT checked (the default value), the Agent Monitor will no longer Print (or send) any Warning Tickets / Messages from 9 PM to 7 AM. The "Auto Re-launch of missing Agents" feature however, will still be active during those hours.

If you like the Warning Tickets / Messages to still print (or be sent) over-night, then make sure you check the above checkbox.

### Reporting status of the System Monitor Agent

The above actions can only be taken, given the System Monitor Agent, and by extension the Agent Monitor itself, are running. However, if the System Monitor Agent is shutdown then the local instance of Agent Monitor (running from the Order Pad Timer) checks the status of the System Monitor Agent and prints the Warning Ticket and / or sends the Mail Message.

In this mode, only the status of the System Monitor Agent is reported and the Automatic Re-launch is not active (only the Monitor Agent can Re-launch other Agents). In this case, the Order Pad needs to be open, which runs the Local Agent Monitor, once every 5 minutes.

### Reporting status of Agent running on Stations

If you have an Agent that runs on a Station (rather than on the VT Server), and it is either missing or stuck, then the Agent Monitor will issue and print the Warning message, but it will not able to Re-Launch the missing Agent (since the System Monitor Agent only runs on the VT Server).

### Verifying Agent Monitor Operations

- To verify the proper operation of the Agent Monitor and make sure the Mail Message is going to the right Station, and the Warning Ticket is printing on the right Printer, bring up one of the Agent and click the Pause button.

Then wait for the duration of the "Action Cycle" the "Inactivity Time" plus the "Agent's Cycle Period" to verify the printing of the Warning Ticket. It will take up to 5 minutes for the Mail Message to popup on the target station (given the Order Pad is open).

- To test the "Re-Launching" of a missing Agent, bring up an Agent and Exit it. Then wait the same amount of time as above to verify the Agent is Re-Launched.

To reduce the wait times for testing, you may want reduce the Action Cycle, the Processing and the Inactivity Delays to say 1 minute each and then use an Agent with shorter "Startup" and "Cycling Period", such as the Print Agent (don't forget to change them back, when you are finished).

# NOTES

# Appendix -5

**Recommended read for:**

1) System Manager

## Micro Florist

### Overview

As mentioned in chapter-1, the Micro Florist is the "Posted Database" Container. It is the "Keeper of Data" so-to-speak. It monitors, repairs and refreshes Posted Database files and indexes. As far as the actual application, it is mainly used for printing additional reports, and certain perform certain Transaction Modification or Reconciliation. All information in Micro Florist is considered to be "Proprietary" (or "Privileged"), and as such it can be Password Protected.

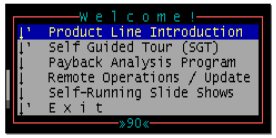
Micro Florist is licensed to operator only on the VT Server (station #1). This is why you can start the Micro Florist directly from the shortcut located on Windows Desktop on this station. However, access to Micro Florist is also provided from ANY station's Setup menu, but the access requires the Master Password. Please see System Manager Chapter for details.

If you wish to go beyond the features discussed in this manual, and utilize the Micro Florist to it's full potential, you may want to take a look Micro Florist's Self Guided Tour.

In this User's Guide however, we only touch upon some of the features that most Florist find useful, and leave out most of the other "older" features of Micro Florist for those who want to seek them out by either exploring them from menus, or becoming familiar with them by going through the Self Guided Tour utility.

We have covered the Micro Florist's contribution to each topic in this User's Guide in its own respective Chapter. Here in this Appendix, we cover the "General Setup" of Micro Florist, plus those features that have not been covered in the various chapters.

### Self Guided Tour (SGT)




In order to become familiar with the Micro Florist System, and utilize it to it's full potential, we strongly recommend that you go take a closer look at the SGT. In order to get to the areas that you need to visit, without wasting any time, please follow these instructions:

- From the Visual Ticket Shortcuts, click on Self Guided Tour (SGT) shortcut.
- Once the SGT is started, From the Main menu of SGT, select the second selection that is labeled "Self Guided Tour (SGT). You may ignore everything else on this menu. They have all been obsolete by Visual Ticket's introduction since 1996.
- This will open the 3 level Menu Interface, allowing you to view slide Shows, and read the corresponding topics.
- Since you are using Visual Ticket, ignore everything bout the "Flora-Ticket" selection. Specifically focus on the Customer, Inventory, Transactions and Wire Services topics. There are still wealth of features that can come handy for one requirement or another.
- In case you want to search for a specific subject, use the SGT Search Utility. Always press Spacebar for Help.

### The Most Important Tip!

When in Micro Florist, the best User Interface experience is to:

- NOT use the Mouse.
- Use the Up, Down, Left and Right Arrow Keys (to move around in menus and databases).
- Use the Enter key to make your selection.

So, as soon as you get into Micro Florist, put your Mouse away and put your fingers on the Arrow and Enter keys.

# Micro Florist Setup

Since you maybe using the Micro Florist, at least for printing some of the additional reports, and topic discussed under different topics of this book, we need to at least setup the Printers and enter your Company Name, Wire Services Codes, and so forth.

## Printer Setup

Since Printing Reports is one of the primary functions of the Micro Florist, we need to make sure the Printer Setup works.

### PCL5 Compliant Printer

As mentioned in Hardware Requirements (Chapter -1), the Micro Florist Print Jobs and Visual Ticket's Basic Format Templates all require PCL5 (or higher) compliance. So, when buying those very cheap printers make sure you check Printers Specification to insure it clearly states that the printer is PCL5 compliant (or supports PCL5 Emulation).

### Local vs. Network Printing

The simplest way to handle the LPT Port requirements of the Micro Florist is to have a Local Printer directly connected to the Printer Port of the VT Server. This port assignment is usually LPT1 which is also the Default port Micro Florist uses to send print jobs to.

So, if this is the case, let's try a Print Job and verify that it works, so that we don't have to worry about it. From the Main Menu of Micro Florist, go to Financials menu, select Balance Sheet, select Yes for Printing, and then hit Enter a few times to get back to the Main menu. Check the local printer to see whether the Balance Sheet is printed. Make sure there are no strange letters or codes on the page.

If the test worked, you may jump to the next section. If it didn't, then you can either use another station with Local Printer to run Micro Florist for printing purposes, or you can follow the instructions below to setup the Network Printer and "Capture" the Printer Port.

This stuff is what Network Technicians eat for breakfast, but if you are trying to do this yourself, just be patient and follow the instructions carefully.

## Capturing LPT port

If the above Printer Test did not produce the Balance Sheet Report, and have no other station to run the Micro Florist for printing purposes, then you should follow this procedure. This particular procedure however, applies to Windows XP. For other versions of Windows the procedure should be close, if not exactly the same.

Start "Command Prompt" (from the Start menu go to Programs then to Accessories menu). To start Command Prompt, you may also go to Run from the Start menu and type cmd in the Open field. When in the (black) Command window, type cd\ (C D backslash) and hit Enter.

To see the list of all the computer names on the network, type net view and hit Enter. This will list all the computers on the network. Once you find the specific \\computer_name (or the print server) that is sharing the specific printer you have in mind, type:

net view \\computer_name (insert the actual computer name from the above list)

This will list the resources on that computer, including the share name of the specific printer on that computer. Now that we have both the computer name (or the print server) and the printer's share name, type.

```
net use LPT1 \\computer_name\share_name /persistent:yes
```

Instead of LPT1, you may use LPT2, LPT3, …LPT9, computer_name is the computer (on the network that the printer is physically connected to) sharing the printer, and the share_name is the shared name of the printer on that computer.

This will establish a persistent connection to a specific Printer Port (ie; capturing the LPT1 thru LPT9 port), in Windows XP. To verify the connection has been established properly, type net use command by itself and hit Enter. To disconnect the above lpt1 port, you may type

```
net use LPT1 /delete
```

For example, to map LPT3 to a printer shared as Laser1 on a print server (or a network computer) named vt_server, we type:

```
net use LPT3 \\vt_server\laser1 /persistent:yes
```

To delete it, we type

```
net use LPT3 /delete
```

Note that in Windows XP, non-administrative users cannot map an LPT port to a network printer path, when the LPT port exists on the computer as a physical parallel port.

### With a little help from your Friend

If you are still not comfortable doing this stuff yourself, you may get the Visual Ticket to help you out. From Local Connections, go to Print tab, and click on the little button labeled LPT. The system will then guide you thru the above steps and execute the command for you.

### Printer Auto-Switching

This section applies only if for whatever reason, you can't use LPT1 as the captured port, and must use LPT2, LPT3, ..or LPT9.

From Micro Florist's Main menu, go to the Setup menu, select Division, and select Setup Division Environment. From the next menu, select "Printer Auto-Switching". The system will then list different print jobs on the left, and will allow you to enter the LPT assignment in the field next top the Print Job name.

Blank fields mean the default LPT1: port. Now enter LPT2: LPT3: and so on. Make sure you enter the : (which is a colon, and not a semi colon). Leaving a field blank, would use the default LPT1: for that print job.

### Printer Brand Selections

If you are using an HP Laser Jet compatible printer, you may move on to the next section. If for what-ever reason you are using Dot Matrix printer, read on.

From the Main menu, select the Setup Menu. Select Division and press the Enter key. From the next menu, select "Setup Division Environment".

From the next menu, select "Printer Configuration". Enter "Y" to enable Printers. Enter "Y" to change the Printer Configuration.

The cursor will move to the Printer name and model. Enter a "?" (question mark), and hit the Enter key. From the list, select either Epson Fx/Mx if you are using a Dot Matrix printer, otherwise select the "HP LaserJet", if you are using either a LaserJet or an Inkjet printer. Once you have selected the correct printer, press Escape to exit the selection window. Enter "N" for "Change Esc. Sequences". Repeat the above procedure for the "Receipt Printer", and "Card Printer".

In order to test the printers, return back to the Main menu, go to the Financial menu, select "Balance Sheet", and enter "Yes" for printing the report. After the printer has finished printing the report, please inspect it and make sure that the report looks OK.

### Adjusting the Font Size

If you are using a LaserJet, and you notice that the "Condensed Font" on Micro Florist Reports looks too small), please follow the following procedure:

From the Main menu, go to Setup menu, select Division, and select Setup Division Environment from the next menu. From the next menu, select "Printer Configuration". Enter "Y" to enable Printers. Enter "Y" to change the Printer Configuration.

The cursor will move to the Printer name and model. Hit the Enter key, and the system will ask whether you want to change "Printer Esc Sequences". Enter "Y". The System will then show different Printing Attributes (bold, italics, ..), with their respective Decimal codes Hit enter until the cursor moves down to "Condense On". The Default code is 027-040-115* 24-072

In order to make the font size larger, the number after the * (asterisk) needs to become smaller. Change 24 to 18 and return back to the Main menu, and try the printing again. You will notice that the Font size has become larger.

### Adjusting the Page Size

If there is an extra page is being printed after each page of text, is could mean that your printer Page Size needs to be adjusted.

Use the above procedure to access the "Printer Escape Sequences", and go to the field entitled "Page Length". Change the number that appears after the * (asterisk) from 66 to 68.

## Personalizing the Micro Florist

It's time to enter shop information and setup screen size, and color, and so on,

### Micro Florist Screen Size

To setup the Micro Florist Screen Size;

- If the Micro Florist is taking the whole screen, press Alt-Enter to turn it into a window.
- Right Click on the Title Bar of Micro Florist window. Go to Properties. Go to Fonts. Select larger Font combinations to change the screen size.

## Customizing Micro Florist

From the Main menu, select the Setup menu. Select Division and press the Enter key. From the next menu, select "Setup Division Business". Please review all areas under this menu, and change them as necessary. Areas to pay special attention are:

- Company Name and Address.
- Rates with respect to Sales Tax, GST (Canada), and Finance Charge rate.

- Customer Account Aging. These setup parameters are already covered in the Billing section and setup in Visual Ticket.

Exit the Business Setup and select "**Setup Division Environment**". Select **Screen Colors** and try different combinations. We recommend the simple Monochrome (White on Black) screen by selecting Color Set # 7. You may try other combinations. Once you exit the "Division Setup" menu the new color selections are activated.

## Search Engine

The Micro Florist Search Engine interface is active when you see the Blinking "?" (question mark). As soon as you see the Blinking ? press **Spacebar** to view the Help page for the Search Engine. The Search Engine provides access to all Posted Databases in the Micro Florist System, standardizing database access (ie the User Interface is always the same).

As you notice on the Help page, you can either navigate in the database, or perform add/modify/delete functions, by using the **F5**, **F3**, **F4** keys. The Search Engine also provides reporting capabilities by using the **F6** or **F8** keys.

If you press the F5 key to add a new record, the system will present you with a form to enter the required information. Pressing F3 to Modify, would use the same form, but this time, allowing you to modify the existing record.

When in the DOS world, the flow is usually one way, from Upper Left to Lower Right. While in the Add/Modify modes, if you need to go back, and change something in the previous fields, you need to first go forward and finish the current editing cycle. Once you are back in the Search Engine (Blinking ?), then press the F3 key again and take care of the change then. This is due to the fact that based on specific selections, the system branches to different fields and subroutines, and going backwards is not always possible. This behavior is referred to as:

- DOS is "Modal" (follows a certain flow) while Windows is Modeless (you can click on any button/field at anytime).

Pressing the Enter key always means that you have found the record you have been looking for and would like to select it and move on to the next step.

Pressing the **F10** (or **Esc**) key always closes the Search Engine, returning you to the previous menu.

Navigating in the database is provided by pressing the up/down arrow keys.

You can also type in the value you are looking for, and the search engine would pull up the record. For example, if the Search Engine is blinking on the Account_Id of a customer, enter 425822 (partial phone number) and hit the Enter key. The Search Engine will take you right to that record. This may sound insignificant, but once you have thousands and thousands of records (hopefully), every one of these features becomes extremely important in locating a customer, an inventory item, or a transaction.

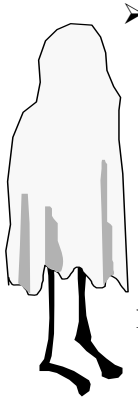
### Practice Session

To practice using the Search Engine, please follow the Void/Modify of Payment on Account transactions discussed in Chapter 8 (Customers and Billing).

Even though you have already setup your Employees using the Visual Ticket's Administration menu. You may want to use the following exercise to become more familiar with Micro Florist User Interface.

### Adding Employees

From the Main menu, select the **Setup** Menu. Select "**Employees**" and press the Enter key. The system activates the Search Engine in the Staff Database, blinking on an employee's Staff_Id (unique identifier)



- Just a reminder not to delete the "SM – System Manager" employee until you have setup another System Manager level employee, and have defined new sessions in Visual Ticket's System Monitor Agent with that employees. Otherwise you may lock yourself out of the system.

Press the **Spacebar** and view the Help page again. To add a new Employee press the F5 key. Enter a two character employee initials (some shops use numbers). Enter the last name, followed by first name. Enter employee's title. The Account Id refers to employees home Phone Number (will also be Employee's Customer Account_Id in Customer Database).

Please remember that you don't have to enter everything about payroll, and address right at this moment. You can always come back and use the **F3** button to modify the record later. For now, we just want to make sure that all of the employee initials are available for Sales Entry/Punch In purposes.

### Access Levels in Micro Florist

For password, select something simple that the employee can remember. If you want to give the Employee "Supervisory" access level, start the password with a $ (dollar sign). If you want to give the employee Manager level access privileges, use

start the password with an "*" (asterisk). To give an employee System Manager Level access (highest access level) start the password with a "." (dot).

Please remember the hint about the "flow" of DOS application, and do not try to go backwards. If you make a mistake entering a particular field, simply continue with the process, and once you have returned to the Search Engine, press the F3 button to modify the record.

Once you have entered all the field, the Search Engine start with the Blinking ? on the new Staff_Id. Hit the Esc (Escape) to exit Search Engine and get back to the menu.

## Activate Password Protection

If you are concerned about unauthorized access to the long term Micro Florist files (Posted Database), then you should consider turning on Password Protection.(otherwise, it will be a pain in the neck having to enter the password every time you want to do something in Micro Florist).

Once you have added some employees with different access levels (based on their Password as mentioned above), you are ready to activate Password protection.

- But before you do this, you should make sure there is at least one employee with password that starts with a "." (dot). Otherwise you may lock yourself out of the system.

From the Main menu, go to the Setup menu, select Division, and select Setup Division Environment. From the next menu, select "System Setup Parameters". Hit the Enter key once, and enter "Y" to enable Password Protection.

## Delivery Service Setup

- Please note there is now a button in the Delivery Zones setup (available from the Setup Manager) that allows you to setup your Delivery Services now in Visual Ticket (see Delivery Zones Setup).

Micro Florist / Visual Ticket treat Drivers (who delivery your products) as Independent Delivery Companies.

Use this section if you need to change the name of a certain Delivery Company or the Default Delivery Charge for that Delivery Company.

From the Main menu, select the Setup Menu. Select "Delivery Setup" and press the Enter key. The system presents you with the "Delivery Setup" menu. Select Delivery Services, and the system activates the Search Engine on the Delivery Service Database, blinking on the Delivery Company #1.

Press F3, to modify the current record. Do not change the Account Id. Hit the Enter key and change the Delivery Service name to "Whatever Delivery". If you use more than one Delivery Service (or Drivers), or if you use Delivery Pool, you need to add those as well. Once you have finished with !D1 account, press the Down Arrow, and see if there is already another record. If so, press the F3 again and make necessary changes. Press F5 if you want to add a new Delivery Service.

Press the Esc (or F10) to close the Search Engine. The next item on the menu is the Delivery Areas (or Delivery Zones), you have already done this one, using the Visual Ticket system (discussed in the Setup Manager - Delivery Zones section).

You may also want to add some of your Frequently Used Addresses in the "Frequent Address" database.

Adding Frequent Address is not critical, since as you start entering orders, you can use "Artificial Intelligence" features of Micro Florist and have the system actually "learn" frequently used addresses based on their frequency of usage.

This is an important point to remember, that once a few weeks have passed, and you have entered a few hundred Recipient addresses, you can come back to this section, and have the system pickup all the address there were used most (i.e.; Frequently Used Addresses) during this period. Having a complete "Frequently Used Address" database, can save your staff a lot of time, and many key strokes, when entering Delivery Information.

But you also simply add addresses to Frequently Used Address database during Order Entry in Visual Ticket, by simply clicking on the little button with a + icon.

## MFS Balance Utility

Please note that the "Balance Cash Register" in Micro Florist's Cash Register menu is for "Processed" (or Posted) sales, and will not take into account standby sales (that have not yet been processed). But, never-the-less, it is a useful utility to balance Posted Sales accounts. Please review the SGT (Self Guided Tour) for details and slides as how that procedure is performed.

# NOTES

# Appendix -6

**Recommended read for:**

1) System Manager

## Trouble Shooting

### Overview

In this chapter provides you with procedures you can use to recover and restore the system in case of file corruptions, virus attacks or human mistakes. These procedures are based on our current experience with systems out in the field, and as new problems/issues are observed, this list is updated to suggest corrective action.

Visual Ticket interruptions can result from Hardware problems, Electric Power Surges or Brown Outs, Windows problems, Network Problems, Printer Problems, Operator Errors, Visual Ticket software problems, Mercury / Dove / Bloomlink Problems, Virus Attacks, and so on,

## File Maintenance (FM)

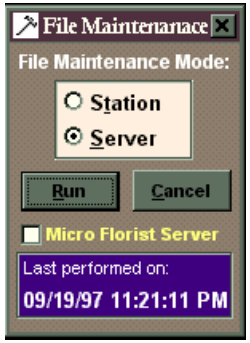
If in doubt always run the following levels of File Maintenance, before you call Tech Support. To run File Maintenance system requires "exclusive" access to the files. This means that you need to close all VT Stations, Agents and Micro Florist that maybe running anywhere on the network.

### VT Server FM

This is a "normal" requirement of the system, and is run at least once a day during Server Shutdown. But if index files are damaged and need updating, or file are out-of-sync with relations in the database container, VT Sever FM must be run on demand (when needed). VT Server FM is also required after installing new updates of Visual Ticket updates.

- File Maintenance is performed on the Central Located VT Server files. Only one station (The VT Server) should run File Maintenance in this mode.

If the experiences a power outage, an accidental system power down, or a windows crash (or Freeze), then it is quite possible that your index files have been left open, and they have become corrupt (this is the minimum that could happen, under these circumstances). Running "Middle of the day" Server File Maintenance is not only recommended, but "required" under these conditions.




- To run VT Server File Maintenance, close Visual Ticket on all stations including the Server, exit all Agents, and close Micro Florist.
- Restart Visual Ticket on the Server, from the Tulip screen (Startup Utility) click on the F button next to the Tulip. Enter Master Password (.MASTER if you haven't changed it). Select Server File Maintenance with Micro Florist Server checkbox checked and click on Run button.

### Station Level FM

If a particular station (other than Station#1 which is the VT server) is acting strange, or has suffered an unusual shutdown, Station Level File Maintenance needs to be performed on stations local files. To run Station Level FM;

- Exist Visual Ticket on that station and shutdown all of the Agents running on that station. You don't have to bother with other stations.
- Restart Visual Ticket on that station, from the Tulip screen (Startup Utility) click on the F button next to the Tulip. Enter Master Password (.MASTER if you haven't changed it). Select Station File Maintenance and click on Run button.

### Micro Florist FM

File Maintenance is also a "normal" requirement of the Micro Florist System, and it is automatically run at least once a month during the Month End routines.

Micro Florist checks File Integrity at startup (while the Sliding Logo is displayed). It opens every file at this point, and verifies that it is still usable. If it is not usable, it will do it's best to repair the file, and if the problem persists, it will prompt you to certain repair utilities. In this case you need to call Tech Support and let us take it from here.

But usually just starting Micro Florist and running File Maintenance in the Normal mode takes care of 90 % of possible problems.

- To run MF File Maintenance, start the Micro Florist from the Main menu, go to the **Setup** menu, select "**File Maintenance**", and run it in the "**N**" (Normal) mode.

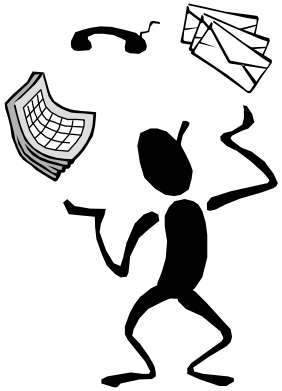
**NOTE** We recommend that you run MFS File Maintenance before running VT Server File Maintenance. This is due to the fact that Micro Florist can actually repair its own files (given that they are in repair condition), if and when they are damaged. This will insure that VT will not encounter corrupt MFS files.

## VT Issues an Error

Visual Ticket deploys an extensive and sophisticated Error Trapping routines, and the Error Reports can help us quickly trouble-shoot most of the problems, that may occur.

Visual Ticket errors do not necessarily mean there is a problem in the software itself. Visual Ticket issues an error, whenever there is any kind of problem running the system, which can consist of Network File access problems, disk problems, printer problems, and so on.

Whenever Visual Ticket issues an error, always print the very first Error Report. and ignore all subsequent ones (if you are prompted to do so again).



## Recovering from Windows Crash

When Microsoft Windows freezes, or when the system is rebooted by mistake, there is a good chance that the system may report "Database file is unusable". The first thing you need to do, is to insure that it never happens again.

When shutting down Windows, if there is a satellite station still connected to the Server, Windows will open a dialog box to inform you that "There is another User still connected to the Network"'. Please take this message very seriously. Always close (power down) stations BEFORE the server.

Both the Visual Ticket system and the Micro Florist system have their own File Repair utilities. The Micro Florist system checks file integrity (for all files located in the \SMS\SET1) directory, every time the system is started. This actually occurs right after when the Logo of Micro Florist (the moving windows) is displayed. If the system encounters a corrupt database file, it will inform you which file has been damaged, and will then prompt you to the Repair file. Please note that Micro Florist Server files include all "Posted" sales, transactions, customer, inventory, and all resource files.

The Visual Ticket system checks file integrity when it run the Server File Maintenance, which is performed automatically by the Nightly Agent during the Server Shutdown process. Once a damaged file is encountered, the system will inform the name of the file in question, and will then attempt to fix it.

Both Micro Florist, and Visual Ticket can fix about 90% of all damaged files, unless the file is really gummed up. When you have experienced a System Crash or have rebooted the system by mistake, please make sue you perform the following steps: before you call Tech Support.

- Shutdown Windows, and restart it. This will insure that Windows Operating System is reloaded, and any unstable components have been reset.
- Run Scan Disk (Disk Check Utility). Scan Disk on Win95, 98 is available from the Start menu, by going to Programs, Accessories, System Tools folder. In Windows NT, 2000, XP it is available when you right click on the Drive from My Computer. Go to Properties, go to Tools and invoke Disk Checking. It will run it, after you reboot the system.
- Run the shortcut for C:\SMS\CLEANUP.BAT
- Start Micro Florist system, and let it reach the Main menu. Once you get there, you will know that Micro Florist files are in good shape. Go to Setup menu, go to File Maintenance and run it in Normal mode. Then use the "Close" menu, and "Close Shop with no backups".
- Start Visual Ticket. Click on "F" button next to the Tulip, and run Server Level File Maintenance. Once the Visual Ticket File Maintenance is completed, you know the Visual Ticket files, are also OK.

## Can not access File (or file does not exist)

Your Network connection has been lost. First go to "My Computer" window and double click on the disk in question (usually the Server disk). If it comes up, then you have just fixed the problem.

If it says, "access to this disk is not available", then go to the "Network Neighborhood" window, and see if all the work stations on the Network are listed. If not, call your Network administrator.

## File Access is Denied

The Sharing of the Server Disk has been altered, and you don't have Full Access. See Disk Sharing and Mapping in Appendix -1.

# Damaged Data Files

## Memo File is unusable (or missing)

This is a result of system reboot while Visual Ticket has its files open (technically referred to as "Gummed Up" files!).

First thing you must do, is to insure that this will never ever happen again. Now, luckily VT comes with two utilities that do fix most of these types of damages. VT loads the utilities and tries to fix the problem.

In this case, you are given 2 options of running either the "Memo Scan" or "Data Scan". We recommend that you use the "Memo Scan" utility first, and if the problem persisted, then try the "Data Scan". In this mode the Memo Scan has already opened when you get in.

You can also run the "Memo Scan" utility from outside of VT. From Server Desktop make a shortcut to

C:\SMS\VFT\MEMOSCAN.EXE

Run this program. Then from the File menu load the particular file the system is complaining about (it is usually in C:\SMS\VFT\DATA directory).

Once the file is loaded, click on the button that has the picture of Chain (links). Memo Scan analyzes the file, and reports possible problems.

If it lists problems, then click on the button with a picture of at man who we call "the Expert". "Memo Scan" will try its very best to fix the identified problems. Quit "Memo Scan", restart Visual Ticket to see if the problem has gone away. The "Data Scan" utility can only be run internally under Visual Ticket control, In other words, you can not run the "Data Scan" in stand alone mode (outside of Visual Ticket itself).

## Recovering From Backup

If the problem persists, then recover from last night's backup. Backups are located in c:\smsbak\vt1 through c:\smsbak\vt3 (the system rotates the target backup directory). You should consider using this feature when Data files have become so damaged that none of the automatic fix utilities embedded in the Visual Ticket system are able to restore the files.

In order to use this feature, the Server Shutdown (on the File menu) feature should have been used at the end of each session. The Server Shutdown feature backs up the VT data in 3 alternating folders. The Recover Utility searches the 3 backup directories and automatically determines the last one containing the latest set of data files. Thus it is important not to use the Server Shutdown, once the data has become corrupt.

It is important to note that when recovering from backup, any new information entered since the last back up is lost. Visual Ticket files contain relational tables that are inter-related, thus any recovery from back up must be performed on the entire set of files (unless instructed by Micro Florist Technical Support).

In order to activate this feature your system must be able to reach the Startup utility (AKA the Tulip form). If the damage is so severe that the system is unable to reach the Startup utility, then the Recovery from backup must be performed manually (see below).

### Automatic Backup Recovery

To access the "Backup Recovery Utility", locate the little button labeled "R" on the Startup utility (the Tulip form) on the lower right hand corner of this form.

Once you click on this button, the system prompts you to enter the Master Password. The master password in the factory setup of Visual Ticket is ".MASTER" (dot master).

The Backup Recovery utility will determine the folder containing the last set of data files, will then save the current data in the c:\trash directory, and will then proceed to copy the files from the backup directory on to the c:\sms\vft\data directory.

Once the data is copied from backup, the system runs File Maintenance, and tests the integrity of the recovered data.

If the data in the backup directory was in good condition, the system will not produce an error, indicating that the recovery process has been successful (congratulations).

### Manual Backup Recovery

Use Windows Explorer, locate the c:\smsbak\vt directories, and check the file dates in VT1, VT2, and VT3 directories, and copy the appropriate set of files into the c:\sms\vft\data folder. We strongly recommend that you save the original files in the data directory in a temporary directory such as c:\trash just in case.

# INDEX


Account Sale, xvi, 25, 26, 29, 31, 37, 38, 41, 42, 43, 44, 45, 46, 48, 49, 50, 58, 74, 75, 88, 90, 114, 115, 116, 118, 122, 124, 126, 127, 128, 129, 132, 134, 136, 137, 149, 170, 171, 175, 177, 178, 179, 187, 188, 214, 232, 256, 258, 261, 278
Accounting Interface Module, xvi, 26, 39, 54, 55, 73, 80, 88, 90, 197, 201, 202, 204, 206, 209, 212, 270
Adjusted Price, 138, 146, 152, 258
Administration Menu, 21, 24, 36, 45, 46, 49, 73, 78, 107, 115, 119, 125, 127, 137, 140, 146, 147, 152, 193, 202, 214, 217, 251, 253, 267, 278
Agent, xvii, xviii, 51, 52, 67, 68, 69, 186, 268
Agents, xvi, xvii, xviii, xix, 21, 23, 25, 26, 28, 37, 39, 40, 42, 43, 49, 51, 52, 53, 55, 57, 59, 61, 77, 78, 98, 107, 115, 135, 136, 137, 138, 145, 147, 148, 149, 152, 153, 154, 155, 163, 164, 165, 166, 168, 170, 171, 174, 181, 183, 184, 185, 186, 187, 188, 189, 190, 197, 198, 202, 204, 206, 208, 210, 212, 214, 217, 219, 231, 233, 234, 237, 239, 250, 251, 254, 259, 265, 266, 267, 268, 269, 270, 271, 272, 273, 278
Aging, 127, 128, 129, 130, 133, 134, 136, 278
AIM, xvi, 26, 54, 55, 73, 80, 90, 197, 198, 199, 200, 201, 202, 203, 204, 205, 206, 207, 209, 210, 211, 212
Archived Orders, 51, 52, 54, 122, 168, 226, 268, 271
Attention Flag, xvi, 53, 55, 56, 69, 70, 162
Auto-Select, 59, 155, 156
Average Purchase, 31, 41, 42, 44, 45, 49, 74, 75, 122, 124, 178, 179, 256, 258, 261
Balance Utility, xvi, 21, 26, 27, 43, 51, 55, 56, 58, 66, 73, 77, 78, 79, 80, 81, 84, 86, 88, 90, 197, 203, 204, 207, 211, 212, 213, 253, 266, 267, 279
Barcode, 32, 33, 71, 95, 97, 100, 101, 102, 105, 107, 108, 109, 110, 137, 138, 140, 238, 258
Barcode Automation, 97, 101, 109, 110
Batch Mode, 94, 102, 103, 104
BBS, 250
Billing, xv, xvi, 26, 45, 46, 47, 52, 55, 58, 81, 82, 86, 88, 91, 92, 93, 94, 126, 127, 128, 129, 130, 132, 133, 134, 135, 136, 165, 168, 169, 171, 173, 197, 236, 255, 278
Bitmap, 34, 90, 91, 133, 138, 193, 196, 263
Bloomlink, xvii, xviii, 26, 28, 55, 60, 62, 85, 93, 138, 155, 158, 161, 230, 243, 245, 247, 248, 269, 281
Browser Form, 46, 47, 48, 49, 50, 51, 54, 55, 56, 62, 63, 66, 67, 70, 74, 75, 107, 109, 123, 124, 125, 160, 163, 173, 225
Calculated Fields, 73, 197, 198, 199, 203, 205, 206, 207, 209, 210, 211, 212
Canada, 24, 36, 71, 72, 167, 192, 252, 277
Cash Register Accounts, 27, 43, 73, 77, 78, 79, 80, 81, 84, 86, 203, 211, 212, 213, 267
chart, xvii, xviii, 197, 208, 209, 214, 215, 217, 218, 268
Chart Agent, xvii, xviii, 214, 217, 218, 268
Choice_2, 31, 32, 34, 35, 95, 98, 143
Chouce_1, 31, 32, 34, 35, 95, 98, 143
Cleanup, 168, 224, 245, 271
Combined Form, 31, 34, 35, 68, 111, 257
Combined Ticket, xviii, 26, 35, 68, 234, 236, 237, 238, 257, 260
Credit Card Slip, 33, 40, 227, 240
Customer Form, 45
CyberCash, 243, 244
Daily Agent, xvii, xviii, 51, 52, 67, 68, 69, 186, 268
Data Source, 154, 174, 175, 176, 177, 178
Defaults, xvi, xvii, xviii, xix, 26, 29, 31, 32, 33, 34, 36, 37, 38, 41, 42, 43, 44, 62, 63, 68, 71, 74, 75, 92, 104, 107, 115, 120, 125, 127, 135, 138, 146, 147, 152, 166, 169, 172, 173, 174, 178, 184, 197, 198, 200, 203, 206, 208, 209, 219, 236, 237, 238, 251, 252, 253, 254, 255, 257, 258, 260, 262, 266, 267
Delivery Form, 31, 32, 34, 35, 37, 151, 152
Delivery Ticket, xviii, 26, 38, 43, 53, 54, 57, 93, 100, 101, 108, 124, 177, 180, 233, 234, 236, 237, 238
Delivery Tracking, xvii, xix, 35, 38, 68, 95, 96, 97, 99, 100, 101, 102, 104, 105, 107, 109, 110, 154, 161, 168, 171, 184, 185, 187, 246, 253
Dialup Networking, 183, 219, 236
Direct Pay, 248, 269
Division, 25
Divisions, 25, 43, 47, 57, 62, 63, 69, 78, 81, 82, 84, 86, 87, 88, 123, 127, 128, 130, 139, 155, 159, 164, 165, 184, 186, 187, 188, 201, 203, 210, 211, 223, 234, 235, 236, 239, 246, 248, 255, 257, 259, 260, 266, 277, 278, 279
Dove, xvii, xviii, 26, 28, 39, 51, 52, 55, 59, 60, 61, 62, 64, 85, 94, 138, 155, 158, 159, 160, 230, 239, 243, 245, 247, 248, 265, 269, 281
Email, 42, 65, 81, 91, 92, 120, 126, 134, 135, 166, 167, 168, 169, 170, 172, 173, 213
eManager, xvi, xviii, 42, 45, 65, 81, 82, 90, 92, 101, 115, 120, 126, 134, 135, 136, 145, 153, 165, 166, 167, 168, 169, 170, 171, 172, 173, 174, 180, 181, 189, 197, 202, 204, 208, 212, 213, 214, 270, 272
Emanager, 135, 136, 145, 153, 165, 166, 167, 168, 170, 171, 172, 174, 197, 202, 204, 208, 212, 214
Employee Time Entry, 149, 150, 151
Enclosure Card, xviii, 26, 35, 36, 37, 38, 43, 50, 57, 70, 164, 165, 177, 180, 222, 227, 234, 236, 237, 238, 240, 241, 257
Enclosure Card Form, xviii, 26, 35, 36, 37, 38, 43, 50, 57, 70, 164, 165, 177, 180, 222, 227, 234, 236, 237, 238, 240, 241, 257, 259
Encryption, 185, 190
Event Worksheet, 98, 141, 142, 143, 191, 193, 194, 195, 196, 263, 264
Excel, 30, 81, 86, 91, 92, 113, 133, 163, 175, 177, 197, 198, 199, 200, 202, 205, 215, 216, 226, 233, 267
Expand Grid, 30, 31, 33
Faxing Orders, 64, 65, 122, 176, 185, 250
File Maintenance, xvii, xviii, 23, 24, 25, 75, 89, 103, 117, 225, 231, 253, 266, 270, 281, 282, 283, 284
Flora Map, 38, 99, 100, 105, 108, 229, 234
Frequent Address, 38, 193, 252, 279
Fuzzy Search, 45, 55, 56, 111, 112, 223
General Sale, 25, 29, 30, 32, 36, 44, 47, 48, 49, 50, 74, 124, 126, 135, 145, 173, 178, 256
GL Transactions, 27, 43, 73, 77, 78, 79, 80, 81, 84, 86, 203, 211, 212, 213, 267
Global Item Counter, 137, 138, 139, 146, 253, 284
GST, 24, 49, 71, 72, 88, 116, 135, 138, 145, 153, 163, 192, 277
HST, 71, 72
Icverify, 243, 244, 245
IIF, 26, 39, 54, 73, 117, 135, 136, 145, 153, 154, 174, 175, 177, 197, 198, 199, 200, 201, 202, 204, 205, 206, 208, 209, 210, 211, 212, 215, 216
Instant Approval, xx, 26, 28, 41, 42, 120, 162, 220, 222, 243
Inventory, xvi, 25, 26, 34, 36, 39, 49, 83, 85, 93, 98, 107, 109, 123, 137, 138, 139, 140, 141, 142, 144, 145, 146, 152, 163, 185, 187, 193, 195, 197, 206, 207, 226, 231, 232, 253, 258, 261, 263, 264, 270, 275

Invoice, 34, 40, 43, 86, 90, 93, 110, 120, 121, 122, 123, 124, 127, 129, 130, 131, 132, 133, 134, 168, 169, 173, 227, 228, 229, 234, 236, 237, 238, 255, 257, 266
Invoices, 26, 53, 92, 93, 117, 121, 127, 128, 132, 133, 227, 277
Line Item Menu, 30, 31, 33
Login, 24, 28, 78, 109, 110, 147, 148, 232, 251, 253, 264
Mail Merge, 45, 94, 113, 174, 175, 176, 177, 178, 180, 227
Mercury Direct, xx, 39, 61, 159, 162, 243, 245, 246, 269
Mercury Receive, 52, 269
Mercury Send, 39, 61, 265, 269
Mercury System, xvii, xviii, xx, 26, 28, 29, 36, 39, 51, 52, 55, 59, 60, 61, 62, 64, 70, 85, 94, 138, 155, 158, 159, 160, 162, 186, 187, 230, 239, 243, 245, 246, 247, 248, 265, 269, 281
Message System, xv, 45, 94, 113, 126, 151, 171, 172, 174, 175, 176, 177, 178, 180, 227, 267
Monitor Agent, xviii, 23, 28, 77, 78, 147, 148, 152, 219, 231, 251, 254, 259, 265, 266, 267, 269, 278
News, 82, 219
Nightly Agent, xviii, 28, 122, 168, 170, 171, 198, 202, 205, 206, 253, 267, 268, 270, 271, 283
Occasions, 37, 45, 94, 115, 125, 137, 165, 167, 168, 169, 171, 175, 176, 177, 179, 180, 181, 189, 197, 256
Operations Menu, xv, xvii, 24, 39, 50, 61, 62, 66, 69, 70, 84, 91, 95, 96, 97, 99, 101, 105, 107, 154, 162, 168, 171, 183, 184, 197, 218, 225, 239, 253, 255, 268
Order Pad, 31, 32, 34, 35, 36, 37, 40, 95, 98, 111, 143
Order Pad Status, 26, 51, 66, 67, 69, 70, 90, 91, 104, 107, 109, 135, 136, 145, 153, 166, 168, 171, 174, 183, 197, 202, 204, 208, 212, 214, 225, 268
Orphan Orders, 225
Other Info Form, xvi, xvii, 21, 25, 32, 43, 47, 55, 62, 63, 68, 84, 107, 148, 178, 179, 186, 234, 236, 238, 239, 256, 257, 259
Output Files, 198, 204
Paid Services, xix, xx, 220, 223, 243
Passwords, xviii, xix, 21, 23, 25, 40, 46, 57, 78, 97, 102, 110, 116, 118, 123, 124, 136, 145, 147, 149, 150, 151, 166, 168, 189, 220, 224, 230, 232, 243, 245, 246, 253, 267, 275, 279, 281, 284
Payment Form, 31, 40
Payment on Account, 42, 58, 79, 119, 120, 121, 169, 171, 194, 195, 203, 240, 278
Posted Sales, xv, xvi, xvii, 21, 47, 48, 49, 52, 53, 54, 62, 83, 86, 87, 88, 89, 93, 123, 124, 125, 126, 130, 163, 179, 198, 203, 210, 215, 218, 279
Power Modules, 82, 90, 91, 93, 116, 134, 135, 136, 145, 154, 163, 181, 213, 214, 217
Prep Form, 31, 32, 34, 35, 95, 98, 111, 143
Price Check, 34, 138, 146, 258
Price Checking, 138, 146, 258
Print Agent, xvii, xviii, 35, 37, 40, 43, 51, 52, 57, 62, 63, 89, 108, 120, 164, 165, 184, 187, 225, 233, 234, 235, 236, 237, 239, 241, 255, 257, 265, 272, 273, 276
Print Jobs, 34, 36, 40, 42, 43, 53, 56, 57, 67, 71, 82, 86, 90, 93, 95, 101, 109, 110, 120, 121, 122, 123, 124, 127, 129, 130, 131, 132, 133, 134, 168, 169, 171, 173, 177, 180, 187, 225, 227, 228, 229, 234, 236, 237, 238, 255, 257, 266
Print Requests, xviii, 36, 37, 38, 57, 58, 68, 69, 70, 97, 187, 234, 236, 237, 238, 239, 257, 272
Printer Control File, 235
Problem Tracking, 43, 107, 109
Process Agent, xvi, 21, 25, 26, 42, 43, 49, 51, 52, 53, 55, 59, 98, 115, 137, 138, 154, 163, 187, 198, 206, 210, 265, 267, 268, 270
Processing Parameters, 26, 33, 48, 51, 52, 66, 69, 70, 97, 186, 213
Production Tracking, xvii, 35, 36, 85, 86, 95, 96, 97, 98, 101, 102, 103, 104, 109, 141, 142, 143, 184, 185, 187, 232, 253, 264
Prompter, xviii, 29, 147, 151, 152, 251, 266, 267
PST, 71, 72
Purged Orders, 48, 49, 50, 51, 52, 124, 186, 254, 268
Quantity Check, 34, 146, 258
Quantity Checking, 146, 258
Quick Cash, 26, 29, 32, 33, 41, 42, 49, 74, 75, 124, 178, 179, 219, 223, 224, 258, 259, 260
QuickBooks, xvi, xviii, 26, 54, 80, 90, 150, 197, 198, 199, 200, 201, 202, 204, 205, 206, 208, 209, 210, 211, 212, 216
QuickCash, 26, 29, 32, 33, 41, 42, 49, 74, 75, 124, 178, 179, 219, 223, 224, 258, 259, 260
RAS, 184
Recovery, xvi, xvii, xviii, xx, 25, 26, 28, 51, 53, 58, 63, 66, 67, 75, 88, 89, 122, 145, 154, 168, 170, 171, 185, 187, 188, 194, 198, 200, 201, 202, 205, 206, 211, 224, 225, 236, 247, 248, 267, 269, 270, 271, 281, 283, 284
Reduce Grid, 30, 31, 33
Refund/Returns, 32
Repeat, xv, xvi, xvii, 21, 38, 40, 47, 48, 49, 50, 52, 53, 54, 62, 68, 69, 71, 79, 83, 86, 87, 88, 89, 93, 123, 124, 125, 126, 130, 155, 157, 163, 168, 179, 191, 193, 198, 203, 210, 215, 217, 218, 277, 279
Repeating Orders, 38, 40, 48, 49, 50, 68, 69, 71, 79, 123, 125, 155, 157, 168, 217, 277
Reports, xvi, 27, 39, 52, 53, 55, 56, 70, 77, 79, 81, 82, 83, 84, 85, 86, 87, 88, 89, 90, 91, 92, 93, 94, 97, 98, 117, 126, 130, 133, 134, 139, 144, 151, 154, 159, 161, 179, 197, 206, 207, 213, 215, 222, 223, 226, 233, 234, 248, 250, 267, 276, 277, 282
Server Shutdown, xvi, xvii, xviii, 25, 26, 28, 51, 53, 58, 63, 66, 67, 75, 88, 89, 122, 145, 154, 168, 170, 171, 185, 187, 188, 194, 198, 200, 201, 202, 205, 206, 211, 225, 236, 267, 269, 270, 271, 281, 283, 284
Service Items, 137, 138, 139, 140, 263
Sessions, xvi, xviii, 46, 77, 91, 126, 127, 129, 146, 147, 170, 174, 189, 254, 258, 266
Spooler, 233
Standard Inventory Items, 137, 139, 142
Standby Orders, xviii, 26, 31, 36, 40, 41, 47, 51, 52, 66, 67, 68, 69, 70, 86, 97, 125, 138, 194, 213, 239, 255, 268
Standing Orders, 50, 52, 68, 69, 70
Statements, 26, 53, 93, 117, 127, 128, 130, 132, 133, 227, 277
Street Wizard, 38, 70, 99, 100, 104, 105, 106, 107, 109, 135, 136, 145, 153, 166, 168, 171, 174, 183, 197, 202, 204, 208, 212, 214, 229, 234
Submitting Orders, xix, 25, 30, 32, 33, 51, 52, 54, 57, 61, 70, 73, 110, 120, 150, 161, 186, 187, 256, 268
Summary Screen, 256
Technical Support, xix, xx, 82, 87, 91, 114, 219, 236, 247, 250, 284
Templates, 49, 50, 53, 68, 69, 70, 71, 81, 89, 92, 117, 129, 132, 133, 135, 164, 167, 168, 172, 173, 174, 175, 177, 178, 222, 223, 225, 235, 237, 239, 240
Ticket Format, 227, 235, 237, 238, 240, 276
Ticket Formats, 222, 236, 238, 240
Tickets, xviii, 26, 33, 34, 35, 36, 37, 38, 40, 42, 43, 50, 53, 54, 57, 58, 68, 70, 71, 73, 82, 93, 95, 97, 100, 101, 108, 117, 120, 124, 134, 141, 142, 162, 164, 165, 168, 169, 171, 177, 180, 189, 194, 222, 227, 228, 233, 234, 235, 236, 237, 238, 240, 241, 255, 257, 259, 260, 277
Trouble Shooting, xvii, xviii, 23, 24, 25, 75, 89, 103, 117, 225, 231, 253, 266, 270, 281, 282, 283, 284
Visual Billing Module, 127, 128, 130, 131, 132, 133, 134
Visual Ticket, xv, xvi, xvii, xviii, xix, xx, 21, 23, 25, 28, 29, 50, 57, 61, 62, 63, 64, 65, 78, 92, 93, 94, 95, 96, 99, 101, 106, 109, 115, 122, 128, 137, 149, 151, 155, 158, 164, 165, 171, 174, 176, 179, 180, 183, 189, 193, 197, 201, 203, 209, 219, 224, 225, 227, 228, 229, 230, 231, 233, 234, 235, 236, 243, 244, 245, 247, 248, 249, 250, 251, 254, 258, 265, 267, 270, 275, 276, 281, 282, 284
Visual Ticket News, 82, 219
VOX Agent, xvii, xviii, 25, 28, 55, 107, 135, 136, 145, 149, 153, 155, 166, 168, 170, 171, 174, 181, 183, 184, 185, 186, 187, 188, 189, 190, 197, 202, 204, 208, 212, 214, 239, 272
Wire Services, xvi, 24, 29, 34, 39, 55, 59, 60, 61, 62, 63, 65, 72, 87, 94, 137, 138, 155, 156, 157, 158, 159, 160, 162, 186, 232, 246, 248, 250, 251, 254, 255, 275, 276
Wirein Sale, 34, 35, 37, 38, 39, 138
Wireout Assignments, 58, 59, 61, 62, 63
Wireout Items, 137
Wireout Sales, xvi, xvii, 24, 25, 31, 32, 34, 37, 38, 39, 58, 59, 61, 62, 63, 67, 72, 85, 113, 137, 139, 140, 155, 156, 158, 177, 187, 197, 206, 213, 214, 217, 234, 250, 255, 269
Work Ticket, xviii, 26, 36, 43, 57, 58, 68, 95, 97, 108, 117, 141, 142, 194, 234, 236, 237, 238, 257
Z-Report, xvi, 26, 58, 80, 81, 89, 90, 91, 92, 144, 163