

Customer Master Training Guide



Notes:

Customer Master Training Guide

This guide describes how to create and maintain new customer numbers, billing and shipping addresses for customers, salesman and commission info, along with customer groups, customer classes, and other customer specific details.

From the main system selector go into File Maintenance, and then the Customer Related Files Menu.

Account:39 BASE.12 Port:039 Menu:CUST.MAINT Capture:On											
Customer Related Files											
Maintain							Listing				
	1. Alpha Customer						21. Alpha Customer				
	2. Change Alpha Cust#										
	3. Customer / Ship to										
	4. Country Code Maintenance						22. Country				
	5. State Code Maintenance						23. State Code				
	6. Salesman						24. Salesman				
	7. Customer Type						25. Customer Type				
	8. Customer Class						26. Customer Class				
	9. Customer Group						27. Customer Group				
	10. Service Charge						28. Service Charge				
	11. Tax Rate						29. Tax Rate				
	12. Terms						30. Terms				
	13. Territory						31. Territory				
	14. Shipping Menu										
	15. Mailing System						32. Mailing System				
	16. Prospect Master						33. Prospect Master				
	17. Order Template Menu						34. Label Menu				
	18. Commission Type						35. Commission Type				
	19. Facility						36. Facility				
	20. GPO						37. GPO				
Enter Selection or END :											
CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU			
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off		Popup	

Notes:

Account:54 BASE.12 Port:054 Menu:CUST.MAINT Capture:On

Customer Related Files

Maintain		Listing	
	1. Alpha Customer		21. Alpha Customer
	2. Change Alpha Cust#		
	3. Customer / Ship to		
	4. Country Code Maintenance		22. Country
	5. State Code Maintenance		23. State Code
	6. Salesman		24. Salesman
	7. Customer Type		25. Customer Type
	8. Customer Class		26. Customer Class
	9. Customer Group		27. Customer Group
	10. Service Charge		28. Service Charge
	11. Tax Rate		29. Tax Rate
	12. Terms		30. Terms
	13. Territory		31. Territory
	14. Shipping Menu		
	15. Mailing System		32. Mailing System
	16. Prospect Master		33. Prospect Master
	17. Order Template Menu		34. Label Menu
	18. Commission Type		35. Commission Type
	19. Facility		36. Facility
	20. GPO		37. GPO

Enter Selection or END :

CONTACTS	MAINT	DRILL	EXECING	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU	
HELP	OK/END	INSERT	LDELETE	PREV.PG	NEXT.PG	INQUIRY	CANCEL	Off	Popup

Customer Related File Maintenance Function Keys

The first 12 function keys on your keyboard (F1-F12) are reserved for special functions in the MDS master file maintenance programs. They appear on the last line of the screen as follows:

HELP - The HELP function is available by clicking on the 'HELP' icon or by pressing the 'F1' function key. Help text is setup as two layers. By pressing 'F1' at the first field on the screen, an overall description of the master file will be displayed. If 'F1' is pressed at a specific field within the master file, a detailed description of the field and its' use will be displayed.

OK/END - The OK/END function is available by clicking on the 'OK/END' icon, pressing the 'F2' function key, or by typing in the word 'END' and hitting <ENTER>. This function acts as an "accept" within a record.

INSERT - The INSERT function is available by clicking on the 'INSERT' icon or by pressing the 'F3' function key. The INSERT mode feature allows insertion of letters or numbers into existing text. For example, if in the master file and you wish to insert additional words into a description field or correct a spelling error, you may use the insert function to do so, rather than retype the text.

LDELETE - The LINE DELETE function is available by clicking on the 'LDELETE' icon or by pressing the 'F4' function key. The LDELETE function allows you to delete a line from the master file. Simply bring the cursor to the line you wish to delete, and click or press 'F4'.

PREV PAGE - The PREVIOUS PAGE function is available by clicking on the 'PREV PG' icon or by pressing the 'F5' function key. This function would be used for master files which contain multiple input screens and will allow easy paging to additional screens. This function can be used simultaneously with the PREV PG function to move back and forth between the screens.

Notes:

Account:54 BASE.12 Port:054 Menu:CUST.MAINT Capture:On									
Customer Related Files									
Maintain	1. Alpha Customer	Listing	21. Alpha Customer						
	2. Change Alpha Cust#								
	3. Customer / Ship to								
	4. Country Code Maintenance		22. Country						
	5. State Code Maintenance		23. State Code						
	6. Salesman		24. Salesman						
	7. Customer Type		25. Customer Type						
	8. Customer Class		26. Customer Class						
	9. Customer Group		27. Customer Group						
	10. Service Charge		28. Service Charge						
	11. Tax Rate		29. Tax Rate						
	12. Terms		30. Terms						
	13. Territory		31. Territory						
	14. Shipping Menu								
	15. Mailing System		32. Mailing System						
	16. Prospect Master		33. Prospect Master						
	17. Order Template Menu		34. Label Menu						
	18. Commission Type		35. Commission Type						
	19. Facility		36. Facility						
	20. GPO		37. GPO						
Enter Selection or END :									
CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU	
HELP	OK/END	INSERT	LDELETE	PREV.PG	NEXT.PG	INQUIRY	CANCEL	Off	Popup

Customer Related File Maintenance Function Keys

NEXT PG – The NEXT PAGE function is available by clicking on the 'NEXT PG' icon or by pressing the 'F6' function key. This function would be used for master files which contain multiple input screens and will allow easy paging to additional screens. This function can be used simultaneously with the PREV PG function to move back and forth between the screens.

INQUIRY – The INQUIRY function is available by clicking on the 'INQUIRY' icon or by pressing the 'F7' function key. This function allows the operator the flexibility to display items in the master file already entered and to display other master files used within the file being created. Example: The Product Master file. At the first prompt for product number, if the operator clicks on the 'INQUIRY' icon or 'F7' is pressed the inquiry can be made to display products on file (to eliminate duplication). If you click on the 'INQUIRY' icon or press the 'F7' function key at another field, for example, product type (which is another master file) the system will display product types on file to help the operator in selecting which product type best fits the product being created. As you can see the inquiry function can be a very useful tool when creating or maintaining master files.

CANCEL – The CANCEL function is available by clicking on the 'CANCEL' icon or by pressing the 'F8' function key. This function is used to end a program without applying changes or additions made and should only be used if you DO NOT want the changes to be updated to the file. If used, the record will be filed as it was before the operator accessed it, in other words, as though no changes were made.

Off – The Off function is available by clicking on the 'Off' icon or by pressing the 'F9' function at any menu. This function will disconnect your session from WinMDS.

Popup – The Popup function is available by clicking on the 'Popup' icon or by pressing the 'F12' function key. This function will bring up a custom menu with personally specified menu options.

Notes:

Account:54 BASE.12 Port:054 Menu:CUST.MAINT Capture:On

Customer Related Files

Maintain		Listing	
	1. Alpha Customer		21. Alpha Customer
	2. Change Alpha Cust#		
	3. Customer / Ship to		
	4. Country Code Maintenance		22. Country
	5. State Code Maintenance		23. State Code
	6. Salesman		24. Salesman
	7. Customer Type		25. Customer Type
	8. Customer Class		26. Customer Class
	9. Customer Group		27. Customer Group
	10. Service Charge		28. Service Charge
	11. Tax Rate		29. Tax Rate
	12. Terms		30. Terms
	13. Territory		31. Territory
	14. Shipping Menu		
	15. Mailing System		32. Mailing System
	16. Prospect Master		33. Prospect Master
	17. Order Template Menu		34. Label Menu
	18. Commission Type		35. Commission Type
	19. Facility		36. Facility
	20. GPO		37. GPO

Enter Selection or END :

HELP	CONTACTS OK/END	MAINT INSERT	DRILL LDELETE	EXECINQ PREV PG	REPORTS NEXT PG	CAPT OFF INQUIRY	VIEW CANCEL	CRM.MENU Off	VRM.MENU	Popup
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Customer Related File Maintenance Function Keys

The top row function keys on your keyboard <Shift>+(F1-F8) are reserved for special functions in the MDS master file maintenance programs.

These function keys change in each of the programs that you are in. For example, Product File Price Maintenance's top row of function keys will be different than Batch Price Changes – by Vendor's top row of function keys.

CONTACTS - The CONTACTS function is available by clicking on the '**CONTACTS**' icon or by pressing the Shift+'F2' function key. This will bring the user to the Contacts inquiry.

MAINT - The MAINTENANCE function is available by clicking on the '**MAINT**' icon or by pressing the Shift+'F3' function key. This will bring the user to the File Maintenance menu.

DRILL - The DRILL function is available by clicking on the '**DRILL**' icon or by pressing the Shift+'F4' function key. This will bring the user to the Drill Down menu.

EXECINQ - The EXECUTIVE INQUIRY is available by clicking on the '**EXECINQ**' icon or by pressing the Shift+'F5' function key. This will bring the user to the Executive Inquiry.

REPORTS – The REPORTS module is available by clicking on the '**REPORTS**' icon or by pressing the Shift+'F6' function key.

CAPT OFF - The CAPTURE OFF function is available by clicking on the '**CAPT OFF**' icon or by pressing the Shift+'F7' function key. This will disable all available reports from going to Report Capture.

VIEW - The VIEW function is available by clicking on the '**VIEW**' icon or by pressing the Shift+'F8' function key. This will forward the user to Report Capture and display all reports previously ran.

CRM.MENU – The CRM.MENU function is available by clicking on the '**CRM.MENU**' icon or by pressing the Shift+'F9' function key. This will forward the user to the Customer Relationship Management menu.

VRM.MENU – The VRM.MENU function is available by clicking on the '**VRM.MENU**' icon or by pressing the Shift+'F10' function key. This will forward the user to the Vendor Relationship Management menu.

Notes:

ALPHA CUSTOMER MAINTENANCE

CUST NAME KESSLER

1.CUST NO 100197

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Alpha Customer Maintenance

This file contains the alphanumeric customer 'Number' which is used as the primary access method to obtain the customer master and detail records. All customer numbers sharing the same acronym are stored in value marked attribute 1. The various input programs access these values sequentially until the correct customer is located. This program is used to add an additional external number to the customer number for an existing customer. It can also be used to add internal customers to access existing alpha customers.

CUST NAME – At the customer name prompt you can enter the customer number, enter the beginning customer number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

CUST NO - Enter the internal number for the customer. The internal customer number is unique to the customer. The external number is the number commonly known and used by the MDS user. The internal number is the system assigned number. You can have more than one customer number.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

ALPHA	CUSTOMER	NUMBER	MAINTENANCE
OLD ALPHA CUST #	KESSLER		
INTERNAL CUST #	100197		
NEW ALPHA CUST #	<input type="text"/>		

r1r

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Change Alpha Cust# Maintenance

OLD ALPHA CUST# - Enter the old alpha customer number. You can enter the beginning customer number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

INTERNAL CUST# - Displays the current internal number listed for the customer.

NEW ALPHA CUST# - Enter the new alpha customer number that will replace the old alpha customer number.

ENTER 0 OR 'END' TO ACCEPT, 'ABORT' TO CANCEL

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Notes:

Account:22 BASE.12 Port:022 Menu:CUSTOMER.MAINT Capture:On

Customer / Ship-to Maintenance

1. Customer Master Maintenance

2. Customer Detail Maintenance

3. Ship-To Maintenance

4. Customer Notes Maintenance

5. Customer Product Order Notes Maintenance

Enter Selection or END :

CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off		Popup

Customer/ Ship-to Maintenance

This file is used to create and edit detailed information pertaining to the customer. This includes customer master maintenance, customer detail maintenance, ship-to maintenance, customer notes maintenance, and customer product order notes maintenance information.

Notes:

Customer Master Maintenance		Internal #	100197	Created	07/02/01
Customer#	KESSLER				
1.Name	KESSLER REHAB GROUP		22.Spec Prc Cont#		
2.Address 1	100 CENTRAL AVE		23.Shipto Code	R	
3.Address 2			24.Ship Method	01	UPS
4.Address 3			25.Ship Zone	01	NET 30
5.City	EAST ORANGE		26.Terms Code	N	
6.State	NJ	Country			
7.Zip Code	07002	8.Res/Comm	C		NJ NEW JERSEY
9.DEA Code					
10.A/R Contact				Y	# Days 90
11.Telephone	973-628-3150		29.Tax Exempt #	00	
12.Fax Number	973-621-2242		30.Service Chg		10000
13.EMail			31.Credit Method		
14.Master A/R			32.Credit Limit		
15.Cust Class	01	HOSPITALS	33.Credit Days		
16.Cust Type	02	DOCTORS,CLINICS	34.Credit Hold	N	
17.Cust Group			35.Accept B/O	Y	
18.Territory			36.Accept Partial	Y	
19.Spec Inst			37.Accept Subs	Y	
20.Purch Cont			38.Department		
21.Purch Phone			39.Prc Hld Exempt	N	
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :			40.ALC Priority		
			41.Inactive Flag		
					XXXXXX
					PAGE 1 OF 5

Customer Master Maintenance

Customer# - At the customer number prompt you can enter the customer number, enter the beginning customer number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Name - Enter the name of the customer.

Address 1 - Enter the first line of the address.

Address 2 - Enter the second line of the address.

Address 3 - Enter the third line of the address.

City - Enter the city for the address.

State - Enter the two digit state. This is a required field and is validated against a state code table. For non-US addresses, use state code 'FF'.

Country - Enter the 3 digit country code for this address. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the country.

Zip Code - Enter the zip code for this customer primary address. You may enter the 5 digit zip code or the 5 plus 4 digit zip code. Acceptable formats: NNNNN or NNNNN-NNNN

Notes:

Customer Master Maintenance		Internal #	100197	Created	07/02/01
Customer#	KESSLER				
1.Name	KESSLER REHAB GROUP		22.Spec Prc Cont#		
2.Address 1	100 CENTRAL AVE		23.Shipto Code	R	
3.Address 2			24.Ship Method	01	UPS
4.Address 3			25.Ship Zone		
5.City	EAST ORANGE		26.Terms Code	01	NET 30
6.State	NJ	Country		N	
7.Zip Code	07002	8.Res/Comm	C		NJ NEW JERSEY
9.DEA Code			29.Tax Exempt #	Y	# Days 90
10.A/R Contact			30.Service Chg		
11.Telephone	973-628-3150		31.Credit Method	00	
12.Fax Number	973-621-2242		32.Credit Limit		10000
13.Email			33.Credit Days		
14.Master A/R			34.Credit Hold	N	
15.Cust Class	01	HOSPITALS	35.Accept B/O	Y	
16.Cust Type	02	DOCTORS,CLINICS	36.Accept Partial	Y	
17.Cust Group			37.Accept Subs	Y	
18.Territory			38.Department		
19.Spec Inst			39.Prc Hld Exempt	N	
20.Purch Cont			40.ALC Priority		
21.Purch Phone			41.Inactive Flag		
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :			XXXXXX	PAGE 1 OF 5	

Customer Master Maintenance

Res/Comm – Enter 'R' if this is a residential address and a 'C' if this is a commercial address. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays the residential or commercial options for the user to select.

DEA Code - Enter this customer's DEA code. The DEA code is the second letter of the DEA number. (This is usually the FIRST letter of the LAST name of the DEA license holder. For example: The DEA Code for Dr. Mark Green would be "G".)

A/R Contact – Enter the accounts receivable contact name. The character limit is 20. This name, if entered, will be displayed on the accounts receivable credit manager inquiry.

Telephone - Enter the accounts receivable telephone number.

Fax Number - Enter the accounts receivable fax number.

Email - Enter primary email address for this customer. If you have Report Capture email functionality on your MDS system, the default customer email address will come from this field.

Master A/R – At the master accounts receivable prompt, you can enter the master accounts receivable account number. If accounts receivable transactions generated by this account are to be posted to a customer's central billing office, or to a parent company, the customer ID of the central office or parent is entered here. The customer ID entered must already exist on the Customer Master file. You can enter the account number (13 character limit), enter the beginning master accounts receivable number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Notes:

Customer Master Maintenance		Internal #	100197	Created	07/02/01
Customer#	KESSLER				
1.Name	KESSLER REHAB GROUP		22.Spec Prc Cont#		
2.Address 1	100 CENTRAL AVE		23.Shipto Code	R	
3.Address 2			24.Ship Method	01	UPS
4.Address 3			25.Ship Zone		
5.City	EAST ORANGE		26.Terms Code	01	NET 30
6.State	NJ	Country		N	
7.Zip Code	07002	8.Res/Comm	C		NJ NEW JERSEY
9.DEA Code					
10.A/R Contact			29.Tax Exempt #	Y	# Days 90
11.Telephone	973-628-3150		30.Service Chg		
12.Fax Number	973-621-2242		31.Credit Method	00	
13.EMail			32.Credit Limit		10000
14.Master A/R			33.Credit Days		
15.Cust Class	01	HOSPITALS	34.Credit Hold	N	
16.Cust Type	02	DOCTORS,CLINICS	35.Accept B/O	Y	
17.Cust Group			36.Accept Partial	Y	
18.Territory			37.Accept Subs	Y	
19.Spec Inst			38.Department		
20.Purch Cont			39.Prc Hld Exempt	N	
21.Purch Phone			40.ALC Priority		
			41.Inactive Flag		
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :			XXXXXX	PAGE 1 OF 5	

Customer Master Maintenance

Cust Class – Enter the 2 digit numeric customer class. The customer class code entered must already exist on the customer class file in Customer Class maintenance. You can click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select the appropriate customer class.

Cust Type – Enter the 2 digit numeric Customer Type. The customer type code entered must already exist on the Customer Type file in customer type maintenance. You can click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select the appropriate customer type.

Cust Group – Enter the 3 digit alpha-numeric group. The Customer Group code entered must already exist on the Customer Group file in customer group maintenance. You can click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select the appropriate customer group.

Territory - Enter the territory that this customer is in. The territory code is previously established in the territory maintenance program. You can click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select from the available territories.

Spec Inst – Enter special instructions for this customer. Enter '0' To Accept, 'C' To Change or 'Delete' to Delete.

Purch Cont - Enter the purchasing contact for this customer. This is the person doing the purchasing at the customer site.

Purch Phone – Enter the purchasing contact phone number.

Notes:

Customer Master Maintenance		Internal #	100197	Created	07/02/01
Customer#	KESSLER				
1.Name	KESSLER REHAB GROUP		22.Spec Prc Cont#		
2.Address 1	100 CENTRAL AVE		23.Shipto Code	R	
3.Address 2			24.Ship Method	01	UPS
4.Address 3			25.Ship Zone	01	NET 30
5.City	EAST ORANGE		26.Terms Code	N	
6.State	NJ	Country			
7.Zip Code	07002	8.Res/Comm	C		NJ NEW JERSEY
9.DEA Code					
10.A/R Contact			29.Tax Exempt #	Y	# Days 90
11.Telephone	973-628-3150		30.Service Chg	00	
12.Fax Number	973-621-2242		31.Credit Method		10000
13.EMail			32.Credit Limit		
14.Master A/R			33.Credit Days		
15.Cust Class	01	HOSPITALS	34.Credit Hold	N	
16.Cust Type	02	DOCTORS,CLINICS	35.Accept B/O	Y	
17.Cust Group			36.Accept Partial	Y	
18.Territory			37.Accept Subs	Y	
19.Spec Inst			38.Department		
20.Purch Cont			39.Prc Hld Exempt	N	
21.Purch Phone			40.ALC Priority		
			41.Inactive Flag		
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :			XXXXXX	PAGE 1 OF 5	

Customer Master Maintenance

Spec Prc Cont# - Enter the special price account number. Enter the customer number of the account you would like to match pricing with.

Shipto Code – Enter the default ship-to code for the account. This field is used by the order entry subsystem to determine the ship-to information. (It may, of course, be changed by the operator during order processing.) Valid values are:

- 'S' - will print the word "SAME" as the ship-to
- 'R' - repeat the sold to as the ship-to

Or use a specific 6 digit ship-to code created in Ship-To Maintenance. You can click on the 'INQUIRY' icon or press the 'F7' function key which opens a menu for the user to select the appropriate code.

Ship Method - Enter a valid ship method code previously set up in Ship Code Maintenance, for this account. Order Entry will automatically pick up this ship method and combined with ship zone and rate, calculate the correct shipping charges for the order. In addition, an override is available to change ship code on order entry from default entered here. You can click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select the appropriate ship method.

Ship Zone – Enter the ship zone (Range 0 to 999). Combined with the Ship.Method, it is the key to the Ship.Rate file. You can click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select the appropriate ship zone.

Terms Code – Enter the default terms code for this customer. This field is validated against the Terms file. You can click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select from the list of term codes.

Notes:

Notes:

Customer Master Maintenance		Internal #	100197	Created	07/02/01
Customer#	KESSLER				
1.Name	KESSLER REHAB GROUP		22.Spec Prc Cont#		
2.Address 1	100 CENTRAL AVE		23.Shipto Code	R	
3.Address 2			24.Ship Method	01	UPS
4.Address 3			25.Ship Zone		
5.City	EAST ORANGE		26.Terms Code	01	NET 30
6.State	NJ	Country		N	
7.Zip Code	07002	8.Res/Comm	C		NJ NEW JERSEY
9.DEA Code					
10.A/R Contact				Y	# Days 90
11.Telephone	973-628-3150		31.Credit Method	00	
12.Fax Number	973-621-2242		32.Credit Limit		10000
13.EMail			33.Credit Days		
14.Master A/R			34.Credit Hold	N	
15.Cust Class	01	HOSPITALS	35.Accept B/O	Y	
16.Cust Type	02	DOCTORS,CLINICS	36.Accept Partial	Y	
17.Cust Group			37.Accept Subs	Y	
18.Territory			38.Department		
19.Spec Inst			39.Prc Hld Exempt	N	
20.Purch Cont			40.ALC Priority		
21.Purch Phone			41.Inactive Flag		
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :			XXXXXX	PAGE 1 OF 5	

Customer Master Maintenance

Taxable - Enter 'Y' or 'N' for taxable/non-taxable items. If 'Y' is selected, you must enter a tax jurisdiction that applies for this customer.

Tax Juris - Enter a tax jurisdiction for this customer. This field is used to find the tax percentage from the TAX.RATE or TAX.MATRIX file. You can click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select from the list of term codes.

Tax Exempt# - Enter the tax exempt number if applicable.

Service Chg - Enter 'Y' or 'N' if this customer will have a service charge. This field controls the automatic calculation of service charges on overdue A/R items during the service charge calculation update.

#Days - Enter the amount of days the service charge will take affect after.

Credit Method - Enter a credit method code. This code indicates the method of credit check for this account. The first digit of the code may have either of the following meanings:

0 - Credit check against master A/R account. If digit 1 is 0 but there is not a master A/R then credit check is performed against this individual account (same as if 1 =1). If the first digit is 1 credit check is performed against the individual account.

Notes:

Customer Master Maintenance		Internal #	100197	Created	07/02/01
Customer#	KESSLER				
1.Name	KESSLER REHAB GROUP		22.Spec Prc Cont#		
2.Address 1	100 CENTRAL AVE		23.Shipto Code	R	
3.Address 2			24.Ship Method	01	UPS
4.Address 3			25.Ship Zone		
5.City	EAST ORANGE		26.Terms Code	01	NET 30
6.State	NJ	Country		N	
7.Zip Code	07002	8.Res/Comm	C		NJ NEW JERSEY
9.DEA Code					
10.A/R Contact			29.Tax Exempt #	Y	# Days 90
11.Telephone	973-628-3150		30.Service Chg		
12.Fax Number	973-621-2242		31.Credit Method	00	
13.EMail			32.Credit Limit		10000
14.Master A/R			33.Credit Days		
15.Cust Class	01	HOSPITALS	34.Credit Hold	N	
16.Cust Type	02	DOCTORS,CLINICS	35.Accept B/O	Y	
17.Cust Group			36.Accept Partial	Y	
18.Territory			37.Accept Subs	Y	
19.Spec Inst			38.Department		
20.Purch Cont			39.Prc Hld Exempt	N	
21.Purch Phone			40.ALC Priority		
			41.Inactive Flag		
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :			XXXXXX	PAGE 1 OF 5	

Customer Master Maintenance

The second digit of the code is defined as follows:
 0 - Unlimited credit. No credit check is performed
 1 - Check A/R balance against credit limit
 2 - Check the sum of A/R balance plus value of open orders against credit limit
 3 - Check the date of the oldest open invoice against the maximum allowable days (from Company Master)
 4- Numbers 1 and 3 are performed
 5- Numbers 2 and 3 are performed

Credit Limit - Enter the dollar value credit limit for the account.

Credit Days - Enter the number of days for credit checking if this customer has special credit days for credit checking.

Credit Hold - Enter 'Y' or 'N' if this customer can be placed on credit hold. A 'Y' in this field means no orders for this customer can be entered. If a flag is changed from 'N' to 'Y' for an existing account, any orders entered prior to the switch will not be affected by the change. However, any new orders entered after the change will be placed on credit hold.

Accept B/O - Enter 'Y' or 'N' if this customer accepts backorders. A 'N' in this field means that the order entry sub-system will cancel any quantities which would normally become backorders for this customer.

Accept Partial - Enter 'Y' or 'N' if this customer accepts partial shipment. A 'N' in this field means that the order entry will put the entire quantity for a line into either the "to be picked" category or the "backorder" category.

Notes:

Customer Master Maintenance		Internal #	100197	Created	07/02/01
Customer#	KESSLER				
1.Name	KESSLER REHAB GROUP		22.Spec Prc Cont#		
2.Address 1	100 CENTRAL AVE		23.Shipto Code	R	
3.Address 2			24.Ship Method	01	UPS
4.Address 3			25.Ship Zone		
5.City	EAST ORANGE		26.Terms Code	01	NET 30
6.State	NJ	Country		N	
7.Zip Code	07002	8.Res/Comm	C		NJ NEW JERSEY
9.DEA Code					
10.A/R Contact				Y	# Days 90
11.Telephone	973-628-3150		31.Credit Method	00	
12.Fax Number	973-621-2242		32.Credit Limit		10000
13.EMail			33.Credit Days		
14.Master A/R			34.Credit Hold	N	
15.Cust Class	01	HOSPITALS	35.Accept B/O	Y	
16.Cust Type	02	DOCTORS,CLINICS	36.Accept Partial	Y	
17.Cust Group			37.Accept Subs	Y	
18.Territory			38.Department		
19.Spec Inst			39.Prc Hld Exempt	N	
20.Purch Cont			40.ALC Priority		
21.Purch Phone			41.Inactive Flag		
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :			XXXXXX	PAGE 1 OF 5	

Customer Master Maintenance

Accept Subs - Enter 'Y' or 'N' if this customer accepts substitute products. A 'N' in this field will inhibit both automatic and manual review substitutions during order entry.

Department - Enter the customer's department number.

Prc Hld Exempt - Enter 'Y' or 'N' if this customer is price hold exempt. If price hold logic is used during order entry, this field will control whether a price hold determination will be done for this account. (See order entry documentation for an explanation of price hold logic.)

ALC Priority - Enter the allocation priority code for this customer. Allocation priority used in the allocation programs
Range 0 to 9 with 0 being the highest. This field controls the allocation of new receipts for all open backorders. Within a given priority level, backorders are filled on the basis of age, oldest first.

Inactive Flag - Enter a 'Y' if this customer is inactive, otherwise, enter 'N' for an active customer. Default is 'N'. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down box to search for the available options.

Dea# - Enter the DEA number. Optional DEA number used for doctors wishing to purchase drugs. Optional 2 alpha 7 numeric character field.

Dea Exp - Enter the expiration date for this customers Dea license number.

Drug Type - Enter the types of drugs that this customer is permitted to purchase. Note that this method of customer account access allows a 2 character A/N. Order Entry will validate against this file when a customer has an order to purchase drugs. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down box to search for the drug type.

Notes:

Customer	Master	Maintenance		Internal#	100197
Customer#	KESSLER				
42.Dea#			55.Freight Class		
43.Dea Exp Date			56.Charge Freight	Y	
44.Drug Type	1.		57.Frt Surcharge %		0.00
	2.		58.Frt Surcharge \$		0.00
45.License #			59.Frt Min Dol		0
46.Med Data Sht	N		60.EDI Cust#		
47.Monthly Bill	N		61.Recv 850.EDI	N	
48.Serv Co#	01		62.Send 855 EDI	N	
49.Serv Whse	001		63.Send 856 EDI	N	
50.Hospital ID#			64.Send 810 EDI	N	
51.Admin Fee %		0.00	65.Cust.PO #	Y	
52.Label Fee		0.00	66.Wild Card		
53.Facility			67.DUNS Number		
54.Credit Card Data			68.Dunning Flag	N	
Type	Card#		Exp	Verify#	
	Name :		Corp		
Type	Card#		Exp	Verify#	
	Name :		Corp		
Type	Card#		Exp	Verify#	
	Name :		Corp		
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :					XXXXXX
					PAGE 2 OF 5

Customer Master Maintenance

License # – Enter the hospital or doctor's license number to purchase drugs.

Med Data Sht - Enter 'Y' or 'N' if this customer should receive a medical data sheet which contains product information.

Monthly Bill - Enter a 'Y' or 'N' if this customer will be billed monthly. Entering a 'Y' in this field indicates that the customer is a monthly billing customer. All invoices for this customer will only be produced once a month normally at month end. If 'N' is entered the customer will be invoiced in the normal fashion.

Service Co# - Enter the company number for the company that serves this customer.

Serv Whse - Enter the warehouse number for the warehouse that services this customer.

Hospital ID# - Enter the identification number of the hospital.

Admin Fee % - Enter the admin fee percent to be charged on each invoice for this customer.

Label Fee - Enter the label fee to be charged to this customer.

Facility – Enter the facility.

Credit Card Data - Enter the credit card type such as AMEX, VISA, M/C, etc. The Type must be a valid value in the Credit Card Control file. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list of credit card options.

Type – Enter the credit type such as AMEX, VISA, M/C, etc. The type must be a valid value in the credit card control file.

Card # - Enter the credit card number to use for this customer.

Notes:

Customer	Master	Maintenance	Internal#	100197
Customer#	KESSLER			
42.Dea#			55.Freight Class	
43.Dea Exp Date			56.Charge Freight	Y
44.Drug Type	1.		57.Frt Surcharge %	0.00
	2.		58.Frt Surcharge \$	0.00
45.License #			59.Frt Min Dol	0
46.Med Data Sht	N		60.EDI Cust#	
47.Monthly Bill	N		61.Recv 850.EDI	N
48.Serv Co#	01		62.Send 855 EDI	N
49.Serv Whse	001		63.Send 856 EDI	N
50.Hospital ID#			64.Send 810 EDI	N
51.Admin Fee %		0.00	65.Cust.PO #	Y
52.Label Fee		0.00	66.Wild Card	
53.Facility			67.DUNS Number	
54.Credit Card Data			68.Dunning Flag	N
Type	Card#		Exp	Verify#
	Name :		Corp	
Type	Card#		Exp	Verify#
	Name :		Corp	
Type	Card#		Exp	Verify#
	Name :		Corp	
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :				XXXXXX
				PAGE 2 OF 5

Customer Master Maintenance

Exp – Enter the expiration date in MMY format as it appears on the credit card for the customer.

Verify# - Enter the credit card verification number for this customer's credit card number. This value is used to authenticate the credit card number when charges are placed for the credit card.

Name – Enter the name as it appears on the credit card.

Corp – Enter a 'Y' if this is a corporate or purchasing card. Default is 'N'.

Freight Class - Enter the freight class for this customer. This freight class will be fed to the freight class field at order entry time. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list of freight classes.

Charge Freight – Enter 'Y' or 'N' to charge this customer freight. The freight charge flag is used to flag those customers who you charge freight.

Frst Surcharge % - Enter the freight surcharge percent. The freight surcharge percent field allows the operator to enter an amount of the surcharge for freight. If a percentage amount is entered here it will be calculated with any other freight charge amount that has been manually entered at the time of Verification, One step, and Credit Memo entry.

Frst Surcharge \$ - Enter the freight surcharge dollar amount. Enter a dollar amount to be added as a freight surcharge for this customer's orders, otherwise leave blank.

Frst Min Dol - Enter the freight order minimum dollars to be used to calculate if freight should be charged. If this field is blank, the freight order minimum in the Company record will be used.

Notes:

Customer	Master	Maintenance		Internal#	100197
Customer#	KESSLER				
42.Dea#			55.Freight Class		
43.Dea Exp Date			56.Charge Freight	Y	
44.Drug Type	1.		57.Frt Surcharge %		0.00
	2.		58.Frt Surcharge \$		0.00
45.License #			59.Frt Min Dol		0
46.Med Data Sht	N		60.EDI Cust#		
47.Monthly Bill	N		61.Recv 850.EDI	N	
48.Serv Co#	01		62.Send 855 EDI	N	
49.Serv Whse	001		63.Send 856 EDI	N	
50.Hospital ID#			64.Send 810 EDI	N	
51.Admin Fee %		0.00	65.Cust.PO #	Y	
52.Label Fee		0.00	66.Wild Card		
53.Facility			67.DUNS Number		
54.Credit Card Data			68.Dunning Flag	N	
Type	Card#		Exp	Verify#	
	Name :		Corp		
Type	Card#		Exp	Verify#	
	Name :		Corp		
Type	Card#		Exp	Verify#	
	Name :		Corp		
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :					XXXXXX
					PAGE 2 OF 5

Customer Master Maintenance

EDI Cust # - Enter the EDI number for this customer. When transmitting purchase orders, or orders through EDI (Electronic Data Interchange) customers will be given a specific ID number to identify the orders when they're being transmitted. This number should be entered in this field.

Recv 850.EDI - Enter 'Y' or 'N' if you will be receiving EDI 850 (PO's) for this customer.

Send 855 EDI - Enter 'Y' or 'N' if the system should send EDI 855 (PO Acknowledgement) to this customer.

Send 856 EDI - Enter 'Y' or 'N' if the system should send EDI 856 (Advance Ship Notices) through EDI to this customer.

Send 810 EDI - Enter 'Y' or 'N' if the system should send an 810 (Invoice) through EDI to this customer.

Cust PO # - Enter 'Y' or 'N' if the customer purchase order field will be required during order entry. The customer purchase order appears on the order entry header page.

Wildcard - Enter a wildcard for this customer. This is a free form field which can be used for additional customer identification. When using customer lookup, the Wild Card data will be searched as name.

DUNS Number - Enter the customer's DUNS number for use with E-Procurement functions on the website.

Notes:

Customer	Master	Maintenance		Internal#	100197
Customer#	KESSLER				
Manifest/Routing	Info				
78.Call Day	3	WEDNESDAY			
79.Primary Route	NJ	Stop	10	NJ ROUTE	
80.Secondary Route		Stop			
Customer	Form	Flags			
81.Pack Slip Template					
82.Pick Slip Price	N	88.Combined Statement			
83.Pack Slip Copies		89.Sort Invoice			
84.Invoice at Packing		Fax Form	Fax Number		
85.Print Order Conf		90.Pickslip			
86.Invoice Copies	1	91.Packslip			
87.Intl Customer Flag		92.Invoice			
E-Mail Form	E-Mail Address				
93.Pickslip					
94.Packslip					
95.Invoices					
96.GPO					
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :					XXXXXX
					PAGE 3 OF 5

Customer Master Maintenance

Dunning Flag - Enter a 'N' in this field to indicate that dunning letters are not desired for this account. See Dunning System documentation for more details.

Call Day - Enter a call day number (1-7) which corresponds to the day of the week that this customer prefers to get their deliveries. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to select from the days of the week.

Primary Route - Enter the primary route for this customer to be used with the manifest system. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select from the available routes.

Stop - Enter the stop number for the primary route for this customer. Stop number may be up to 99999, and must be a number.

Secondary Route - Enter the secondary route for this customer to be used with the manifest system. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select from the available routes.

Stop - Enter the stop number for the secondary route for this customer. Stop number may be up to 99999, and must be a number.

Pack Slip Template - Enter the name of the special packing slip template to use for printing of the packing slip for this customer. Leaving this field blank will cause the pack slip program to print using the default pack slip form. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu to select from the available templates.

Notes:

Customer	Master	Maintenance		Internal#	100197
Customer#	KESSLER				
Manifest/Routing	Info				
78.Call Day	3	WEDNESDAY			
79.Primary Route	NJ	Stop	10	NJROUTE	
80.Secondary Route		Stop			
Customer	Form	Flags			
81.Pack Slip Template					
82.Pick Slip Price	N	88.Combined Statement			
83.Pack Slip Copies		89.Sort Invoice			
84.Invoice at Packing		Fax Form	Fax Number		
85.Print Order Conf		90.Pickslip			
86.Invoice Copies	1	91.Packslip			
87.Intl Customer Flag		92.Invoice			
EEmail Form	EEmail Address				
93.Pickslip					
94.Packslip					
95.Invoices					
96.GPO					

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX PAGE 3 OF 5

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	NOTES INQUIRY	CANCEL	Of			Userfile Popup
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Customer Master Maintenance

Pack Slip Price - Enter a 'Y' for printing unit prices on picking ticket or 'N' for not printing prices on picking ticket for this customer.

Pack Slip Copies - Enter the number of copies of the packing slip to be printed. Leaving this field blank will cause the pack slip program to print the number of copies that is in the operators current default.

Invoice at Packing - Enter a 'Y' in this field to have the invoice print at the packing station after verification.

Print Order Conf - Enter 'Y' if you want to print an order confirmation for this customer. Default is 'N'.

Invoice Copies - Enter the number of invoice copies to print. This field is used only in custom situations were multiple invoices are needed. Enter a range 0 to 9.

Intl Customer Flag - Enter a 'Y' to print the international product description on an invoice. Default is 'N'.

Combined Statement - Enter a 'Y' and the monthly statement print will print a backup invoice for each item on the statement along with the statement.

Sort Invoice - This is used to sort and subtotal the invoice by product class. There is an account 1 and an account 2 in the product class maintenance. Enter 1 to sort the invoice by the account 1 code, enter 2 to sort the invoice by the account 2 code for this customer. Enter N if the invoice should not sort by product class. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up menu for you to select from the available options.

Notes:

Customer	Master	Maintenance		Internal#	100197
Customer#	KESSLER				
Manifest/Routing	Info				
78.Call Day	3	WEDNESDAY			
79.Primary Route	NJ	Stop	10	NJROUTE	
80.Secondary Route		Stop			
Customer	Form	Flags			
81.Pack Slip Template					
82.Pick Slip Price	N	88.Combined Statement			
83.Pack Slip Copies		89.Sort Invoice			
84.Invoice at Packing		Fax Form	Fax Number		
85.Print Order Conf		90.Pickslip			
86.Invoice Copies	1	91.Packslip			
87.Intl Customer Flag		92.Invoice			
E-Mail Form	E-Mail Address				
93.Pickslip					
94.Packslip					
95.Invoices					
96.GPO					
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :					XXXXXX
					PAGE 3 OF 5

Customer Master Maintenance

Pickslip - Enter a 'Y' if a copy of the picking ticket should be faxed to this customer automatically.

Packslip - Enter a 'Y' if a copy of the packing slip should be faxed to this customer automatically.

Invoice - Enter a 'Y' if a copy of the invoice should be faxed to this customer automatically.

Pickslip - email - Enter a 'Y' if a copy of the picking ticket should be emailed to this customer automatically.

Packslip - email - Enter a 'Y' if a copy of the packing slip should be emailed to this customer automatically.

Invoice - email - Enter a 'Y' if a copy of the invoice should be emailed to this customer automatically.

GPO - Enter the GPO's (Group Purchasing Organizations) that this customer belongs to. This information is used when assigning and evaluating contracts and rebates. You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up menu for you to select from the available options.

Customer Serv Rep - Enter the Operator ID for the customer service representative.

Additional Contacts - Enter the contact name, email address, description, phone number, extension and fax number for this additional contact. The numbers will keep scrolling as you fill in additional contacts.

Percent Usage - Enter the Percentage of Average Monthly Usage to recommend at RemoteNet order entry. Whole number only. e.g."90" represents 90 percent.

Notes:

Customer Master Maintenance

Customer# Internal#

97. Customer Serv Rep

A/R Contact A/R Phone

A/R EMail

Purch Contact Purch Phone

98. Additional Contacts

	Contact Name	Description	Phone#	Ext	Fax#
1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT : PAGE 4 OF 5

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	NOTES INQUIRY	CANCEL	Off	Userfile Popup
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Notes:

Customer Master Maintenance

Display Pricing - Enter 'Y' if pricing is to be displayed during RemoteNet order entry.

Req Date Flag - Enter 'Y' if the required date field is a required field during RemoteNet order entry. Default is 'N'.

Dept No. Flag - Enter 'Y' if the department number field is a required field during RemoteNet order entry. Default is 'N'.

Customer PO Flag - Enter Y if the Customer PO number field is a required field during RemoteNet order entry.

Req # Flag - Enter Y if the Requisition Number field is a required field during RemoteNet order entry.

Ordered-By Flag - Enter 'Y' if the Ordered By field is a required field during RemoteNet order entry.

You can also click the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up menu for you to select from the available options.

Association Codes - Enter an association code value from 01 to 99. Use code 99 if you wish customers to view and order all products. This value is used in conjunction with the Product Association Code to restrict a customer from ordering products on the RemoteNet website.

Authenticate Flag - Enter a 'Y' if you wish all website users for this customer to be authenticated using a PIN code and website "cookie". Default is 'N'.

Customer	Master	Maintenance		Internal#	100197
Customer#	KESSLER				
Remote	Net	Info/Flags			
69.Percent Usage			<input type="checkbox"/>		
70.Display Pricing			<input type="checkbox"/>		
71.Reg Date Flag			<input type="checkbox"/>		
72.Dept No. Flag			<input type="checkbox"/>		
73.Customer PO Flag			<input type="checkbox"/>		
74.Reg # Flag			<input type="checkbox"/>		
75.Ordered-By Flag			<input type="checkbox"/>		
76.Association Codes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
77.Authenticate Flag			<input type="checkbox"/>		

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX PAGE 5 OF 5

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	NOTES INQUIRY	CANCEL	Off	Userfile Popup
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Customer Master Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

Do you want to go to the User Screen (Y):

If you have custom fields within this menu, you can enter a 'Y' to bring you into your personalized User Screen where more data may be entered for this record. The Userfile function is available when you enter a zero (0) to accept at the prompt, clicking on the 'Userfile' icon or by pressing the Shift+'F12' function key. This will forward the user to their special entry menu.

Notes:

CUSTOMER DETAIL MAINTENANCE

COMPANY 01 TSH MEDICAL SUPPLY

CUST # KESSLER KESSLER REHAB GROUP

1.SALESMAN 004 INHOUSE SALES

2.STATEMENT Y

3.CREDIT LIM 0 18.INVOICE COMPLETE N

4.PRICE POINT 19.DELETE FLAG

5.DISC POINT

6.COMM POINT

7.COMM % 0.00

8.TOTAL DISC 0.00

9.INCLUDE S1 Y

10.INCLUDE S3 Y

11.INCLUDE S4 Y

12.INCLUDE S5 Y

13.INCLUDE S6 Y

14.INCLUDE S7 Y

15.SALESMAN 2

16.TEMPLATE#

17.PRODUCT LINE/SALESMAN

1.

2.

3.

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT : XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Popup
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Customer Detail Maintenance

The Customer Detail file contains one record for each customer, for each company that the customer deals with. The file contains basic sales and credit history for the customer.

COMPANY– Enter the 2 digit company code, you can also click the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu for you to select from the available companies.

CUST # - Enter a customer number, or you can also initiate the look-up routine, click on the 'INQUIRY' icon, or press the 'F7' function key which opens the pop-up inquiry box to search for the product.

SALESMAN - Enter the primary salesman number. The primary salesman number is a required field and is validated against the Salesman file. Under normal circumstances, this is the salesman number used during order entry processing.

STATEMENT – Entering an 'N' in this field will prevent printing of A/R Statements for this account.

CREDIT LIM - Enter the dollar value credit limit for the account. The credit limit in this file (CUST.DET) may be used instead of credit limit in the CUST.MAST file, depending on the credit method chosen for this account. See the CUST.MAST documentation for a discussion of the various credit methods available.

PRICE POINT - Enter the price point amount (1-99). The three fields which follow, price point, discount point, and commission point, are all available for customized pricing logic. They can be used as point to various price, commission, and discount fields in the PROD.MAST file or any special files.

Notes:

CUSTOMER DETAIL MAINTENANCE

COMPANY 01 TSH MEDICAL SUPPLY

CUST # KESSLER KESSLER REHAB GROUP

1.SALESMAN 004 INHOUSE SALES

2.STATEMENT Y

3.CREDIT LIM 0 18.INVOICE COMPLETE N

4.PRICE POINT 19.DELETE FLAG

5.DISC POINT

6.COMM POINT

7.COMM % 0.00

8.TOTAL DISC 0.00

9.INCLUDE S1 Y

10.INCLUDE S3 Y

11.INCLUDE S4 Y

12.INCLUDE S5 Y

13.INCLUDE S6 Y

14.INCLUDE S7 Y

15.SALESMAN 2

16.TEMPLATE#

17.PRODUCT LINE/SALESMAN

1.

2.

3.

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Popup
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Customer Detail Maintenance

DISC POINT - Enter the discount point amount (1-15). This field points to discount in the product or Price Matrix file (1-15).

COMM POINT - Enter the commission point (1-15) for this customer. This field points to the commission % in the product or Price Matrix file.

COMM % - Enter the commission percent for this customer. (This field is used in conjunction with salesman).

TOTAL DISC - Enter the discount percent on the total invoice for this customer.

The six fields which follow control the update to the various sales history files for this account. Thus, they can be used to control the inclusion of this account in the different sales history reports which are generated from the files. All are (Y/N) fields. In each case, 'Y' means that the account will be included in the update and in the subsequent reports. The decision regarding how much sales history to keep for which accounts is a crucial one. It impacts not only the sales history reports, but also the overall system requirements in terms of storage space needed.

INCLUDE S1 - Enter 'Y' if you would like to include the account in the Sales.1 update and in the subsequent Sales.1 reports.

INCLUDE S3 - Enter 'Y' if you would like to include the account in the Sales.3 update and in the subsequent Sales.3 reports.

INCLUDE S4 - Enter 'Y' if you would like to include the account in the Sales.4 update and in the subsequent Sales.4 reports.

INCLUDE S5 - Enter 'Y' if you would like to include the account in the Sales.5 update and in the subsequent Sales.5 reports.

Notes:

CUSTOMER DETAIL MAINTENANCE

COMPANY	01	TSH MEDICAL SUPPLY		
CUST #	KESSLER		KESSLER REHAB GROUP	
1.SALESMAN	004	INHOUSE SALES		
2.STATEMENT	Y			
3.CREDIT LIM		0	18.INVOICE COMPLETE	N
4.PRICE POINT			19.DELETE FLAG	
5.DISC POINT				
6.COMM POINT				
7.COMM %		0.00		
8.TOTAL DISC		0.00		
9.INCLUDE S1	Y			
10.INCLUDE S3	Y			
11.INCLUDE S4	Y			
12.INCLUDE S5	Y			
13.INCLUDE S6	Y			
14.INCLUDE S7	Y			
15.SALESMAN 2				
16.TEMPLATE#				
17.PRODUCT LINE/SALESMAN				
1.				
2.				
3.				

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Customer Detail Maintenance

INCLUDE S6 – Enter 'Y' if you would like to include the account in the Sales.6 update and in the subsequent Sales.6 reports.

INCLUDE S7 – Enter 'Y' if you would like to include the account in the Sales.7 update and in the subsequent Sales.7 reports.

SALESMAN 2 – Enter the second salesman number for the account. The salesman will display in the A/R inquiry but is not used in the normal order entry processing. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu box and allows you to select from the available salesmen.

TEMPLATE# - Enter the template number. If this customer has a specific template created for them, then that template number can be attached to their Customer Master file in this field. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu box and allows you to select from the available templates.

PRODUCT LINE/SALESMAN – Enter a product line and associated salesman for this customer. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down menu box and allows you to select from the available product lines and salesmen.

INVOICE COMPLETE – Enter 'Y' or 'N' to indicate if this customer will be invoiced complete. If a 'Y' is selected the invoice program will not produce an invoice until the entire order (all releases) have been shipped. Default is 'N'.

DELETE FLAG - Enter 'Y' if this customer will be deleted during the next purge run. Default is 'N'.

CUSTOMER DETAIL MAINTENANCE

COMPANY 01 TSH MEDICAL SUPPLY
 CUST # KESSLER KESSLER REHAB GROUP
 1.SALESMAN 004 INHOUSE SALES
 2.STATEMENT Y
 3.CREDIT LIM 0 18.INVOICE COMPLETE N
 4.PRICE POINT 19.DELETE FLAG
 5.DISC POINT
 6.COMM POINT
 7.COMM % 0.00
 8.TOTAL DISC 0.00
 9.INCLUDE S1 Y
 10.INCLUDE S3 Y
 11.INCLUDE S4 Y
 12.INCLUDE S5 Y
 13.INCLUDE S6 Y
 14.INCLUDE S7 Y
 15.SALESMAN 2
 16.TEMPLATE#
 17.PRODUCT LINE/SALESMAN
 1.
 2.
 3.

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Popup
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Customer Detail Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Notes:

Ship To Maintenance

Customer #	KESSLER	KESSLER REHAB GROUP
Ship To #	R	
1.Ship To Name	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	19.Pick Priority
2.Ship To Addr1		20.DEA#
3.Ship To Addr2		21.DEA Expires
4.Ship To Addr3		22.License#
5.City		23.Drug Type
6.State	Country	1
7.Zip Code	8.DEA Code	2
9.Ship Method		3
10.Ship Zone		24.Phone#
11.Special Instr		25.Res/Com
12.Tax Juris.		29.Pack Slip Template
13.Tax Exempt #		
14.Service Whse		30.Facility
15.Admin Fee %	0.00	31.Inactive Flag
16.Primary Route	Stop	
17.Secondary Route	Stop	
18.Attention		

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Snagit	Popup
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Notes:

Ship To Maintenance

The customer Ship To file contains different ship to addresses for each customer. Each customer may have up to 999 ship to's on file.

Customer # – At the customer number prompt you can enter the customer number, enter the beginning customer number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Ship To # - Enter an existing ship to, or enter 'NEW' for a new ship to entry. You can select the "INQUIRY" icon or press the 'F7' function key to display existing ship to's or select 'R' for repeat ship to for this account.

Ship To Name – Enter a name for this ship to address.

Ship To Addr1 - Enter the ship to address.

Ship To Addr1 - Enter the second line of the ship to address.

Ship To Addr1 - Enter the third line of the ship to address.

City – Enter the city of the ship to address.

State – Enter the city of the ship to address.

Country – Enter the country code for this ship to address. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays a drop-down menu for you to select from the available country codes.

Zip Code –Enter the zip code of the ship to address

DEA Code - Enter the DEA Code for this ship to address.

Ship To Maintenance

Customer #	KESSLER	KESSLER REHAB GROUP
Ship To #	R	
1.Ship To Name	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	19.Pick Priority
2.Ship To Addr1		20.DEA#
3.Ship To Addr2		21.DEA Expires
4.Ship To Addr3		22.License#
5.City		23.Drug Type
6.State	Country	1
7.Zip Code	8.DEA Code	2
9.Ship Method		3
10.Ship Zone		24.Phone#
11.Special Instr		25.Res/Com
12.Tax Juris.		29.Pack Slip Template
13.Tax Exempt #		
14.Service Whse		30.Facility
15.Admin Fee %	0.00	31.Inactive Flag
16.Primary Route	Stop	
17.Secondary Route	Stop	
18.Attention		

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	SnagIt	Popup
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Notes:

Ship To Maintenance

Ship Method - Enter the shipping method most common for this ship to. The program will validate the entry against the Ship Method file. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays a drop-down menu for you to select from the available ship methods.

Ship Zone - Enter the shipping zone for the ship method selected. The program will validate this entry against the Ship Zone file.

Special Instr - Enter up to 25 characters of special instructions or miscellaneous customer data in this field.

Tax Juris. - Enter the Tax Jurisdiction Code for this ship to. The program will validate this entry against the Tax Jurisdiction file. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays a drop-down menu for you to select from the available tax jurisdiction codes.

Tax Exempt # - Enter the tax exemption number for this customer.

Service Whse - Enter the servicing warehouse for this customer. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays a drop-down menu for you to select from the available warehouses.

Admin Fee % - Enter the percent to be added to each invoice for this ship to for an administration charge.

Ship To Maintenance

Customer #	KESSLER	KESSLER REHAB GROUP
Ship To #	R	
1.Ship To Name	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	19.Pick Priority
2.Ship To Addr1		20.DEA#
3.Ship To Addr2		21.DEA Expires
4.Ship To Addr3		22.License#
5.City		23.Drug Type
6.State	Country	1
7.Zip Code	8.DEA Code	2
9.Ship Method		3
10.Ship Zone		24.Phone#
11.Special Instr		25.Res/Com
12.Tax Juris.		29.Pack Slip Template
13.Tax Exempt #		
14.Service Whse		30.Facility
15.Admin Fee %	0.00	31.Inactive Flag
16.Primary Route	Stop	
17.Secondary Route	Stop	
18.Attention		

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	SnagIt	Popup
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Notes:

Ship To Maintenance

Primary Route - Enter the primary route for this customer. This field is for use with the manifest system. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays a drop-down menu for you to select from the available routes.

Secondary Route - Enter the secondary route for this customer. This field is for use with the manifest system. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays a drop-down menu for you to select from the available routes.

Attention - Enter the name to whose attention the shipment should be delivered.

Pick Priority - Enter a numeric pick priority. This field is used as the default pick priority for a release when using the wireless picking system.

DEA# - Enter the DEA number used for customers or doctor's wishing to purchase drugs.

DEA Expires - Enter the expiration date for this DEA license number.

License# - Enter the hospital or doctor's license number.

Drug Type - Enter the types of drugs that this customer is permitted to purchase. Order Entry will validate against this file when a customer has an order to purchase drugs. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays a drop-down menu for you to select from the drug types listed.

Ship To Maintenance

Customer #	KESSLER	KESSLER REHAB GROUP
Ship To #	R	
1.Ship To Name	XXXXXXXXXXXXXXXXXXXXXXXXXXXX	19.Pick Priority
2.Ship To Addr1		20.DEA#
3.Ship To Addr2		21.DEA Expires
4.Ship To Addr3		22.License#
5.City		23.Drug Type
6.State	Country	1
7.Zip Code	8.DEA Code	2
9.Ship Method		3
10.Ship Zone		24.Phone#
11.Special Instr		25.Res/Com
12.Tax Juris.		29.Pack Slip Template
13.Tax Exempt #		
14.Service Whse		30.Facility
15.Admin Fee %	0.00	31.Inactive Flag
16.Primary Route	Stop	
17.Secondary Route	Stop	
18.Attention		

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	SnagIt	Popup
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Notes:

Ship To Maintenance

Phone# - Enter the phone number for this ship to.

Res/Com - Enter 'R' for residential or 'C' for commercial. This field is used for UPS shipping and is required.

Pack Slip Template - Enter the name of the special packing slip template to use for printing of the packing slip for this ship to. Leaving this field blank will cause the packing slip program to print using the default pack slip form. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays a drop-down menu for you to select from the available templates.

Facility - Enter the facility code for this ship to.

Inactive Flag - Enter a Y if this ship to is inactive, otherwise enter N for active.

Product Line/Salesman - Enter product line and the associated salesman. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays a drop-down menu for you to select from the salesman listed.

Salesman 1 - Enter first salesman for this ship to.

Salesman 2 - Enter second salesman for this ship to.

Customer # KESSLER KESSLER REHAB GROUP
 Ship To # R

26.PRODUCT LINE/SALESMAN

1.	----		
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			

27.SALESMAN 1
 28.SALESMAN 2

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Ship To Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

Customer # KESSLER KESSLER REHAB GROUP

Ship To # R

26.PRODUCT LINE/SALESMAN

1.	-----		
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			

27.SALESMAN 1

28.SALESMAN 2

PAGE 2 OF 2

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Customer Notes Maintenance

The customer notes maintenance allows you to enter notes for a particular customer. Order Entry operators will have the ability to view on screen any customer notes that are specific to this customer. You can also select to allow this to be viewed on all systems, in order entry, or in accounts receivable.

Customer# - At the customer number prompt you can enter the customer number, enter the beginning customer number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Note - Enter any note(s). Order Entry operators will have the ability to view on screen any Customer Notes that are specific to this customer.

Date - Enter the start date for the customer note. You can hit <ENTER> to fill with the current (system) date.

Output - Enter appropriate output code for where customer notes should be displayed. Allowable entries A, O, and AR. A for All Systems, O for Order Entry, or AR for Accounts Receivable. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up display box select a specific output.

Expires - Enter the date for which to cease displaying and/or printing this customer note. Hit <ENTER> for no expiration date.

Co - Enter what company this note applies to. Enter ALL for All Companies. Default is ALL.

Customer		Notes	Maintenance	Valid	Output	Codes
Customer#	KESSLER					
	KESSLER REHAB GROUP					
				A - All	Systems	
				0 - Order	Entry	
				AR - Accounts	Receivable	

1.Line	Note	Date	Output	Expires	Co	Print
1.	REVIEW ALL ORDER WITH CREDIT	10/10/06	A		ALL	N
2.						
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
13.						

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Customer Notes Maintenance

Print - Enter the code for where these notes are to print. P for Pick Ticket, I for Invoice, or B for Both Pick Ticket and Invoice.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

Notes:

Customer Product Order Notes Maintenance

Customer	KESSLER
	KESSLER REHAB GROUP
Product	02-AL
	ANKLE STIRRUP AIRCAST LFT

Print on

Line	Note	Pick Ticket	Invoice
1.	-----		
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Customer Product Order Notes Maintenance

The customer product order notes maintenance allows you to enter notes for a particular customer and product. Order Entry operators will have the ability to view on screen any customer notes that are specific to this customer. You can also allow the note(s) to be viewed on the pick ticket or invoice.

Customer - At the customer prompt you can enter the customer number, enter the beginning customer number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Product - At the product number prompt you can enter the product number, enter the beginning product number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the product.

Note - Enter any note(s). Order entry operators will have the ability to view on screen any customer product order notes that are specific to this customer and product.

Pick Ticket - Enter 'Y' to print Customer Product Order Notes on the pick ticket or 'N' to not print Customer Order Notes on the pick ticket.

Invoice - Enter 'Y' to print Customer Product Order Notes on the invoice or 'N' to not print Customer Order Notes on the invoice.

Customer Product Order Notes Maintenance

Customer	KESSLER
	KESSLER REHAB GROUP
Product	02-AL
	ANKLE STIRRUP AIRCAST LFT

Print on

Line	Note	Pick Ticket	Invoice
1.	VERIFY MINIMUM SELL QUANTITY OF 12	Y	N
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			
13.			

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Customer Product Order Notes Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

Adobe Acrobat

File Edit Document Tools View Window Help

PAGE 1 ***** CUSTOMER MASTER FILE LISTING ***** DATE 10:08:51am 16 Oct 2006

CUST.MAST.	A.CUST.NO....	NAME AND ADDRESS.....	TAXABLE TAX JURIS	A/R CONT.....	PHONE.NO.....	TC	CH	CRLIM..
100636	BNDA	BAHAMAS NATIONAL DRUG AGENCY P.O. BOX 85431 NASSAU FF	N			01	05	0
100635	FS	FOOD SERVICES P.O. BOX 21314 NASSAU FF	N			01	05	0
100497	GUTMH	GUTTENBURG MUN HOSPITAL 2ND & MAIN GUTTENBURG IA 52052	N	IAG		01	05	10,000
100197	KESSLER	KESSLER REHAB GROUP 100 CENTRAL AVE EAST ORANGE NJ 07002	N	NJ	973-628-3150	01	00	10,000
100631	LMHS	LEE MEMORIAL HOSP FT MYERS FL 30912	N			01	05	0
100476	MARCOW	MICHAEL MARCOWITZ MD 4360 KENNEDY BLVD	Y	IAG	718-555-1212	01	04	5,000

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Customer Master Listing

This listing prints the customer master number, alpha customer number, name and address, taxable indicator, tax jurisdiction code, A/R contact name, phone number, tax class, credit method and credit limit.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:

Adobe Acrobat

File Edit Document Tools View Window Help

PAGE 1 *****CUSTOMER DETAIL FILE***** DATE 10:20:19am 16 Oct 2006

CUST#.....	CUST.NO	CO#	CUSTOMER NAME.....	SLSM	STMNT	PRICE	DISC%	DISC	COMM%	COMM	CREATE.DT	SALES \$. YTD...
UMC	100139	01	UNIVERSITY MEDICAL CENTE	001	Y		0.00		0.00		05/29/01	154,384
MERCYKFP	100156	01	MERCY KALONA FAM PRACTIC	004	Y		0.00		0.00		06/01/01	3,259
MERCYCSA	100172	01	MERCY CARE 2ND AVENUE	003	Y		0.00		0.00		06/07/01	4,572
MERCYCJA	100178	01	MERCY CARE JOHNSON AVENU	003	Y		0.00		0.00		07/18/01	24,017
MERCYWL	100181	01	MERCY SERVICE WEST LIBER	004	Y		0.00		0.00		06/18/01	8,544
MERCYCVV	100184	01	MERCY CARE VERNON VILLAG	003	Y		0.00		0.00		06/19/01	17,483
MERCYCMAR	100190	01	MERCY CARE MARION	003	Y		0.00		0.00		06/20/01	32,030
KESSLER	100197	01	KESSLER REHAB GROUP	004	Y		0.00		0.00		07/02/01	55,842
MERCYCIND	100205	01	MEDICAL ASSOCIATES OF	003	Y		0.00		0.00		07/06/01	37,310
MERCYCB	100240	01	MERCY CARE BLAIRSFERRY	003	Y		0.00		0.00		07/20/01	20,596
MERCYMCC	100293	01	MERCY MEDICAL CENTER	004	Y		0.00		0.00		08/08/01	1,408
STANFORD	100307	01	STANFORD UNIVERSITY	001	Y		0.00		0.00		08/13/01	0
MERCYIC	100330	01	MERCY HOSPITAL	002	Y		0.00		0.00		08/30/01	804
MERCYSIC	100335	01	MERCY SERVICES IOWA CITY	002	Y		0.00		0.00		08/31/01	0
MERCYFC	100353	01	MERCY FITNESS CENTER	003	Y		0.00		0.00		09/14/01	1,458

190% 1 of 2 11 x 8.5 in

Customer Detail Listing

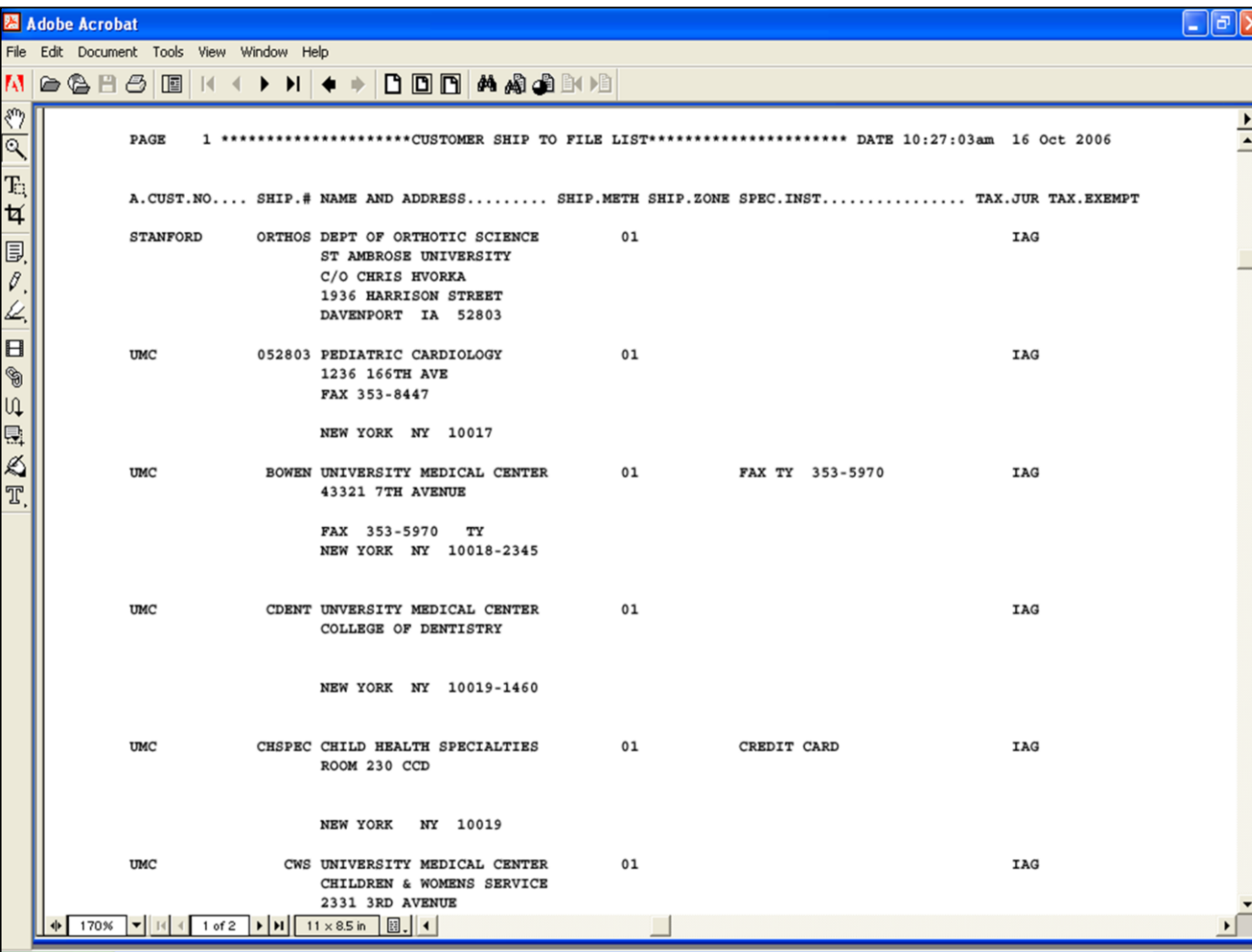
This listing prints the customer number, internal customer number, customer name, salesman number, statement indicator, price point, discount percentage, discount point, commission percentage, commission point, creation date and sales year-to-date total.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Customer Ship To Listing

This listing prints the alpha customer number, ship number, name and address, ship method, ship zone, special instructions, tax jurisdiction, and tax exempt status.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:

Country	Code	Maintenance
Country Code	000	
1.Description	U.S.A.	
2.Freight System Desc		

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Country Code Maintenance

The country code maintenance allows you to create or edit country codes to be used when entering addresses.

Country Code - Enter a three digit country code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down dialog box for you to select from all available country codes.

Description – Enter the description for the country code.

Freight System Desc – Enter the freight system description for this country code. Use this description to pass country codes to the UPS Worldship system. They must match the Freight system codes exactly to be accepted.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Notes:

State		Code		Maintenance							
State	Code	NJ									
1.Description	NEW JERSEY										
2.Time Zone	1	Eastern Time									
3.Foreign	N										
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :											
XXXXXX											
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup

State Code Maintenance

The state code maintenance allows you to create or edit state codes that will be used with the tele-marketing system.

State Code - Enter a two digit state code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down dialog box for you to select from all available state codes.

Description – Enter the description of the state code.

Time Zone – Enter the time zone for the state code. Allowable entries are 1, 2, 3, and 4. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up dialog box for you to select from all available time zones.

1 – Eastern Time, 2 – Central Time, 3 - Mountain Time, 4 – Pacific Time

Foreign – Enter 'Y' if this state code is a foreign state. Default is 'N'.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Notes:

SALESMAN MAINTENANCE										
Salesman #		<input type="text" value="***"/>								
1.Warehouse					17.Laptop					
2.Territory					18.Goal					
3.Name					19.Comm Type					
4.Address 1					20.P/C		Description		Comm%	
5.Address 2										
6.Address 3										
7.City										
8.State										
9.Zip Code										
10.Phone Number										
11.Email Address										
12.Commission %										
13.Sales Quota										
14.Commissionable										
15.Vendor										
16.PLine										
	GL#									

Salesman Maintenance

The salesman maintenance file contains descriptive information about each salesman and stores basic performance information on each individual. Reports are available throughout the system that will utilize the information stored in this file.

Salesman# - Enter a salesman number. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down dialog box for you to select from all available salesman numbers.

Warehouse - Enter the salesman's warehouse assignment. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down dialog box for you to select from all available warehouse's.

Territory - Enter the salesman's two digit territory. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down dialog box for you to select from all available territories.

Name - Enter the name of the salesman.

Address 1 - Enter the first line of the salesman's address.

Address 2 - Enter the second line of the salesman's address.

Address 3 - Enter the third line of the salesman's address.

City - Enter the city of the salesman's address.

State - Enter the two digit alpha state of the salesman's address.

Notes:

SALESMAN MAINTENANCE

Salesman #

1.Warehouse 17.Laptop

2.Territory

3.Name 18.Goal

4.Address 1 19.Comm Type

5.Address 2

6.Address 3

7.City 20.P/C Description Comm%

8.State 1.

9.Zip Code 2.

10.Phone Number 3.

11.Email Address 4.

12.Commission % 5.

13.Sales Quota

14.Commissionable

15.Vendor

16.PLine

GL#

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Salesman Maintenance

Zip Code – Enter the zip code of the salesman’s address.

Phone Number – Enter the salesman’s phone number.

Email Address – Enter the salesman’s email address.

Commission% - Enter the salesman commission percent. Maximum is 4 numeric digits.

Sales Quota – Enter the sales quota for this salesman.

Commissionable – Enter ‘Y’ if this salesman is commissionable, otherwise enter ‘N’.

Vendor – Enter the salesman vendor number. You can also click on the ‘INQUIRY’ icon or press the ‘F7’ function key which opens the drop-down dialog box for you to select from the list of available vendor’s.

PLine – Enter this salesman’s product line for commission. You can also click on the ‘INQUIRY’ icon or press the ‘F7’ function key which opens the drop-down dialog box for you to select from the list of available product lines. (You can also associate a GL# with the product line for this salesman.

Laptop – Enter ‘Y’ to download this salesman’s data nightly for use in the salesman laptop system.

Notes:

SALESMAN MAINTENANCE

Salesman #

1.Warehouse 17.Laptop

2.Territory 18.Goal

3.Name 19.Comm Type

4.Address 1 TEST COMM TYPE 01

5.Address 2

6.Address 3

7.City 20.P/C Description Comm%

8.State 1.

9.Zip Code 2.

10.Phone Number 3.

11.Email Address 4.

12.Commission % 5.

13.Sales Quota

14.Commissionable

15.Vendor

16.PLine

GL#

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off				Popup
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Salesman Maintenance

Goal – Enter the goal amount for this salesman. The goal amount will be used to determine the amount of commission the salesman will receive. This field is numeric and a whole dollar amount. The default is \$0.

Comm Type – Enter the commission type. The commission type field will be used to determine the table used when calculating the salesman’s commission. This field will be validated against the ‘Commission Type’ file. You can also click on the ‘INQUIRY’ icon or press the ‘F7’ function key which opens the drop-down dialog box for you to select from the list of available commission types.

P/C – Enter the two digit product class and commission percent. You can also click on the ‘INQUIRY’ icon or press the ‘F7’ function key which opens the drop-down dialog box for you to select from the list of product classes.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the ‘OK/END’ icon, press the ‘F2’ function key, or type in the word ‘END’ and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter ‘ABORT’, press ‘F8’ function key or click on the ‘CANCEL’ icon to cancel out.

Enter ‘DELETE’ followed by *** to delete an existing record.

Notes:

CUSTOMER TYPE MAINTENANCE

CUSTOMER TYPE

- 1.DESC
- 2.SALES G/L#
- 3.COST OF GOODS G/L#
- 4.SALES RTN GL#

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Customer Type Maintenance

Customer type codes in customer type maintenance (similar to class codes) can be used to further define your customer base. The codes are user defined and will allow reports to be created and sorted by this code. Customer type codes, once created, are included in the Customer Master file. Example: Use customer type to break out different groups of customers such as retail, wholesale, distributor, etc. In addition, if the General Ledger update by customer type is selected (see Parameter File), this file is used to store the appropriate sales , cost of goods and sales return General Ledger for each customer type.

CUSTOMER TYPE – Enter the two digit numeric customer type code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list box for you to select from the available customer Maintenance codes.

DESC – Enter the customer type code description.

SALES G/L# - Enter the sales general ledger number for this customer code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the available general ledger number.

COST OF GOODS G/L# - Enter the cost of goods general ledger number for this customer code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the available general ledger number.

SALES RTN GL# - Enter the sales returns general ledger number for this customer code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the available general ledger number.

CUSTOMER TYPE MAINTENANCE

CUSTOMER TYPE

1.DESC

2.SALES G/L#

3.COST OF GOODS G/L#

4.SALES RTN GL#

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Customer Type Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Notes:

SERVICE CHARGE MAINTENANCE

STATE

2.DEFAULT # OF SERVICE CHARGE DAYS

	SERV CHG%	DOLLARS
1.	1.50	500.00
2.	1.00	9999.00
3.	0.00	0.00
4.	1.00	12221.00

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Service Charge Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

Notes:

TAX RATE MAINTENANCE

TAX JURISDICTION

- 1. TAX %
- 2. JUR. DESC
- 3. TAX G/L #
- 4. CHARGE TAX ON FRT
- 5. STATE %
- 6. COUNTY %
- 7. CITY %

HELP

OK/END

INSERT

LDELETE

PREV PG

NEXT PG

INQUIRY

CANCEL

Off

Popup

Notes:

Tax Rate Maintenance

The tax rate maintenance contains the tax rate to be charged to taxable customers in each tax jurisdiction.

TAX JURISDICTION – Enter a tax jurisdiction code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available tax jurisdiction codes.

TAX % - Enter the tax percent for this tax jurisdiction.

JUR. DESC - Enter the tax jurisdiction description.

TAX G/L # - Enter the tax general ledger number for this jurisdiction. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the appropriate general ledger number.

CHARGE TAX ON FRT - Enter Y or N to charge tax on freight. All customers who are taxable with this tax jurisdiction will also be charged tax on the freight for all invoices. (Used in the Order Processing System) Default is N.

STATE % - Enter the percentage of the tax from line one that is to be the state tax percent. The total of the state, county and city taxes must equal the tax on line one.

COUNTY % - Enter the percentage of the tax that is the county percent. The total of the state, county and city taxes must equal the tax on line one.

CITY % - Enter the portion of the tax that is the city tax percent. The total of the state, county and city taxes must equal the tax on line one.

TAX RATE MAINTENANCE

TAX JURISDICTION	00319
1.TAX %	
2.JUR. DESC	
3.TAX G/L #	
4.CHARGE TAX ON FRT	
5.STATE %	0.000
6.COUNTY %	0.000
7.CITY %	0.000

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT : XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Tax Rate Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

TERMS MAINTENANCE

TERMS CODE 01

1.DESC NET 30

2.DISC % 0.00

3.TYPE

4.TERM DAYS 30

5.DUE DAYS 0

6.CUTOFF DATE

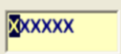
7.DUE DATE

8.CC PROMPT N

9.VALID OVERRIDES

1	23	CREDIT CARD
2	30	COD
3		
4		
5		
6		
7		

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :



HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL Off Popup

Notes:

Terms Maintenance

The terms maintenance defines the various terms offered to customers. Cash discount and invoice due date information is stored in this file.

TERMS CODE - Enter a terms code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available term codes.

DESC – Enter the description for the terms code.

DISC % - Enter the discount percent for this terms code.

TYPE – Enter a term type.
 <cr> = regular - Return
 P = prox terms (see #7 Due Date)
 Prox term dating also known as end of month dating.

TERM DAYS - Enter the term days for cash discount.

DUE DAYS – Enter the due days - days to as of date. (Maximum 210 days). This field represents the number of additional days this customer is to receive on invoice dating and relates to the aging parameters stored in the Company Master file. For example, if normal terms are net 30, and this customer receives the same terms, then "Due Days" should be loaded with a zero. If, however, the customer receives an additional 30 days (making his effective terms net 60), then "Due Days" should be 30.

CUTOFF DATE – Enter a cutoff date. Cutoff date is used with terms type 'P' only.

TERMS MAINTENANCE

TERMS CODE 01

1.DESC NET 30

2.DISC % 0.00

3.TYPE

4.TERM DAYS 30

5.DUE DAYS 0

6.CUTOFF DATE

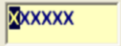
7.DUE DATE

8.CC PROMPT N

9.VALID OVERRIDES

1	23	CREDIT CARD
2	30	COD
3		
4		
5		
6		
7		

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :



HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Terms Maintenance

DUE DATE – Enter a prox due date. If the invoice date is less than or equal to the cutoff date, then the invoice will be due on the following month, on the due date. If greater than the cutoff, then the invoice will be due the following month on the due date.

For Example : Cutoff date = 25 / Due Date = 10
 If the invoice is dated Jan 1-25, it is due Feb 10.
 If the invoice is dated Jan 25-31, it is due March 10.

CC PROMPT - Enter Y if the system should prompt for credit card info when this terms code is used in order entry. Default is N.

VALID OVERRIDES - Enter the valid override codes which the operator will be allowed to choose from within order entry. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available list of term codes.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

TERRITORY MAINTENANCE

TERRITORY CODE

1.DESC

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Territory Maintenance

The territory maintenance contains the territory descriptions that are used in the Salesman file.

TERRITORY CODE – Enter a two digit numeric territory code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available territory codes.

DESC – Enter the territory code description.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

Notes:

Account:3548 DEMO.12 Port:548 Menu:SHIP.MAINT Capture:On											
Shipping Related Files											
Maintain						Listing					
1. Ship Method						6. Ship Method					
2. Ship Rate						7. Ship Rate					
3. Ship Zone						8. Ship Zone					
4. Truck Route						9. Truck Route					
5. Freight Class						10. Freight Class					
Enter Selection or END :											
OE	CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup

Shipping Menu

The shipping menu contains shipping related files that define the various shipping methods, shipping rates, and freight classes that may be used by the customer.

Notes:

Shipping	Method	Maintenance
Shipping Method	03	
1.Description	FEDEX	
2.Account Number	0450-6078	
3.BOL Flag		
4.Shipper No.		
5.Ship Wait	N	
6.Website URL		
7.Worldship Desc		
8.Saturday Del	N	
9.Scale On		
10.Carton Counting		

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Shipping Method Maintenance

Shipping Method - Enter a two digit numeric shipping method. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available shipping codes.

Description – Enter the shipping method description. i.e, 01 = UPS, 02 = UPS BLUE, RP = RPS

Account Number - Enter your account number with the shipping provider, to be used for this ship method.

BOL Flag – Enter a Y if a bill of lading is required for this shipping method.

Shipper No – Enter a shipper number for this shipping method.

Ship Wait - Enter Y if this ship method should cause the auto ship process to check the picking frequency table. Enter N if no check is to be made by the auto ship process. Default is N.

Website URL - Enter the website URL for this shipper. This is used by the MDS shipping system to display information on tracking packages.

Worldship Desc - Enter the description for this ship method that should be passed to the automated shipping system. This description must match the one used by Worldship in order for it to be accepted.

Saturday Del - Enter Y if this shipping method should pass the Saturday delivery flag to the Worldship system.

Shipping	Method	Maintenance
Shipping Method	03	
1.Description	FEDEX	
2.Account Number	0450-6078	
3.BOL Flag		
4.Shipper No.		
5.Ship Wait	N	
6.Website URL		
7.Worldship Desc		
8.Saturday Del	N	
9.Scale On		
10.Carton Counting		

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Shipping Menu

Scale On - Enter Y if scaling is required for this ship method. This is only valid if the shipping system is on (Parameter 128). If Y is not entered then releases will not be flagged for the freight system. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available options.

Carton Counting - Enter N to turn off carton counting for this ship method. This only applies if carton counting is already turned on for the warehouse by setting the default Inv Qty to C for carton counting.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record

Notes:

SHIP RATE FILE MAINTENANCE

SHIP METHOD 03 FEDEX
 SHIP ZONE 164

1. CALCULATION TYPE N
 2. STRAIGHT RATE/LB 0.00

3. LN# WEIGHT RATE

LN#	WEIGHT	RATE
1.	0.0	0.00
2.	0.0	0.00
3.	0.0	0.00
4.	0.0	0.00
5.	0.0	0.00
6.	0.0	0.00
7.	0.0	0.00
8.	0.0	0.00
9.	0.0	0.00
10.	0.0	0.00

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Shipping Rate File Maintenance

The shipping rate maintenance is used as the basis of automatic freight calculations in the system. This file is used in conjunction with the ship.method and ship.zone files.

SHIP METHOD – Enter the two digit ship method code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available ship methods.

SHIP ZONE – Enter the three digit numeric ship zone. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available ship methods.

CALCULATION TYPE - Enter a calculation type alpha code. This field controls the type of calculation to be done for this ship method and zone. Valid values are (N,S,R,Q, Y or D):

- N - No calculation is performed for this ship method and zone.
- S - Step Rate Calculation
- R - Single Rate Calculation.
- Q - Rate Lookup By Weight.
- Y - Straight weight per pound calculation, using the straight rate field.
- D - Dollar Amount Lookup By Weight

STRAIGHT RATE/LB – Enter the straight shipping rate per pound.

SHIP RATE FILE MAINTENANCE

SHIP METHOD 03 FEDEX

SHIP ZONE 164

1. CALCULATION TYPE N

2. STRAIGHT RATE/LB 0.00

3. LN# WEIGHT RATE

LN#	WEIGHT	RATE
1.	0.0	0.00
2.	0.0	0.00
3.	0.0	0.00
4.	0.0	0.00
5.	0.0	0.00
6.	0.0	0.00
7.	0.0	0.00
8.	0.0	0.00
9.	0.0	0.00
10.	0.0	0.00

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Shipping Rate File Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

SHIPPING ZONE MAINTENANCE

SHIPPING ZONE
 1.DESC

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Shipping Zone Maintenance

The ship zone file is used to further break down zones within a ship method. For example: you may have multiple zones with ship method UPS or RPS. Ship zone is required when entering the Ship Method file.

SHIPPING ZONE – Enter a three digit numeric shipping zone. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available options.

DESC – Enter the shipping zone description.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Delivery ROUTE Maintenance

Delivery Route
1.Description

NJ
NJ ROUTE

2.Comments

Empty text area for comments.

ENTER LINE # TO CHANGE, ADD TO ADD STOPS, DELETE TO DELETE,0 TO ACCEPT :



HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Of			Popup
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Notes:

Empty lines for notes.

Truck Route Maintenance

The deliver route maintenance is used to define specific delivery routes and instructions pertaining to this route.

Delivery Route – Enter a numeric delivery route with up to a five character maximum. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available delivery routes.

Description - Enter a description for this delivery route.

Comments - Enter any comments you may have regarding this delivery route.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Freight Class Maintenance

Freight Class Code:

1. Description:

	Dollars	Charge Freight	Percent	Local Whse Only
2.Tier 1	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>
3.Tier 2	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>
4.Tier 3	<input type="text" value="0.00"/>	<input type="text"/>	<input type="text" value="0.00"/>	<input type="text"/>

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

HELP OK/END INSERT LDELETE PREV PG NEXT PG INQUIRY CANCEL Off

Freight Class Maintenance

The freight class maintenance allows you to create and manage freight class codes.

Freight Class Code – Enter a freight class code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available freight class codes.

Description – Enter the description for this freight class.

Tier 1, 2 and 3:

Dollars – Enter the dollar amount for this tier.

Charge Freight - Enter Y or N if you want to charge freight at this tier level.

Percent – Enter the percentage of freight to charge.

Local Whse Only - If this flag is set to a Y, this tier will only apply to their local warehouse.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

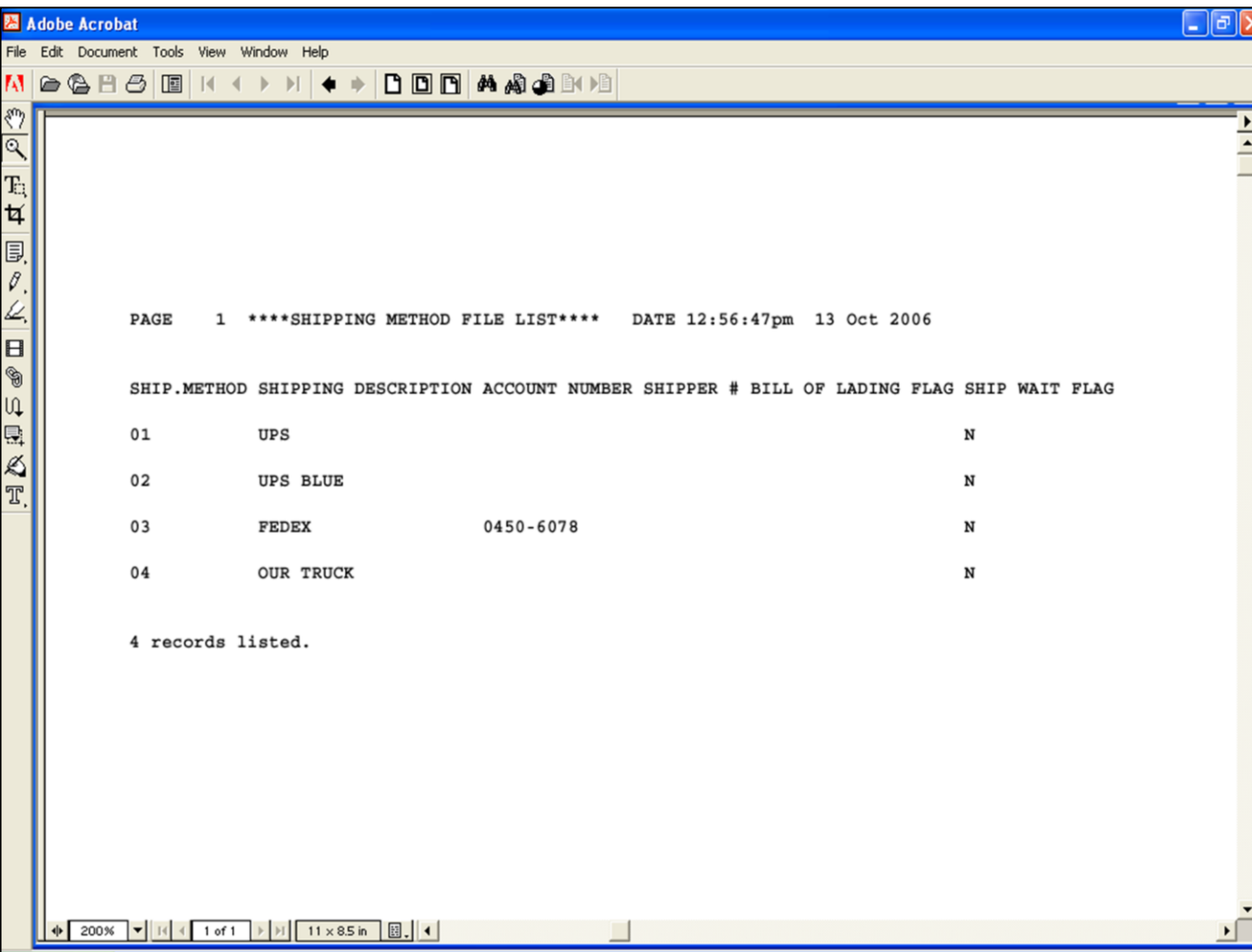
Notes:

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing

record

Notes:



Ship Method Listing

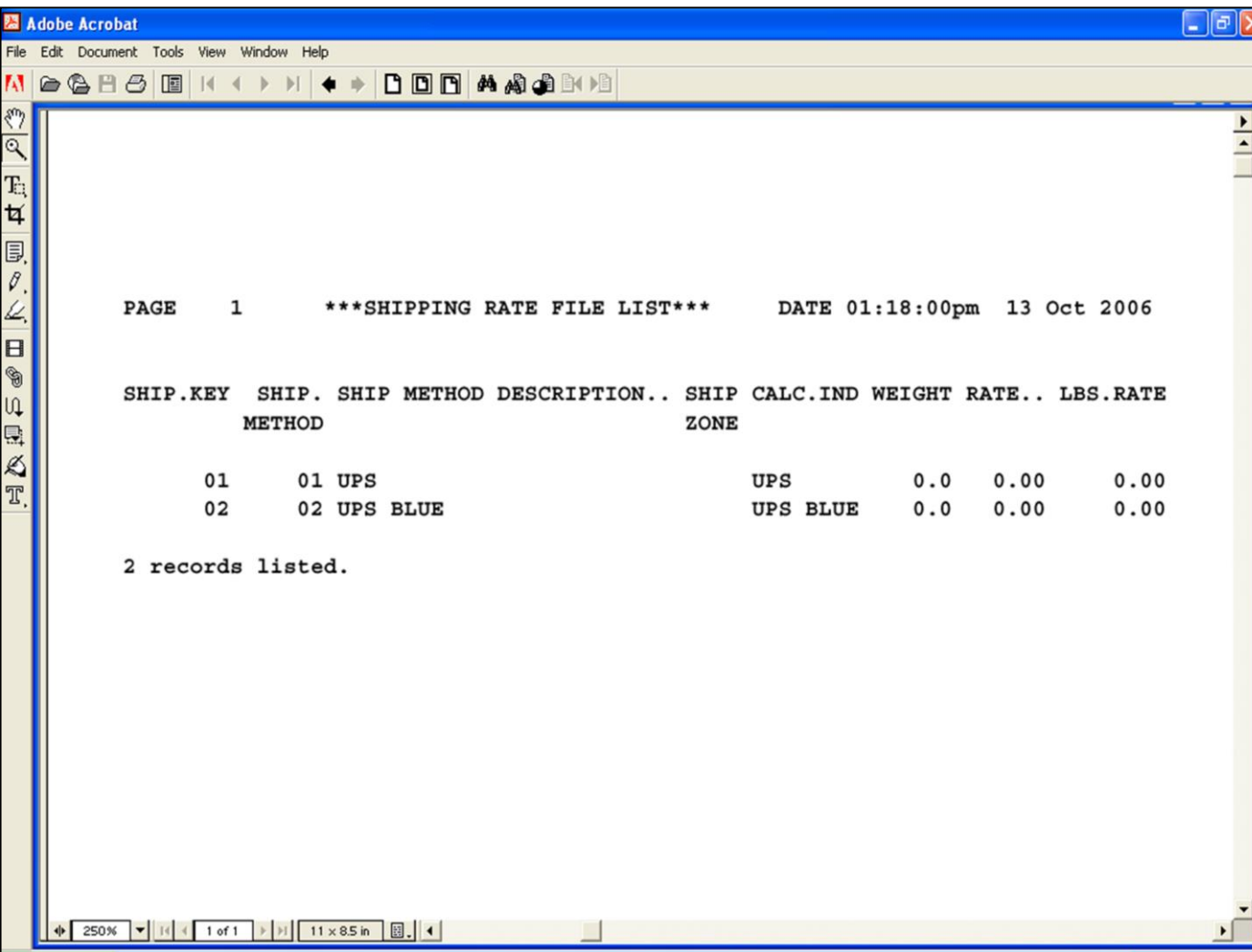
This listing prints the ship method code, shipping description, account number, shipper number, bill of lading flag, and ship wait flag.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Shipping Rate Listing

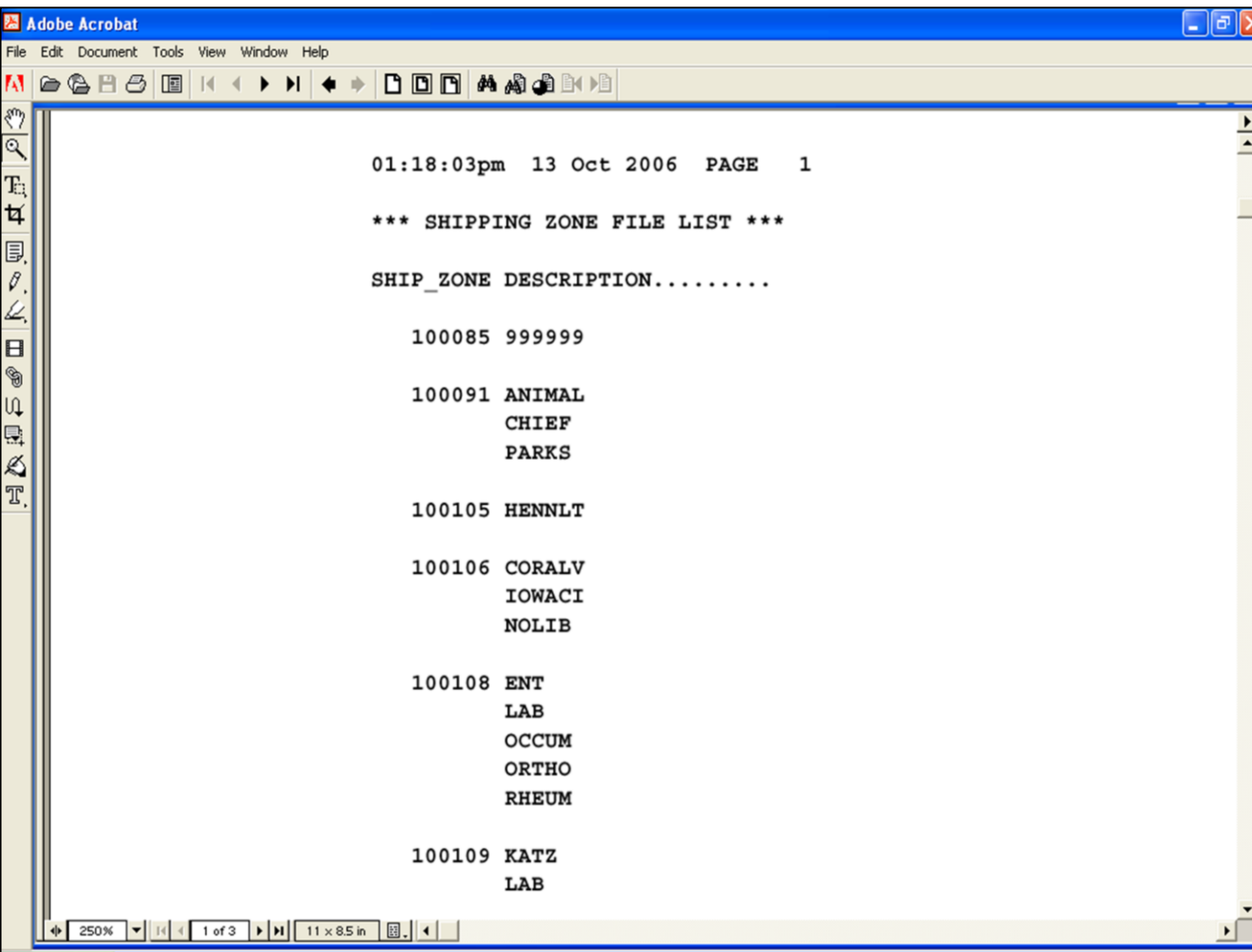
This listing prints the ship method key, ship method, ship method description, ship zone, calculation indicator, weight, rate, and lbs rate from the shipping rate file.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Shipping Zone Listing

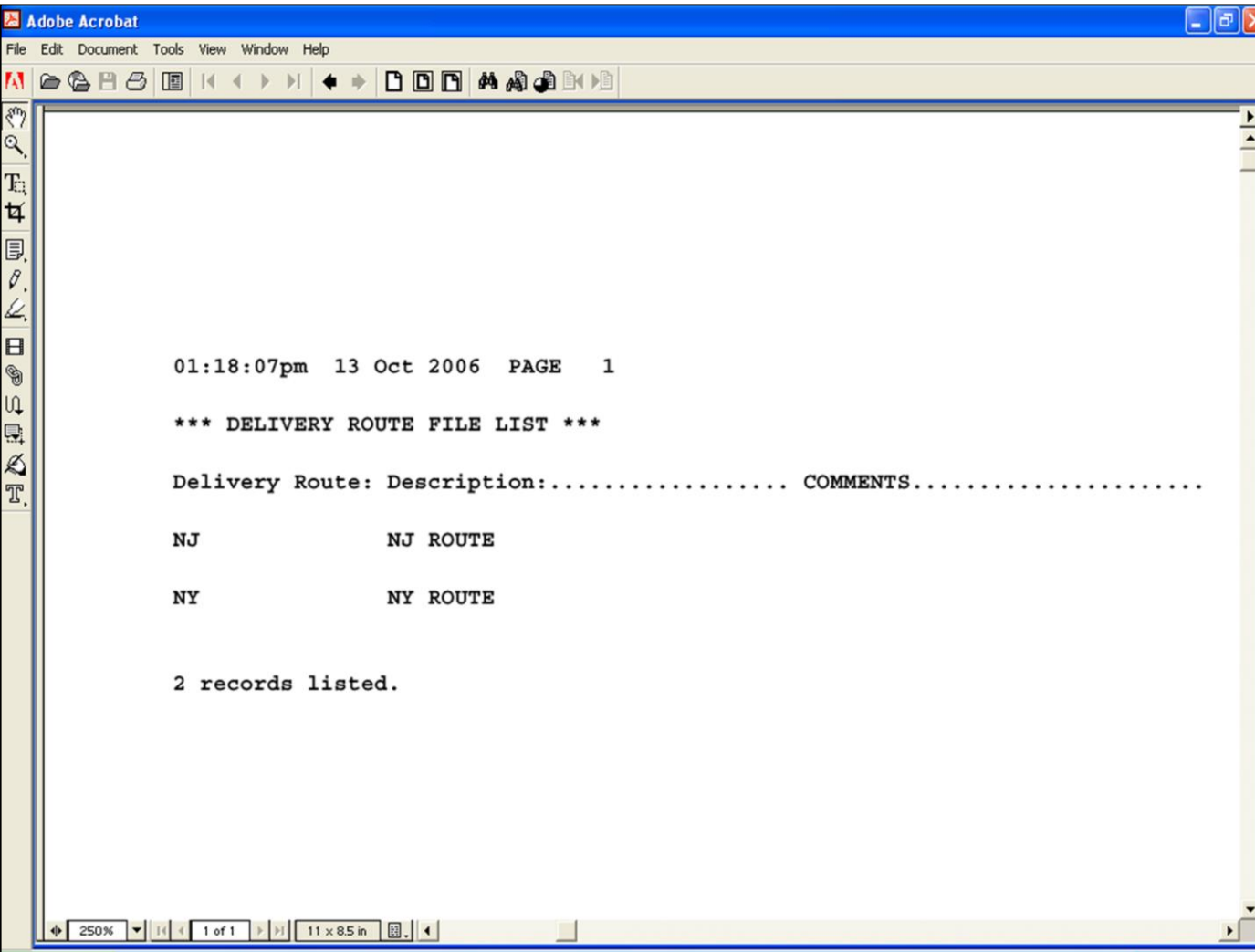
This listing prints the shipping zone code and shipping zone description.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Truck Route Listing

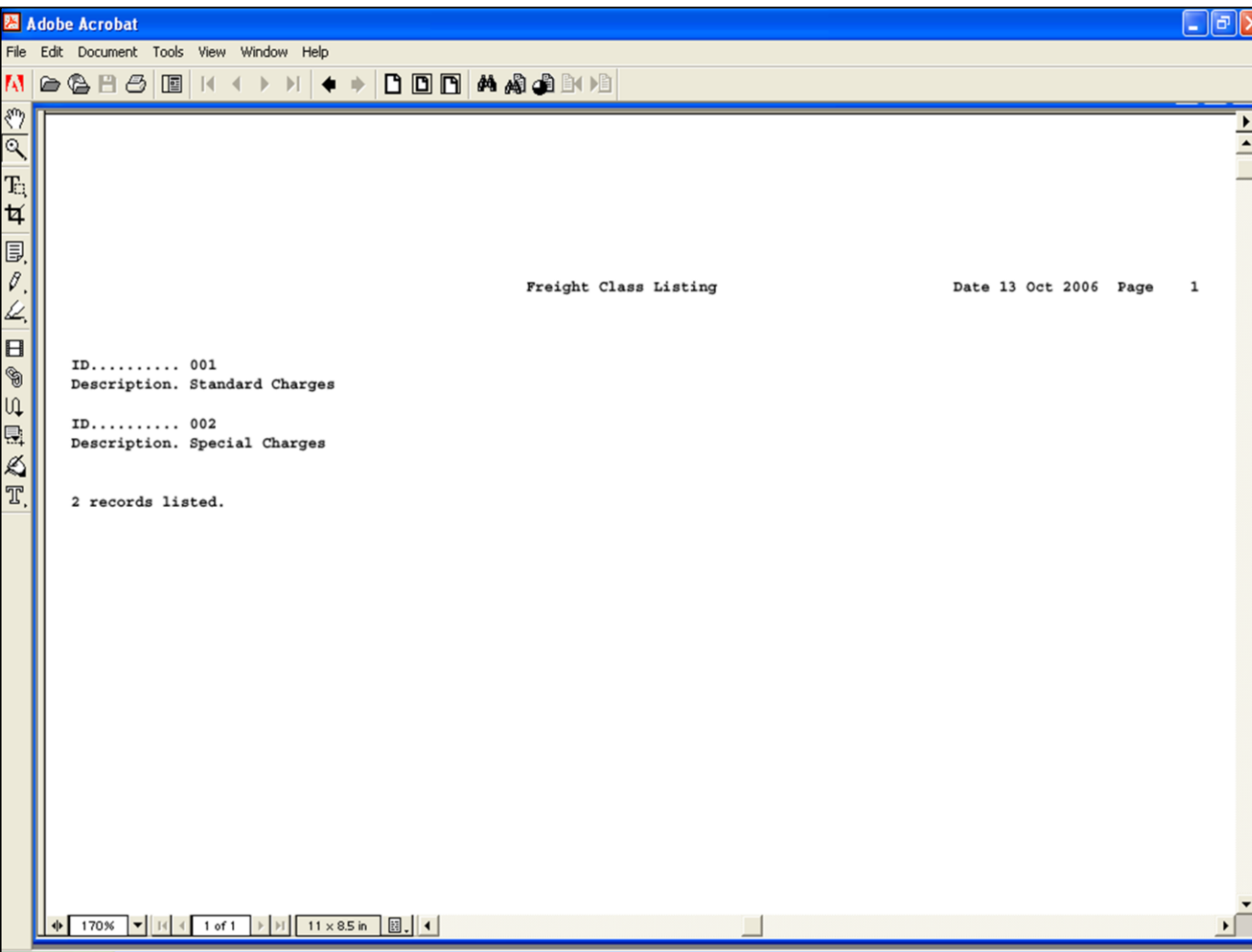
This listing prints the delivery route code, description and comments.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Freight Class Listing

This listing prints the freight class ID number, description and standard charges.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:

LABEL MAINTENANCE

LABEL #	0111720
1.SLD TO NA	KAREN THOMAS
2.SLD TO A1	CRANE CHEVROLET
3.SLD TO A2	1039 ROUTE 46 EAST
4.SLD TO A3	
5.CITY	CLIFTON
6.STATE	NJ
7.ZIP	07013
8.A/R CONT	KAREN THOMAS
9.PHONE #	973-888-1010
10.TYPE	AR
11.SOURCE	
12.CUST	Y
13.SLSM INSIDE	003 LISA FERTIG
14.SLSM OUTSIDE	001 SYFERTIG

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Mailing System Maintenance

The Label file is a stand alone file, similar in format to the Customer Master file. It is used when a mailing list separate from the customer master file is to be maintained. Mainly use for possible prospects or for promotions the company might be doing a mass mailing for.

LABEL# - Enter a label number. You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays all label numbers currently available. Maximum 7 characters.

SLD TO NA – Enter the sold to name

SLD TO A1 – Enter the first line of the sold to address.

SLD TO A2 – Enter the second line of the sold to address.

SLD TO A3 – Enter the third line of the sold to address.

CITY – Enter the city of this address.

STATE – Enter the state of this address.

ZIP – Enter the zip code of this address.

A/R CONT– Enter the accounts receivable contact name.

PHONE # – Enter the phone number.

LABEL MAINTENANCE

LABEL #	0111720
1.SLD TO NA	KAREN THOMAS
2.SLD TO A1	CRANE CHEVROLET
3.SLD TO A2	1039 ROUTE 46 EAST
4.SLD TO A3	
5.CITY	CLIFTON
6.STATE	NJ
7.ZIP	07013
8.A/R CONT	KAREN THOMAS
9.PHONE #	973-888-1010
10.TYPE	AR
11.SOURCE	
12.CUST	Y
13.SLSM INSIDE	003 LISA FERTIG
14.SLSM OUTSIDE	001 SYFERTIG

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Mailing System Maintenance

TYPE - Enter a valid customer type.

SOURCE – Enter source of lead or entry.

CUST – Enter Y if this is a customer, otherwise enter N.

SLSM INSIDE – Enter the three digit numeric inside salesman number. (This must be a valid salesman number) You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays all salesman numbers currently available.

SLSM OUTSIDE – Enter the three digit numeric outside salesman number. (This must be a valid salesman number) You can also click on the 'INQUIRY' icon or press the 'F7' function key which displays all salesman numbers currently available.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

PROSPECT MASTER MAINTENANCE

Ex Prospect#	MARCOW	Internal#	100476	Created	12/13/01
1.Name	MICHAEL MARCOWITZ MD				
2.Address1	4360 KENNEDY BLVD				
3.Address2					
4.Address3					
5.City	BROOKLYN	NY	10023		
6.Slsm	002	DAVID FERTIG			
7.Business	02	DOCTORS,CLINICS			
8.Comments					
9.Phone#	718-555-1212	Ext			
10.Fax#	718-555-1213				
11.E-Mail	MM@MARKOWITZ.COM				
12.WebUrl	12874				
13.SIC Code	0100	PHYSICIAN OFFICE			
14.Contact1	MICHAEL MARCOWITZ				
Title1	N				
15.Contact2					
Title2	N				
16.Status Cd	CUS	CUSTOMER			
17.Follow Up	05/21/03	14:00			

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT : XXXXXXXX PAGE 1 OF 2

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			UserFile
											Popup

Prospect Master Maintenance
 With the tele-marketing call detail screen, the operator will have the ability to maintain the customer/prospect information on-line. This will allow the operator to validate and update the customers/prospects information while on the phone with them. Notes in general will be added when appropriate by the salesman.

Ex Prospect # - Enter the external prospect number. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the prospect.

Name - Enter the name of the prospect.

Address 1 - Enter the first line of the prospect address.

Address 2 - Enter the second line of the prospect address.

Address 3 - Enter the third line of the prospect address.

City - Enter the city for the address. Enter the two digit state. This is a required field and is validated against a state code table. For non-US addresses, use state code 'FF'. Enter the zip code for this prospect's address. You may enter the 5 digit zip code or the 5 plus 4 digit zip code. Acceptable formats: NNNNN or NNNNN-NNNN

Slsm - Enter a prospect salesman number. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available salesmen.

Business - Enter customer class code for the prospect. Customer class code must exist on Customer Class file.

Notes:

PROSPECT MASTER MAINTENANCE

Ex Prospect#	MARCOW	Internal#	100476	Created	12/13/01
1.Name	MICHAEL MARCOWITZ MD				
2.Address1	4360 KENNEDY BLVD				
3.Address2					
4.Address3					
5.City	BROOKLYN	NY	10023		
6.Slsn	002	DAVID FERTIG			
7.Business	02	DOCTORS,CLINICS			
8.Comments					
9.Phone#	718-555-1212	Ext			
10.Fax#	718-555-1213				
11.E-Mail	MM@MARKOWITZ.COM				
12.WebUrl	12874				
13.SIC Code	0100	PHYSICIAN OFFICE			
14.Contact1	MICHAEL MARCOWITZ				
Title1	N				
15.Contact2					
Title2	N				
16.Status Cd	CUS	CUSTOMER			
17.Follow Up	05/21/03	14:00			

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT : XXXXXX PAGE 1 OF 2

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			UserFile
											Popup

Prospect Master Maintenance

Comments - Enter comments for this prospect.

Phone # - Enter the prospect telephone number.

Fax # - Enter the prospect fax number.

E-mail - Enter the prospect email address.

WebUrl - Enter the prospect Web URL.

SIC Code - Enter a prospect SIC Code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available SIC codes.

Contact 1 - Enter prospect contact one.

Title1 - Enter the title of prospect contact one.

Contact 2 - Enter prospect contact two.

Title2 - Enter the title of prospect contact two.

Status Cd - Enter a prospect status code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available status codes.

Follow Up - Enter prospect follow-up status date.

Notes:

PROSPECT MASTER MAINTENANCE										
Ex Prospect#	MARCOW 100476									
18.Lead Source	Y									
19.Current System										
20.Number of Users										
21.Sales Dollars	0.00									
22.Number of Employees	1									
23.Close Date										
24.Probability of Close										
25.Proposal Date										
26.Competition										
27.Next Step	N									
ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :										
	XXXXXX PAGE 2 OF 2									
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	UserFile	Popup

Prospect Master Maintenance

Lead Source - Enter the lead source for this prospect.

Current System - Enter the prospects current system type.

Number of Users - Enter the prospects current system number of users.

Sales Dollars - Enter the dollars this prospect does in sales per year.

Number of Employees - Enter the prospects number of employees.

Close Date - Enter the close date for this prospect.

Probability of Close - Enter the probability percentage that this prospect is going to close.

Proposal Date - Enter the proposal date for this prospect.

Competition - Enter information regarding the competition for this prospect.

Next Step - Enter information regarding the next step for this prospect.

Notes:

PROSPECT MASTER MAINTENANCE

Ex Prospect#

MARCOW

100476

18. Lead Source Y

19. Current System

20. Number of Users

21. Sales Dollars 0.00

22. Number of Employees 1

23. Close Date

24. Probability of Close

25. Proposal Date

26. Competition

27. Next Step N

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

PAGE 2 OF 2

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			UserFile
											Popup

Notes:

Prospect Master Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Account:3548 DEMO.12 Port:548 Menu:ORD.TEMPLATE.MENU Capture:On

Order Template Menu

Maintain

File List

1. Template Creation from (SALES.4)

2. Order Template

3. Order Template

Enter Selection or END :

OE	CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU		
HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup

Order Template Menu

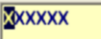
The order template maintenance allows you to create, update and manage your order templates for your customers.

Notes:

Order Template Creation from (SALES.4)

1. Company	01	TSH MEDICAL SUPPLY
2. Cust Class	01	HOSPITALS
3. Number of items (Maximum of 150)		150
4. Descending Year to Date (1) Sales\$ (2) Quantity		1
5. (1) This Year (2) Last Year		1
6. Template#		0101

Press <RETURN> to Process Report, Line# to Change, or ABORT :



HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Notes:

Template Creation from (SALES.4)

Company – Enter the two digit company number. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available company codes.

Cust Class – Enter the two digit customer class. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available customer classes.

Number of items (Maximum of 150) – Enter the number of items/products to be included on this template.

Descending Year to Date (1) Sales\$ (2) Quantity - Enter one (1) for sales dollars or the number two (2) for quantity descending year to date based on the number of items/products being selected for this template.

(1) This Year (2) Last Year - Select either this year's data by entering (1) or last year's data by entering (2) based on either sales\$ or quantity.

Template # - Enter the template number to be created. If the template number already exists on file, you will be asked if you want to override the record. Entry of the template number is without the company number.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the

'CANCEL' icon to delete this entry.

Notes:

COMPANY/ORDER TEMPLATE MAINTENANCE

CO# 01 TEMPLATE# GLOVES

1. DESC GLOVES TO BUY 2. CUST# _____

3. PRODUCT#	PRODUCT DESCRIPTION	M/C	TEMP QTY	U/M
1.484001	GLOVES SENSICARE SM 100.B		2	BX
2.484002	GLOVES SENSICARE MD 100.B		2	BX
3.484003	GLOVES SENSICARE LG 100.B		2	BX
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				

Line# to Change, 'ADD' Lines, '0' to Accept, 'ABORT' or 'DELETE':

XXXXXX

Prt Spcls	HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Order Template Maintenance

CO# - Enter the two digit company number. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list that displays all available company codes.

TEMPLATE# - Enter the template number. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list that displays all available template numbers.

DESC - Enter the template description.

CUST# - Enter the customer number. If entered, it can be used to price ALL the products on the template, , enter the beginning customer number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

PRODUCT# - Enter the product number for this line of the customers order template, enter the beginning product number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the product.

PRODUCT DESCRIPTION - Displays the product description.

M/C - This field will display and 'M' if this is a master kit item or 'C' if this is a kit component.

TEMP QTY - Enter quantity to be ordered for this template

U/M - Enter the unit of measure for this item. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list that displays all available unit of measures.

Notes:

COMPANY/ORDER TEMPLATE MAINTENANCE

CO# 01 TEMPLATE# GLOVES

1. DESC GLOVES TO BUY 2.CUST#

3. PRODUCT#	PRODUCT DESCRIPTION	M/C	TEMP QTY	U/M
1.484001	GLOVES SENSICARE SM 100.B			2 BX
2.484002	GLOVES SENSICARE MD 100.B			2 BX
3.484003	GLOVES SENSICARE LG 100.B			2 BX
4.				
5.				
6.				
7.				
8.				
9.				
10.				
11.				
12.				
13.				
14.				
15.				

XXXXXX

Line# to Change, 'ADD' Lines, '0' to Accept, 'ABORT' or 'DELETE':

Prt Spcls	HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Popup
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Order Template Maintenance

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

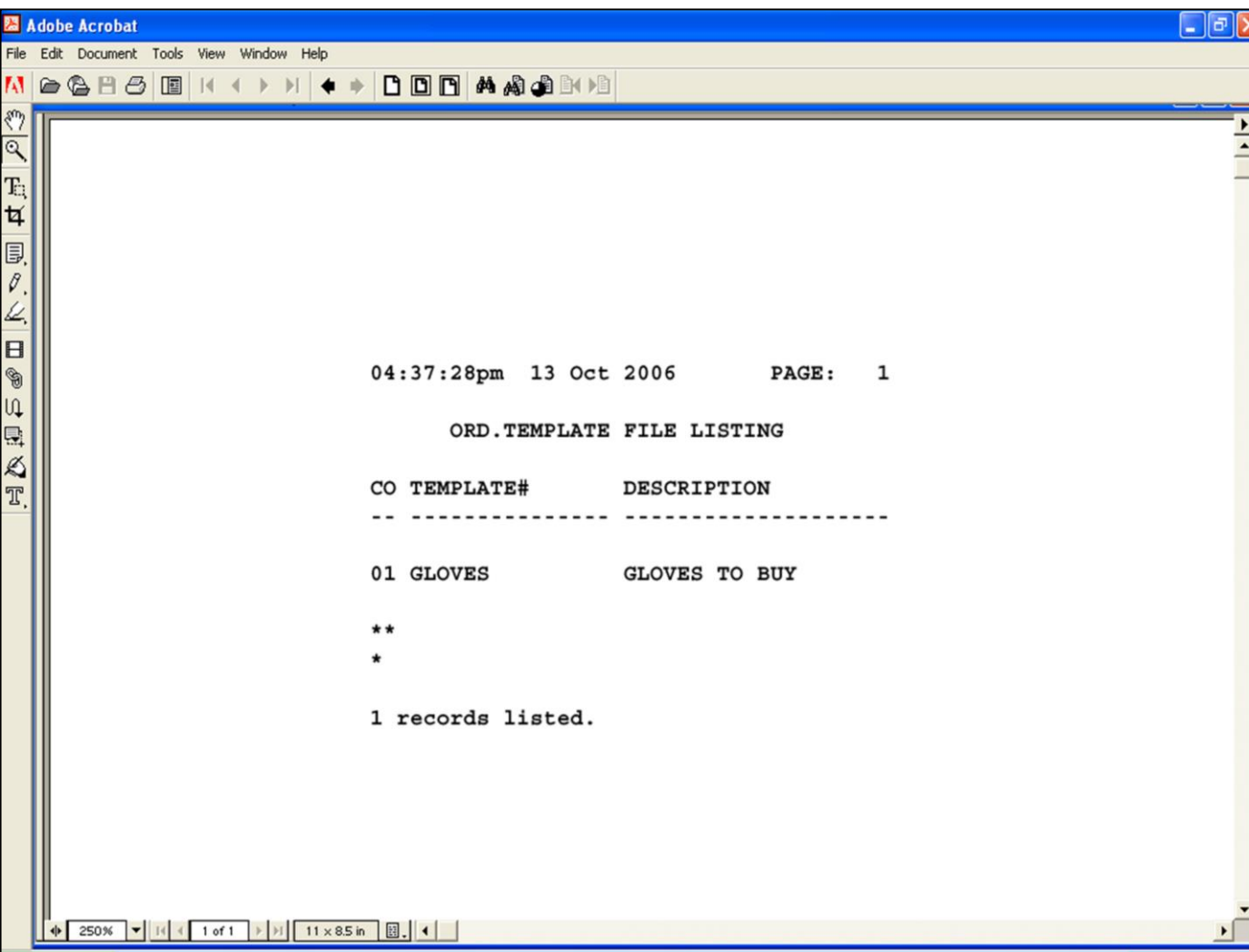
Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Notes:



Order Template File Listing

This listing prints by company number, template number and template description.

Company Options:

At this prompt the operator has the option of selecting 'All Companies', 'Company Range' or 'Specific Company'.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:

COMMISSION TYPE MAINTENANCE

Commission Type

1.Description

2.Table

	GP%	Comm%
1.	25.00	5.00
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

- HELP
- OK/END
- INSERT
- LDELETE
- PREV PG
- NEXT PG
- INQUIRY
- CANCEL
- Off
-
-
- Popup

Notes:

Commission Type Maintenance

Commission type codes are used to store information for calculating salesman commissions. The Commission Type file contains gross profit ranges and associated commission percentages for each range. An individual salesman record is set up to contain the appropriate commission type for that salesman.

Commission Type – Enter a two digit commission type code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list of available commission type codes.

Description – Enter a description for the commission type.

Table – Enter a gross profit percent and commission percent for this commission type.

GP % - Enter a maximum gross profit percent. Maximum Gross Profit percent for this level must be greater than previous gross profit percent.

Comm % - Enter the commission percent for this commission type. This field contains the commission percent to be used if the gross profit falls between the corresponding percentages.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Facility File Maintenance	
Facility Code	12400
1.Facility Name	
2.Facility Addr1	
3.Facility Addr2	
4.Facility Addr3	
5.City	
6.State	Country
7.Zip Code	
8.Phone#	
9.Contact Name	
10.Chain Code	
11.Chain SubCode1	
12.Chain SubCode2	
13.Chain SubCode3	
14.Chain SubCode4	

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Facility File Maintenance

The facility maintenance allows you to create and manage facilities for customer products.

Facility Code - Enter a two digit facility code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list of available facility codes.

Facility Name - Enter a facility name.

Facility Addr1 - Enter the first line of the facility address.

Facility Addr2 - Enter the second line of the facility address.

Facility Addr3 - Enter the third line of the facility address.

City - Enter the city for the facility.

State - Enter the state for the facility.

Country - Enter the country for the facility.

Zip Code - Enter the zip code for the facility.

Phone# - Enter the phone number for the facility.

Contact Name - Enter the contact name for the facility.

Chain Code - Enter a code for this facility if it is part of a chain of facilities. This chain code will be used to facilitate reporting in terms of sales and A/R data.

Chain SubCode1 - Enter a sub-code for this facility if it is part of chain of facilities. This sub-code will be used to facilitate reporting in terms of sales and A/R data.

Notes:

Facility File Maintenance	
Facility Code	12400
1.Facility Name	
2.Facility Addr1	
3.Facility Addr2	
4.Facility Addr3	
5.City	
6.State	Country
7.Zip Code	
8.Phone#	
9.Contact Name	
10.Chain Code	
11.Chain SubCode1	
12.Chain SubCode2	
13.Chain SubCode3	
14.Chain SubCode4	

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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Facility File Maintenance

Chain SubCode2 - Enter a sub-code for this facility if it is part of chain of facilities. This sub-code will be used to facilitate reporting in terms of sales and A/R data.

Chain SubCode4 - Enter a sub-code for this facility if it is part of chain of facilities. This sub-code will be used to facilitate reporting in terms of sales and A/R data.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Notes:

GPO Maintenance

GPO

1.Description

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
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GPO Maintenance

The GPO maintenance is used to keep a list of group purchasing organizations that your customers may be members of. The GPO can be assigned to a customer in customer maintenance and can also be assign to contracts in contract maintenance.

GPO - Enter a GPO code. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list of available GPO's you can select from.

Description – Enter a description for the GPO code.

ENTER LINE # TO CHANGE, DELETE TO DELETE, 0 TO ACCEPT:

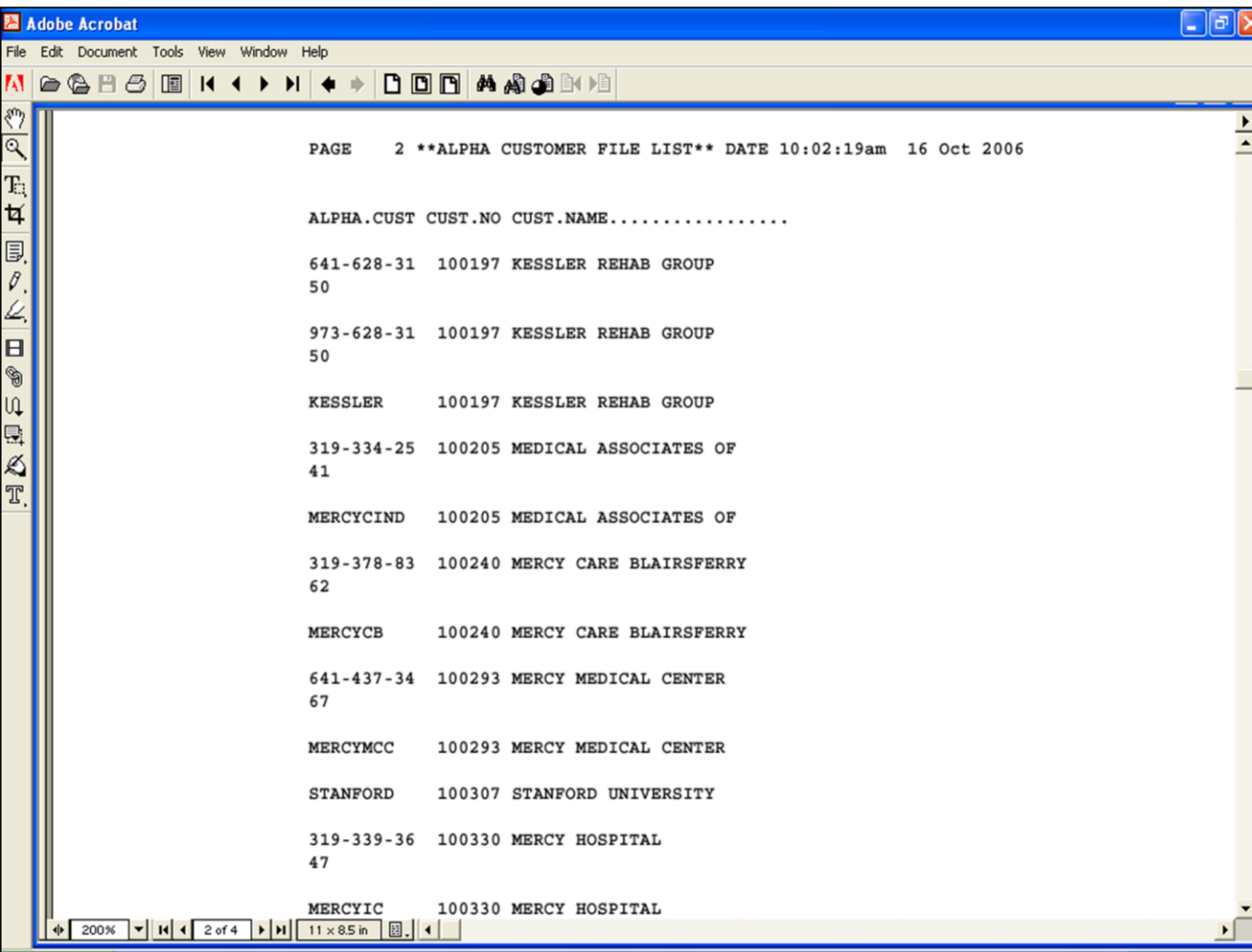
Enter a Zero (0) to accept, click on the 'OK/END' icon, press the 'F2' function key, or type in the word 'END' and hit <ENTER> to accept this entry.

The user can also enter Line Number to make desired changes.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to cancel out.

Enter 'DELETE' followed by *** to delete an existing record.

Notes:



Alpha Customer Listing

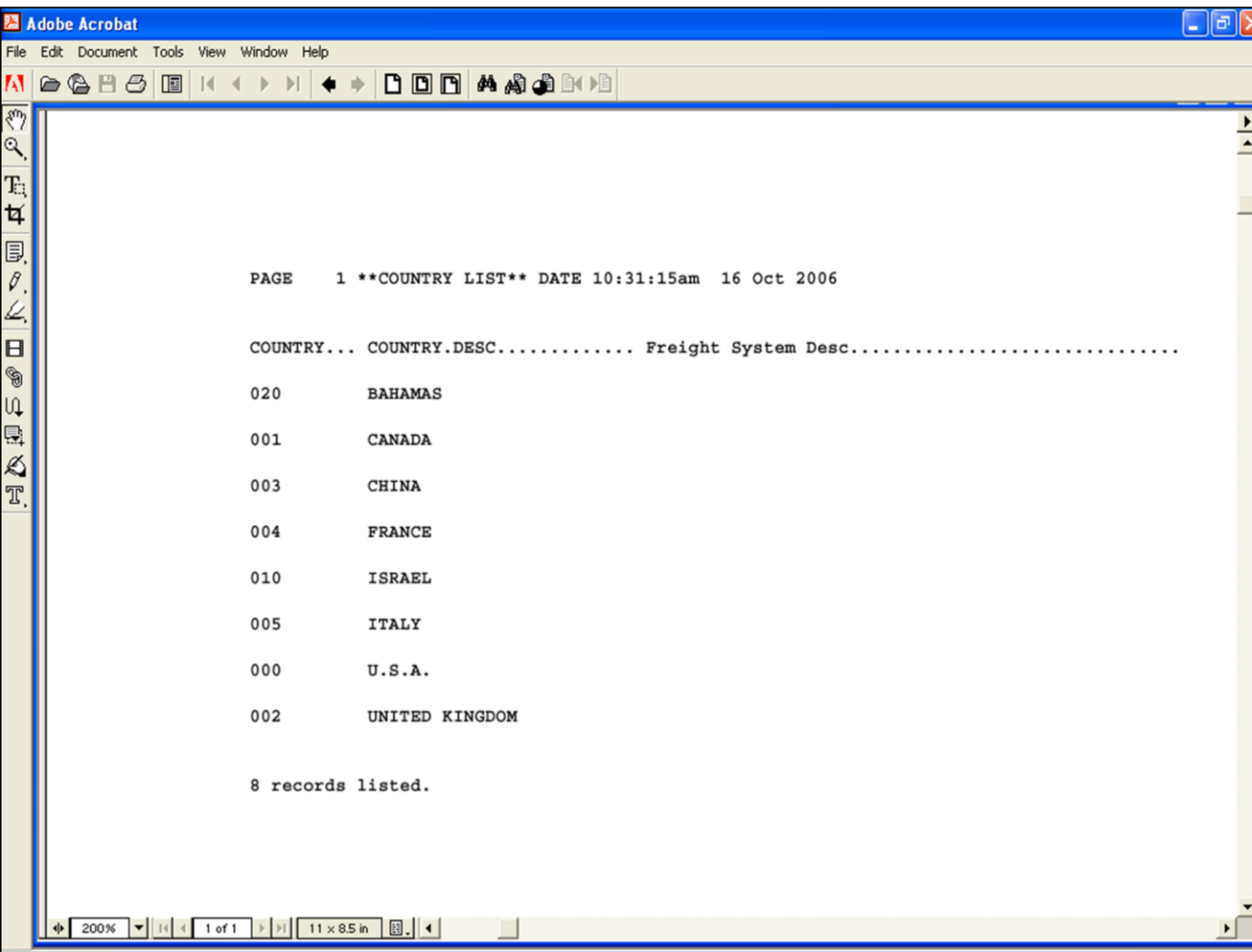
This listing prints the alpha customer number, the internal customer number and the customer name.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Country Listing

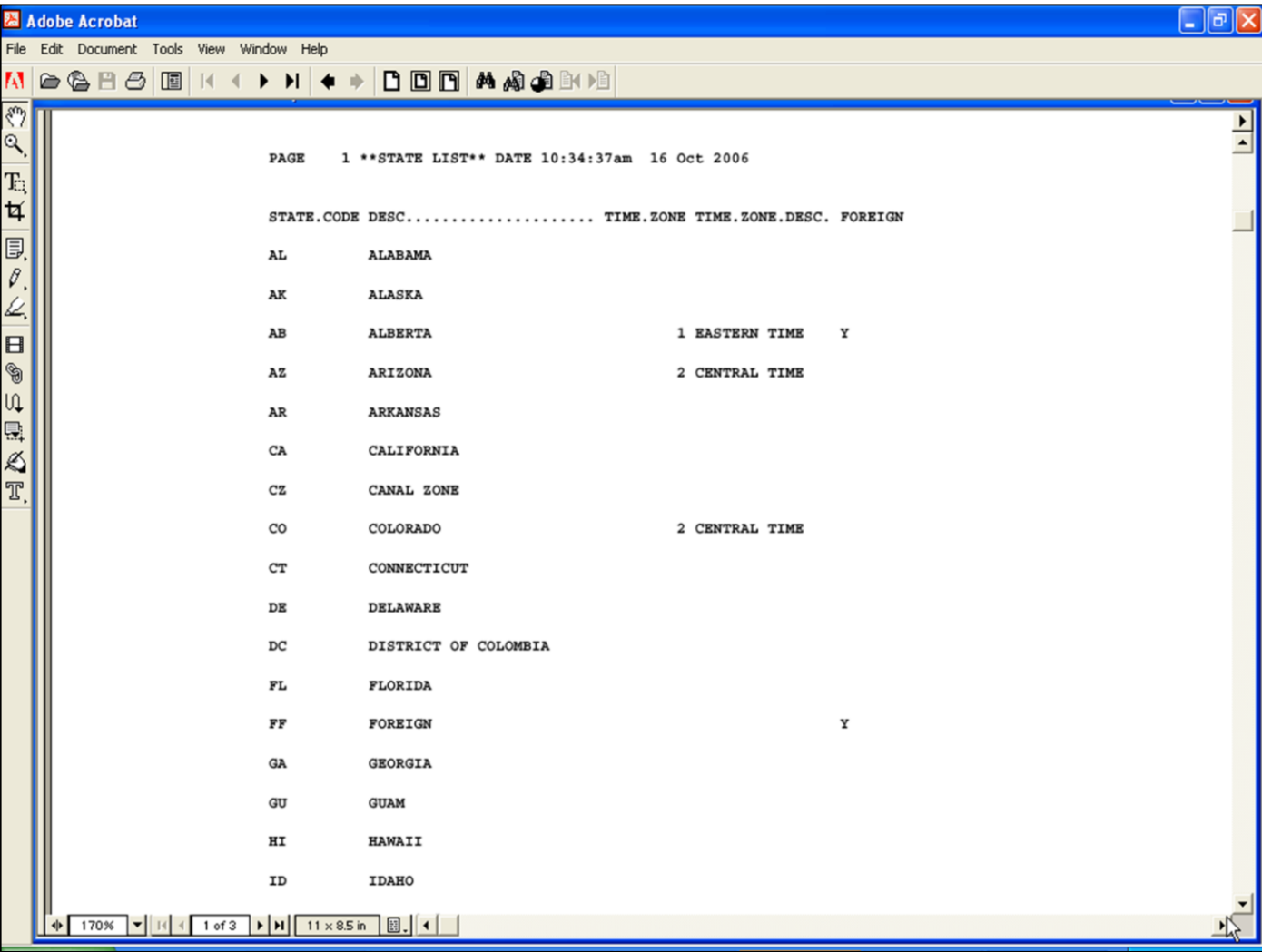
This listing prints the country code, country description and freight system description.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



State Code Listing

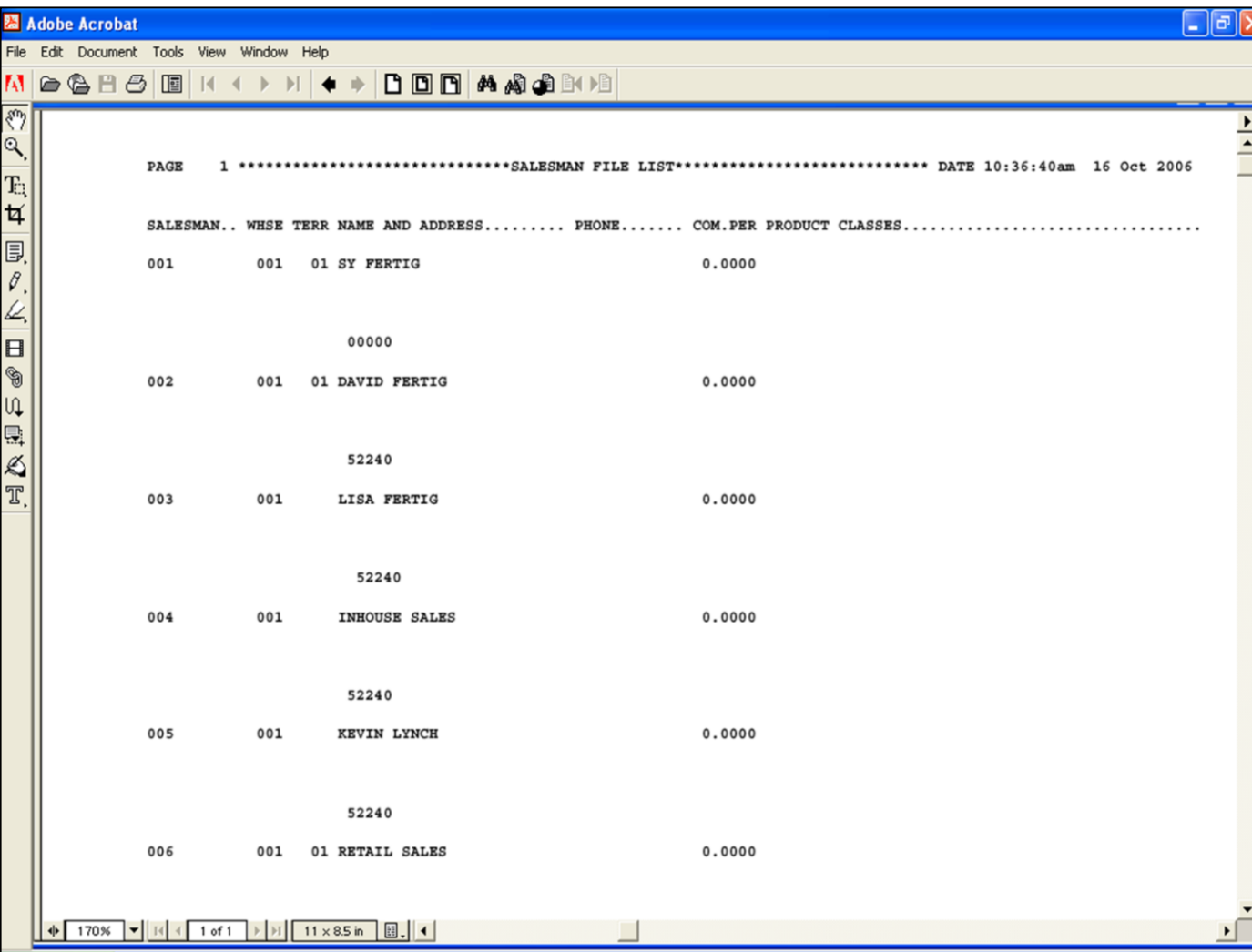
This listing prints the state code, description, time zone, time zone description and foreign indicator.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Salesman Listing

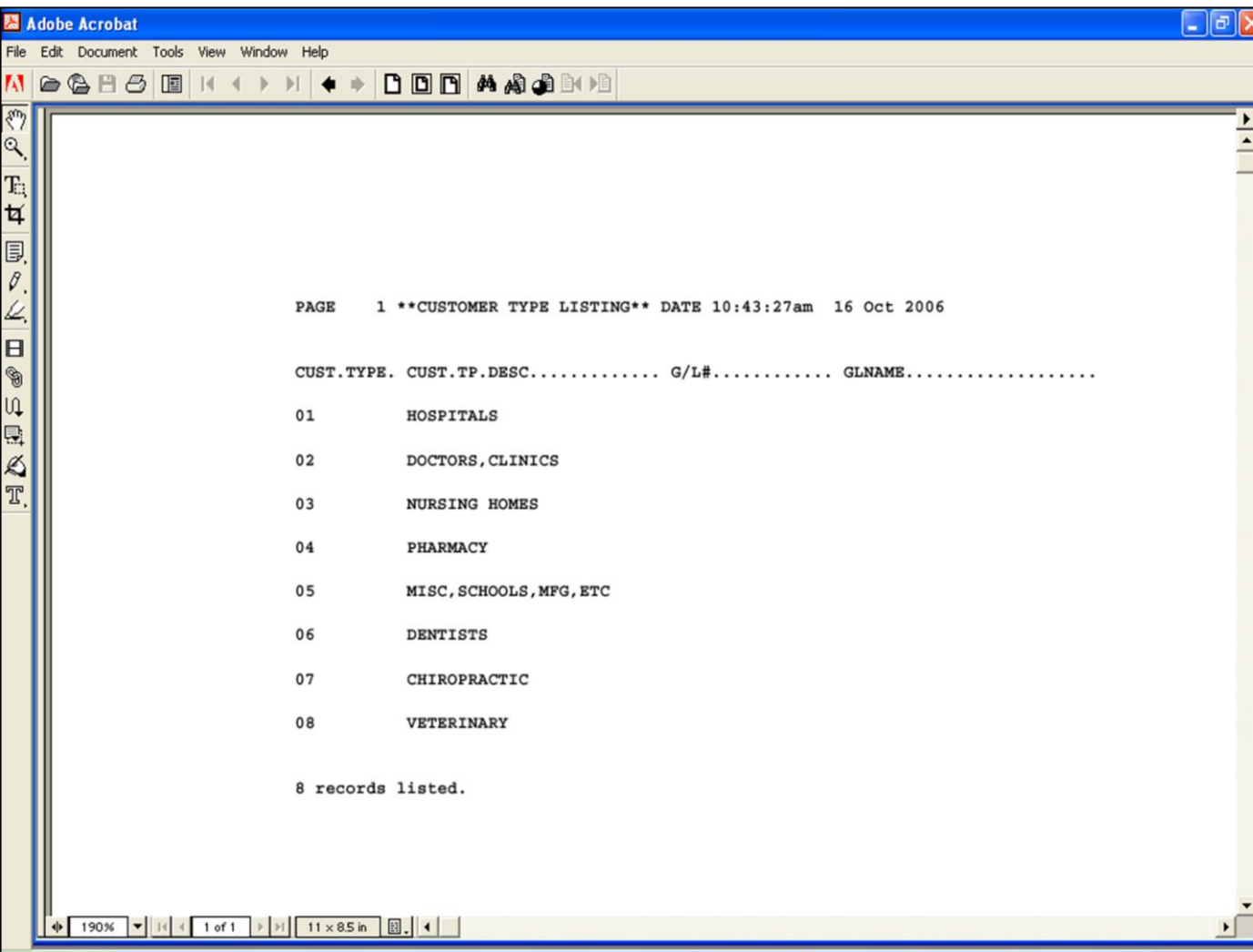
This listing prints the salesman code, warehouse, territory, salesman name and address, phone number, commission percentage, and product classes.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Customer Type Listing

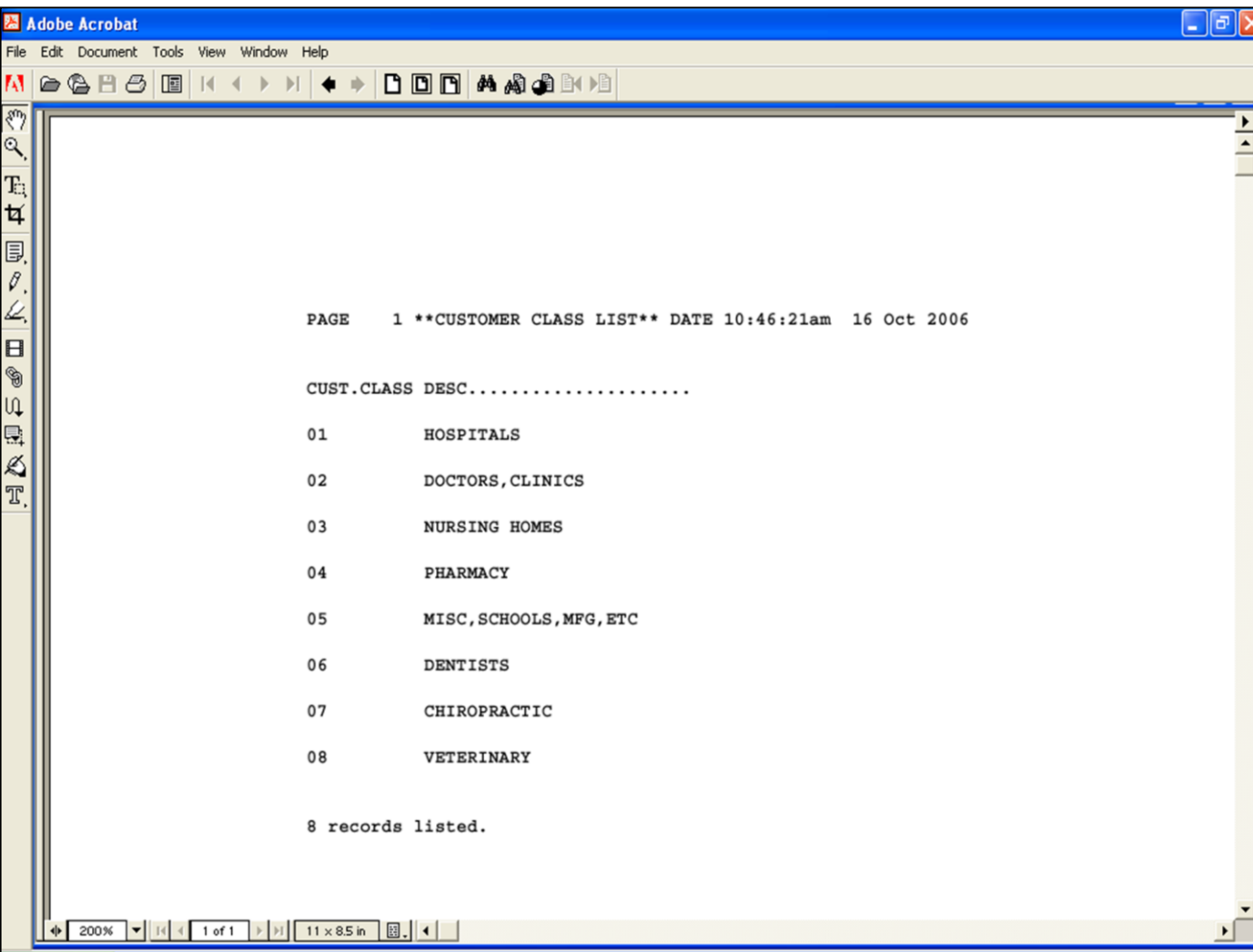
This listing prints the customer type, customer type description, general ledger number, and general ledger name.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Customer Class Listing

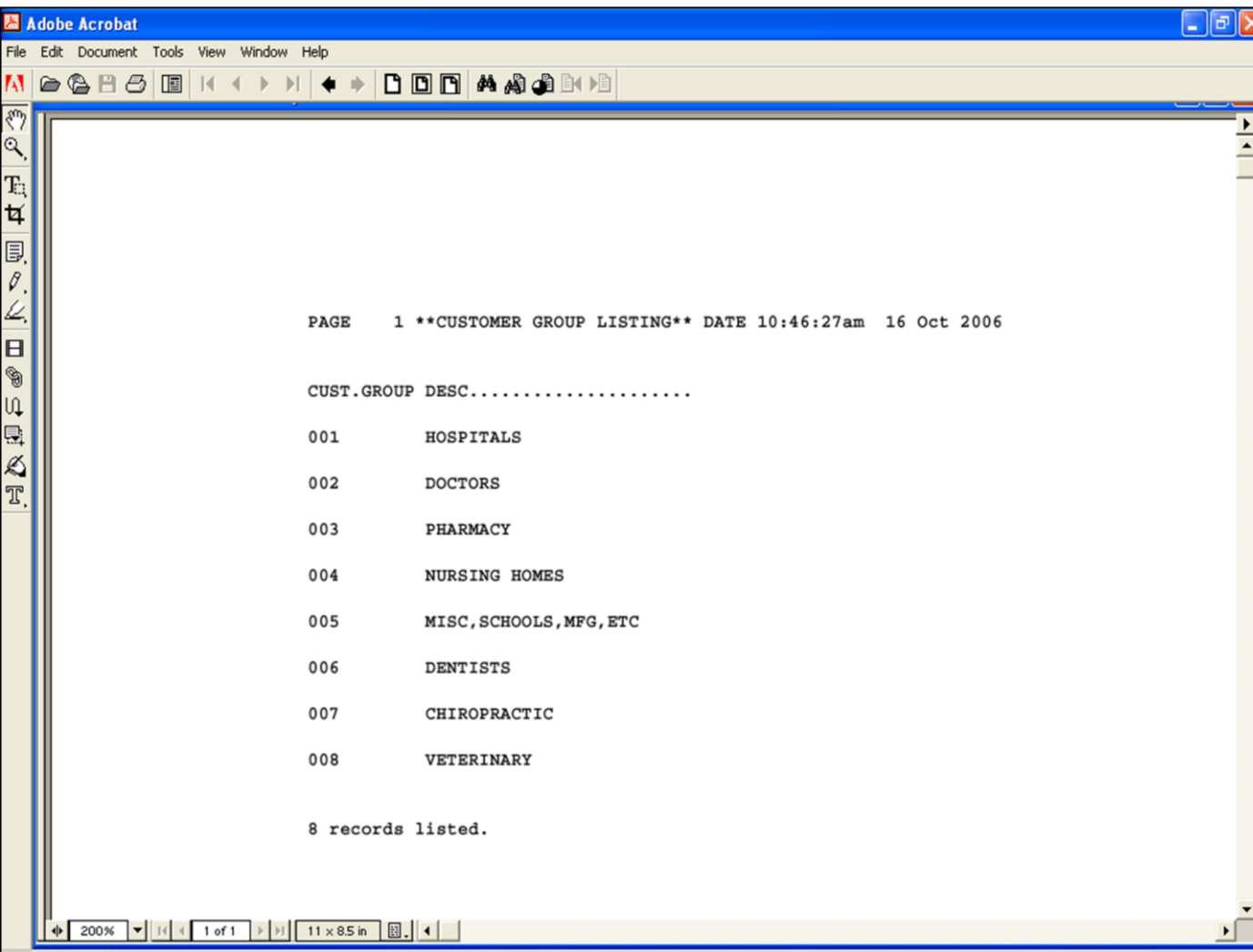
This listing prints the customer class and customer class description.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Customer Group Listing

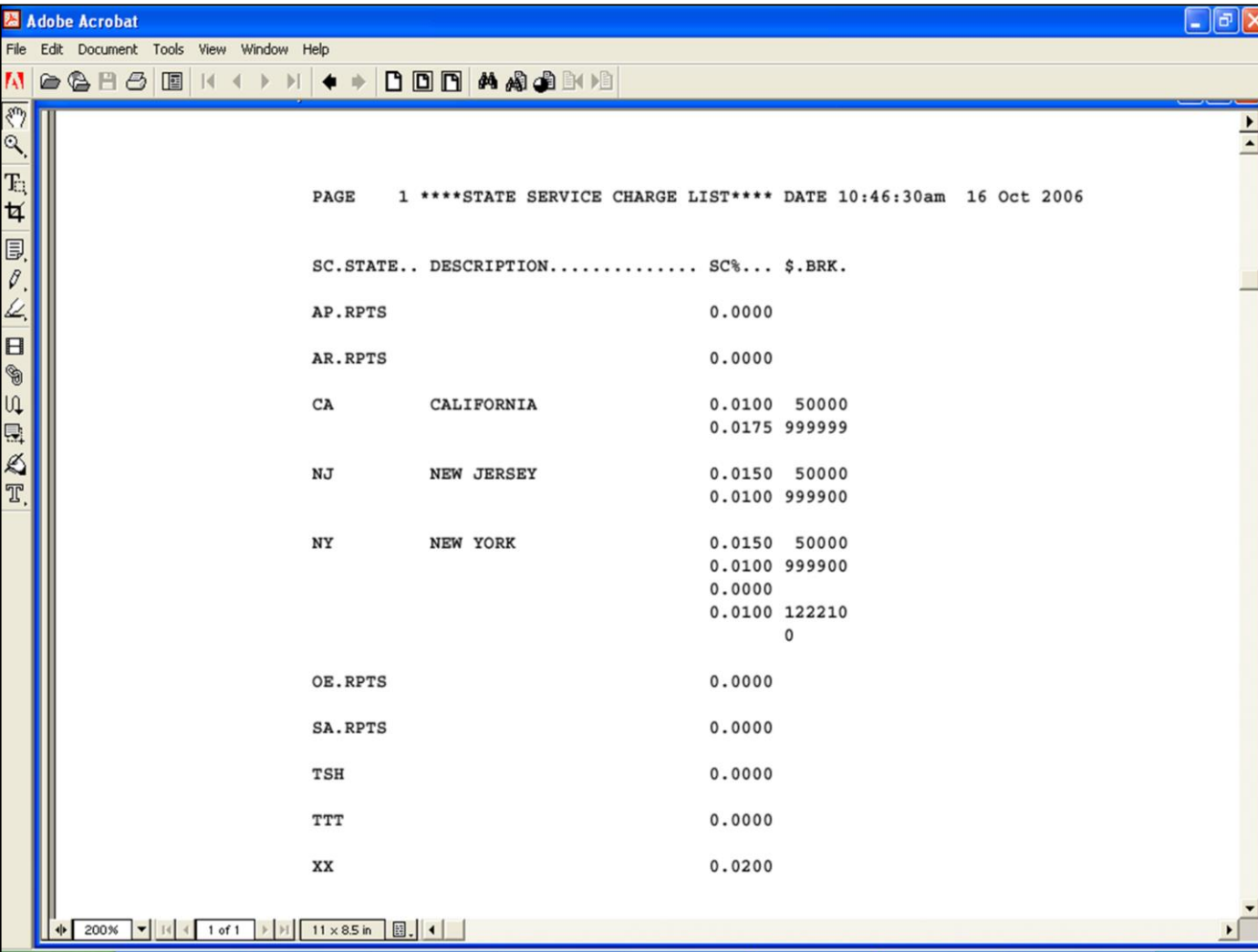
This listing prints the customer group and customer group description.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Service Charge Listing

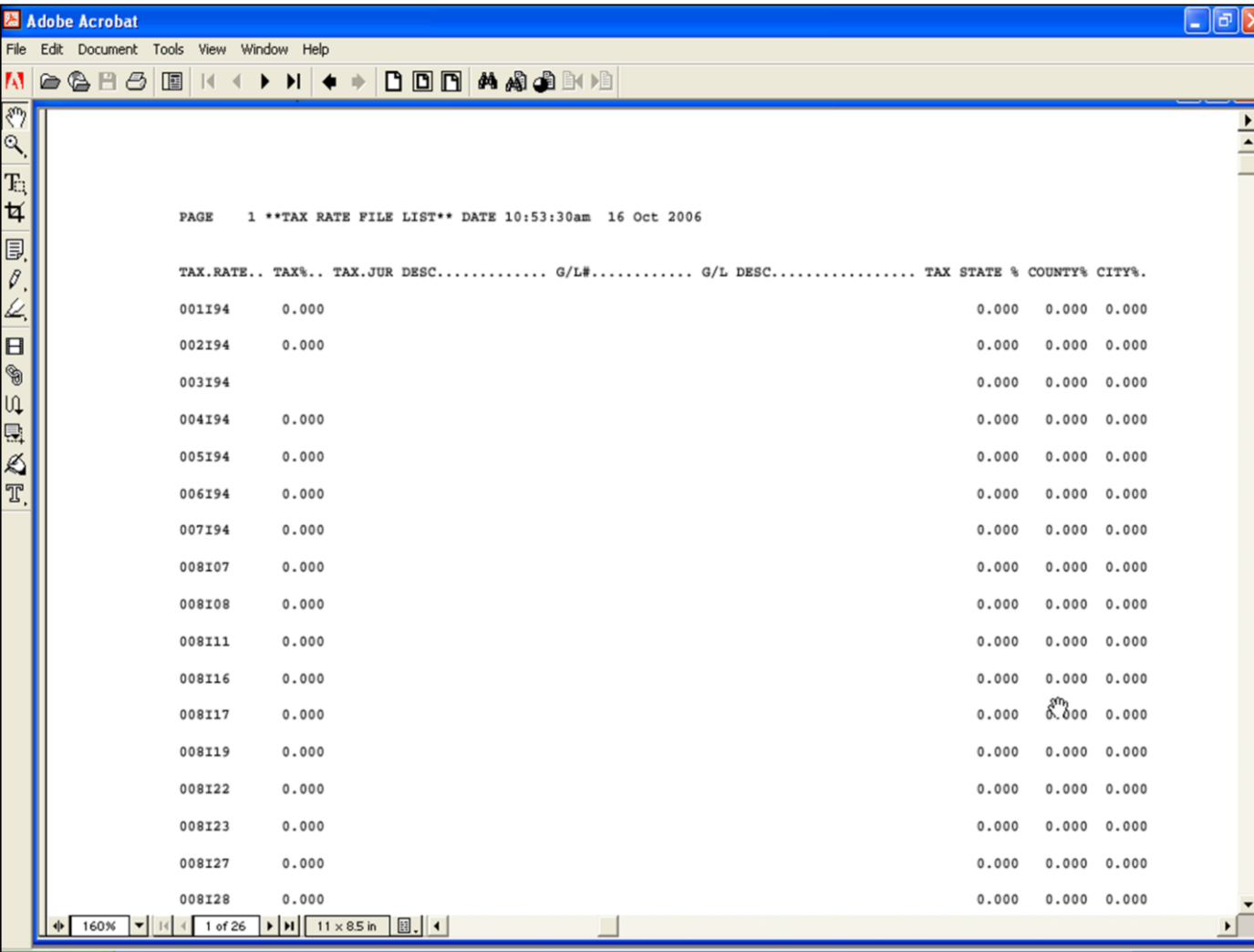
This listing prints the service charge, description, service charge percentage and dollar break amount.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Tax Rate Listing

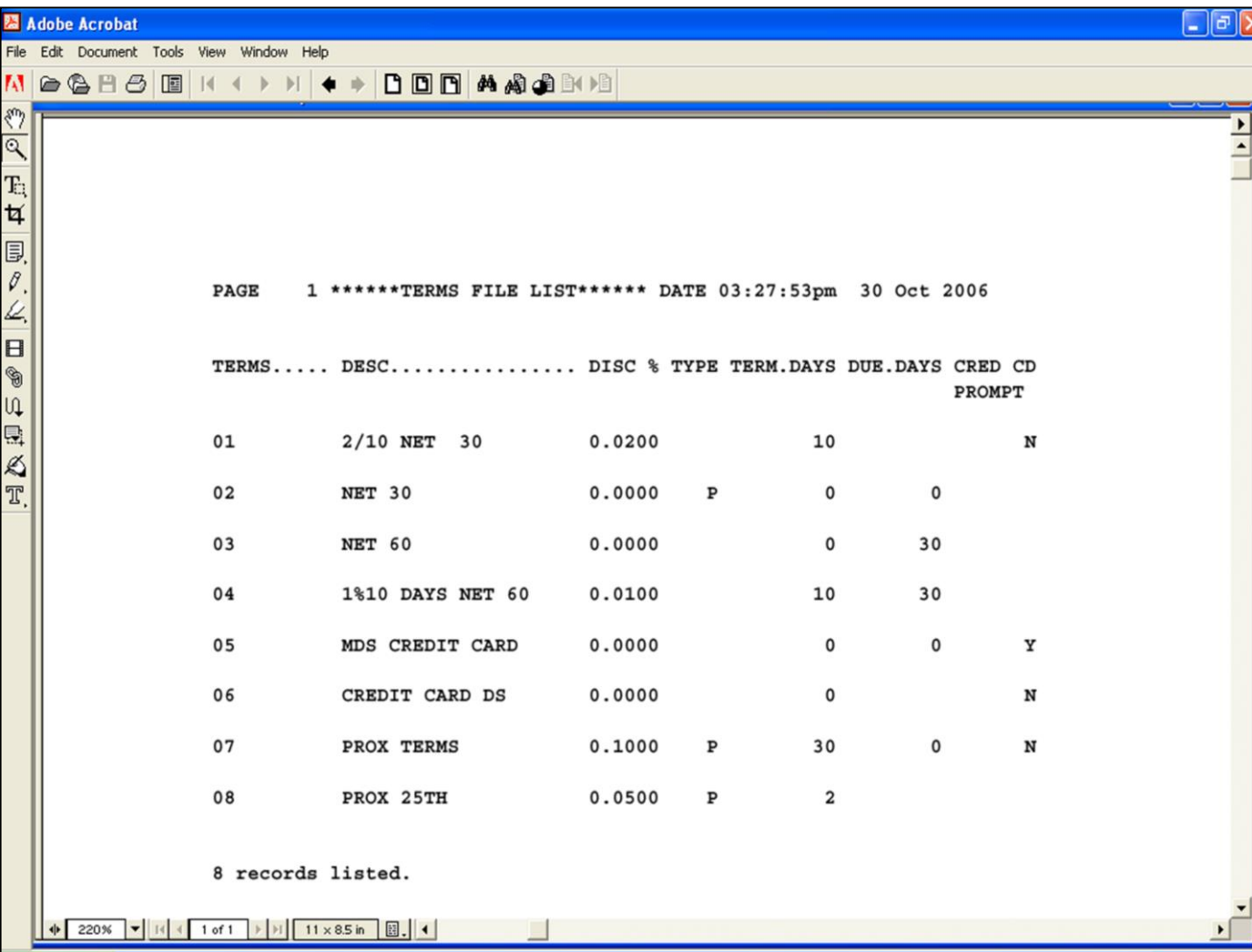
This listing prints the tax rate, tax percentage, tax jurisdiction, description, general ledger number, general ledger description, tax state percentage, county percentage and city percentage.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Terms Listing

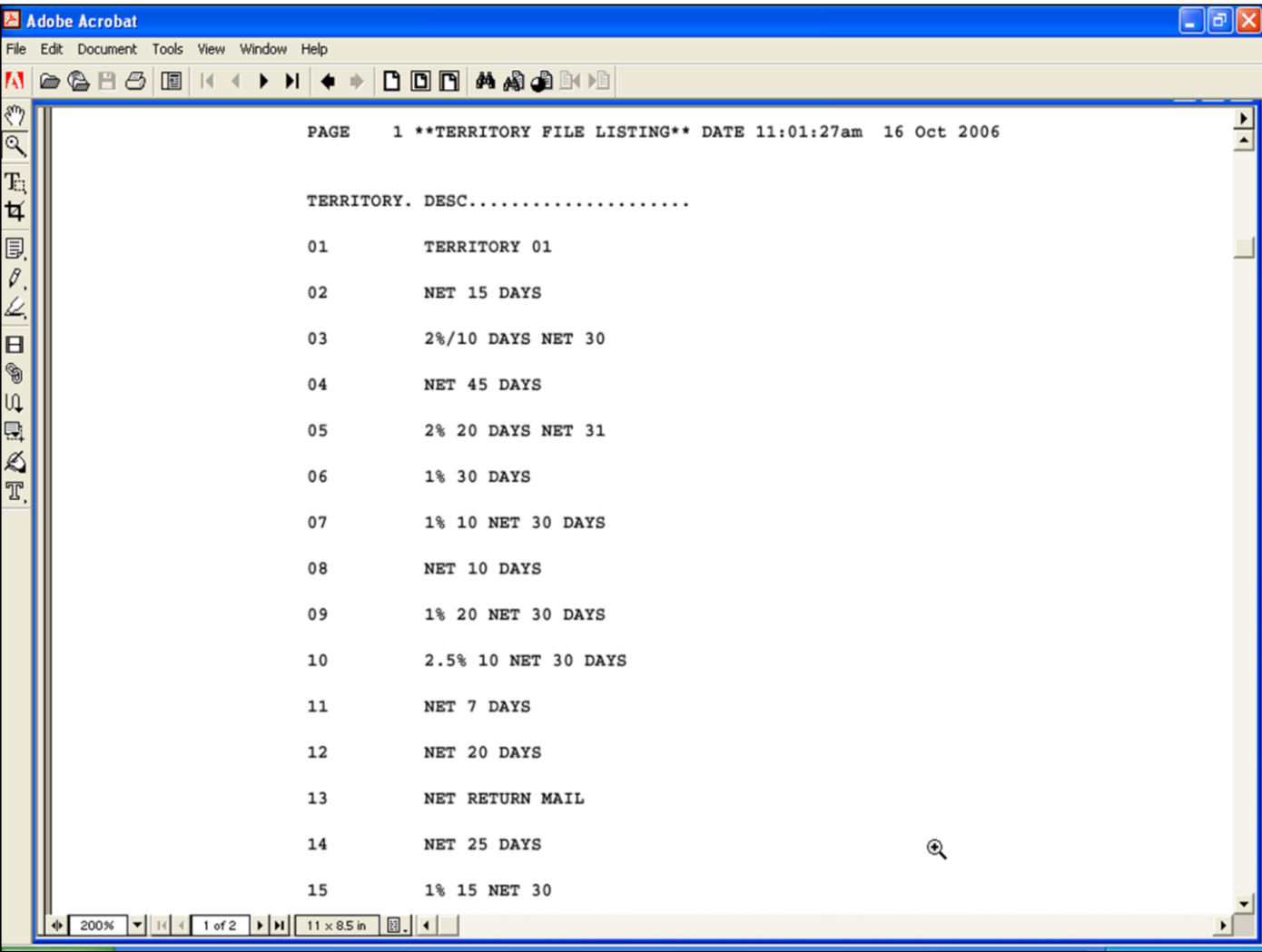
This listing prints the terms code, description, discount percent, type, term days, due days and credit card prompt indicator.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Territory Listing

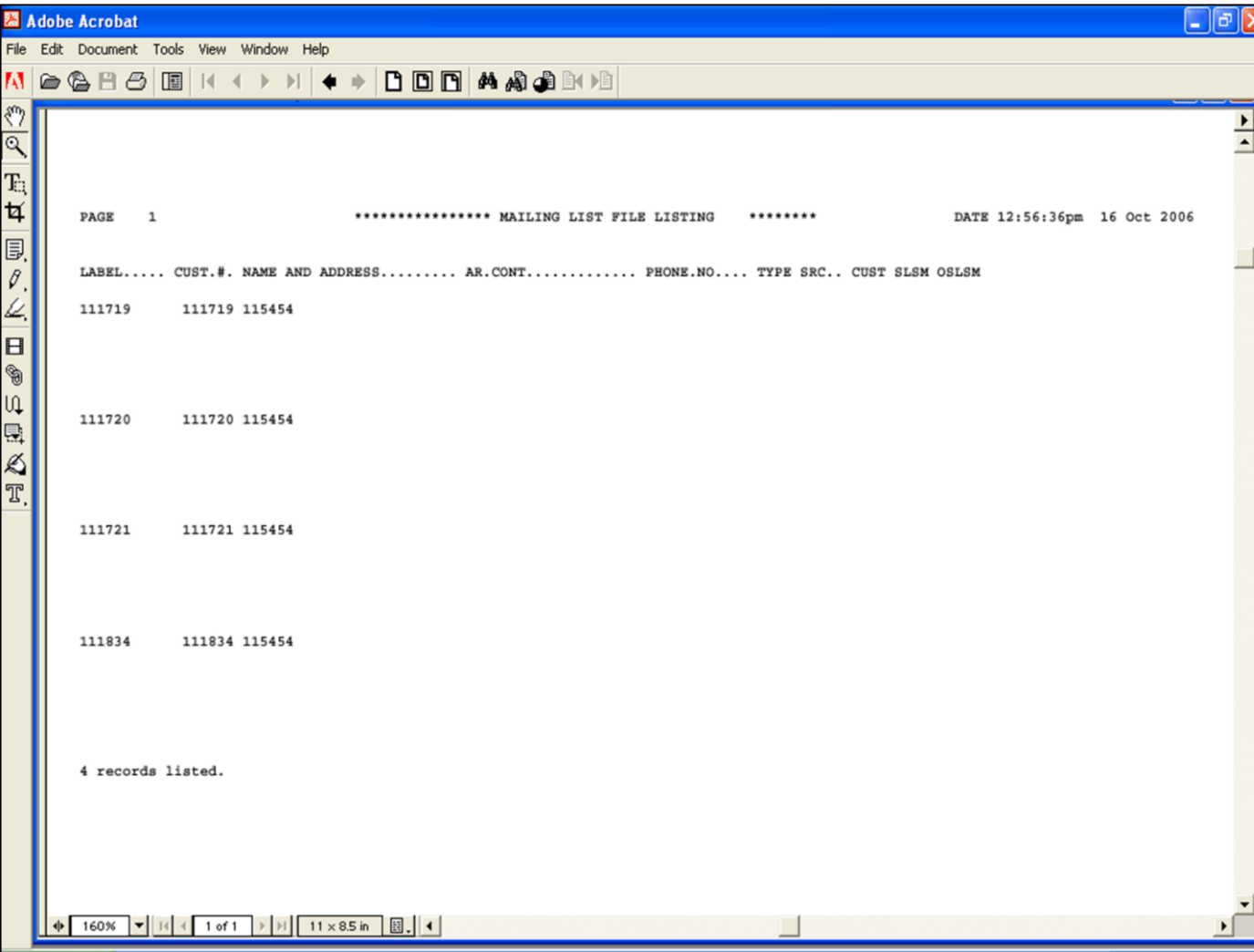
This listing prints the territory code and description.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Mailing System Listing

This listing prints the label, customer number, name and address, A/R contact, phone number, customer type, source, customer indicator, salesman and outside salesman.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:

PAGE 1 ***** PROSPECT MASTER FILE LISTING ***** DATE 01:03:28pm 16 Oct 2006

PROSPECT.MAST A.	PROSPECT.NO	NAME AND ADDRESS	Contact1	PROS.PHONE.NO	PROS.SLSM	STATUS	DATE	STATUS.TIME
100575	ABCOFS	ABCO FINANCIAL SERVICES PO BOX 7966 70 ARROW ROAD #5 HILTON HEAD SC 29928	JIM FRIEND	404-111-1111	001		09/17/03	13:00
100476	MARCOW	MICHAEL MARCOWITZ MD 4360 KENNEDY BLVD BROOKLYN NY 10023	MICHAEL MARCOWITZ	718-555-1212	002		05/21/03	14:00
100240	MERCYCB	MERCY CARE BLAIRSFERRY 1790 BLAIRSFERRY ROAD HIAWATHA IA 52233		319-378-8362	003			
100630	TRINITY	TRINITY MEDICAL CENTER 110 JOSEPH PLACE STATEN ISLAND NY 10314	JOE BUSH	718-111-1111	001		08/04/03	14:00
100139	UMC	UNIVERSITY MEDICAL CENTER ACCOUNTS PAYABLE/TRAVEL 400 BROADWAY AVE NEW YORK CITY NY 10016-1460	JOHN DOE	212-777-1111	001		05/22/03	12:00

5 records listed.

170% 1 of 1 11 x 8.5 in SnagIt Capture Preview

Prospect Master Listing

This listing prints the prospect master number, alpha prospect number, name and address, contact one, prospect phone number, prospect salesman, status date, status time.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:

Account:3808 DEMO.12 Port:808 Menu:CUST.LABELS Capture:On

Customer Label Printing Menu

1. Customer Label Print

2. Rolodex Label Print

3. Mailing List Label Print

4. Label Size Setup

Enter Selection or END :

OE	CONTACTS	MAINT	DRILL	EXECINQ	REPORTS	CAPT OFF	VIEW	CRM.MENU	VRM.MENU		
HELP	OK/END	INSERT	LDELETE	PREV.PG	NEXT.PG	INQUIRY	CANCEL	Off			Popup

Labels Sort Menu

The customer label sort menu allows you the option of printing labels in the multiple formats:

Customer Label Print

Rolodex Label Print

Mailing List Label Print

Label Size Setup

Notes:

Cust Labels by Zip

1. Zip Code

2. Enter Label Size (use F7 for lookup)

Press <RETURN> to Process Report, Line# to Change, or ABORT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
------	--------	--------	---------	---------	---------	---------	--------	-----	--	--	-------

Notes:

Customer Label Print

Customer Labels by Zip Code

Zip Code - At this prompt the operator has the option of selecting 'All Zip Codes', 'Zip Code Range' or 'Specific Zip Code'.

Enter Label Size (use F7 for lookup) – Enter a label size, or you can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list for you to select from the available labels sizes.

After making the appropriate selection and entering 'OK', you must enter label size, you can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for a label size.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Cust Label by Name

1. Enter Label Size (use F7 for lookup)

Press <RETURN> to Process Report, Line# to Change, or ABORT :

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off							Popup
------	--------	--------	---------	---------	---------	---------	--------	-----	--	--	--	--	--	--	-------

Customer Labels by Name

Enter Label Size - you can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for a label size.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:

Cust Label by Cust No

1. Customer# All [] []

2. Enter Label Size (use F7 for lookup) [] 5161

Press <RETURN> to Process Report, Line# to Change, or ABORT : []

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
------	--------	--------	---------	---------	---------	---------	--------	-----	--	--	-------

Notes:

Customer Labels by Cust No

Customer Labels by Customer Number:

At this prompt the operator has the option of selecting 'All Customers', 'Customer Range' or 'Specific Customer'.

Customer#- If 'All' is selected, customer labels will print for all customers. If 'Customer Range' or 'Specific Customer' is selected, you will need to enter a customer number, or enter the beginning customer number to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Enter Label Size (use F7 for lookup) – Enter a label size or you can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for a label size.

After making the appropriate selection and entering 'OK', you must enter label size, you can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for a label size.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

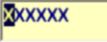
Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Cust Labels by Cust Type

1. Customer Type

2. Enter Label Size (use F7 for lookup)

Press <RETURN> to Process Report, Line# to Change, or ABORT :



HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off	Pop-up
									show hidden icons

Customer Label by Cust Type

Customer Labels by Customer Type

Customer Type -At this prompt the operator has the option of selecting 'All Customer Types', 'Customer Type Range' or 'Specific Customer Type'. If 'All' is selected, customer labels will print for all customer types. If 'Customer Range' or 'Specific Customer' is selected, you will need to enter a customer type, or enter the beginning customer type to initiate the lookup routine, click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for the customer.

Enter Label Size (use F7 for lookup) – Enter a label size or you can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for a label size.

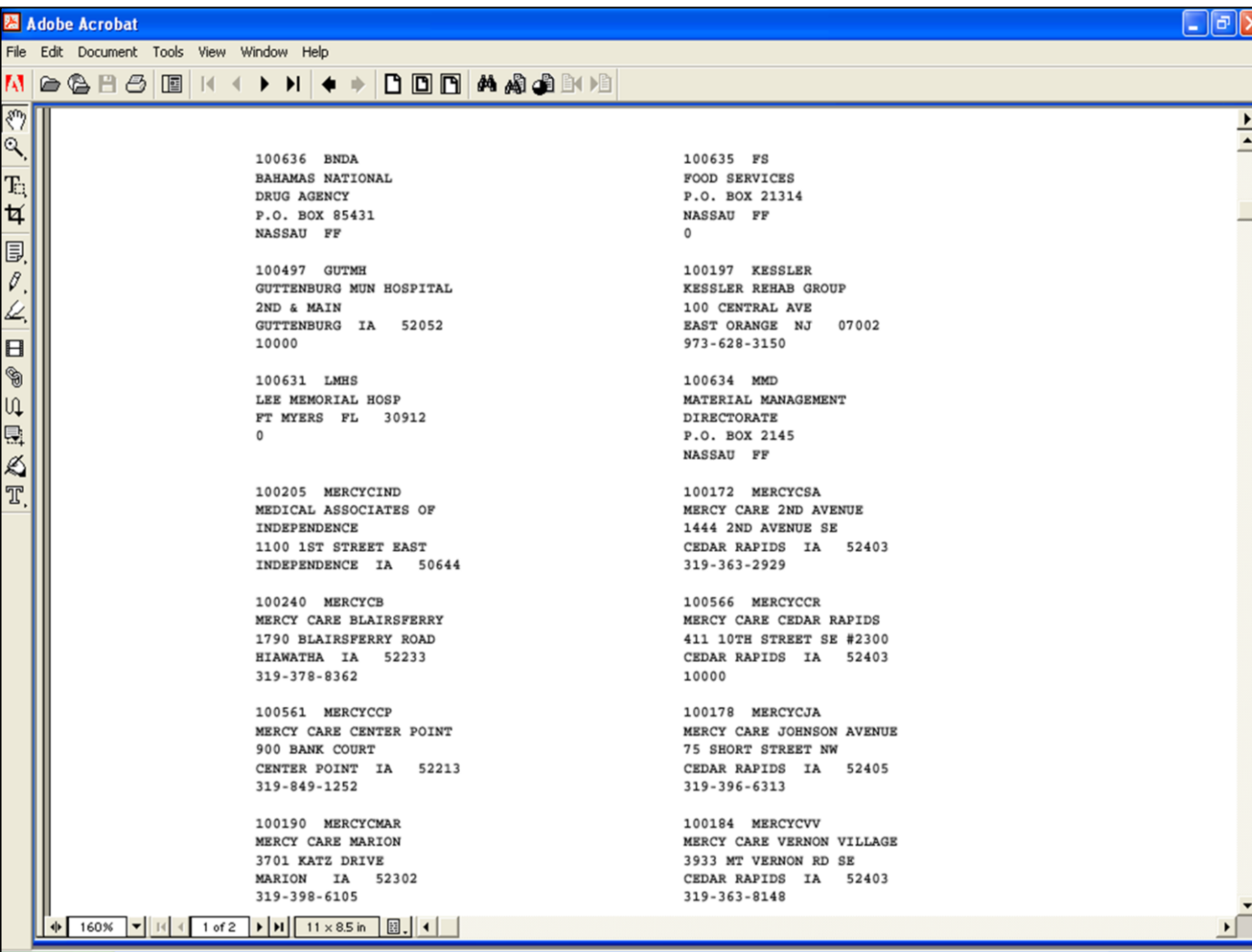
After making the appropriate selection and entering 'OK', you must enter label size, you can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for a label size.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Rolodex Label Print

This listing prints all customer contact information labels in a rolodex format.

Enter Label Size (use F7 for lookup) - Enter the label size, or you can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for a label size.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:

Mailing List Labels - by Zip Code

1. Enter Label Size (use F7 for lookup)

5161

Press <RETURN> to Process Report, Line# to Change, or ABORT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
------	--------	--------	---------	---------	---------	---------	--------	-----	--	--	-------

Notes:

Mailing List Label Print

This listing prints all mailing list customer labels in a selected label size.

Enter Label Size - Enter the label size, or you can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the pop-up inquiry box to search for a label size.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

LABEL SETUP FILE

Label ID 5160

1.Label Description AVERY 5160

2.Count 3
 3.Rows 5
 4.Skip 1
 5.Indent 0
 6.Size 30
 7.Spaces 4
 8.Blank C

ENTER LINE # TO CHANGE,DELETE TO DELETE,0 TO ACCEPT :

XXXXXX

HELP	OK/END	INSERT	LDELETE	PREV PG	NEXT PG	INQUIRY	CANCEL	Off			Popup
------	--------	--------	---------	---------	---------	---------	--------	-----	--	--	-------

Notes:

Label Size Setup

The label setup file allows the operator to specify label characteristics and print formats.

Label ID - Enter the label ID. You can also click on the 'INQUIRY' icon or press the 'F7' function key which opens the drop-down list box that displays all label ID's available.

Label Description - Enter a description for this label.

Count - Enter the number of labels to be printed across the page.

Rows - Enter the number of lines to be printed per label.

Skip - Enter the number of blank spaces that will appear vertically between labels.

Indent - Enter the number of spaces from the left edge of the paper to the first label. It can be zero.

Size - Enter the maximum number of characters in a row.

Spaces - Enter the number of blank lines that will appear horizontally between labels.

Blank - Enter 'C' to skip a line if there is no data, leave null to print blank spaces if there is no data.

Example: If a label has a second address line and it is blank for a customer, the label can print one of two ways:

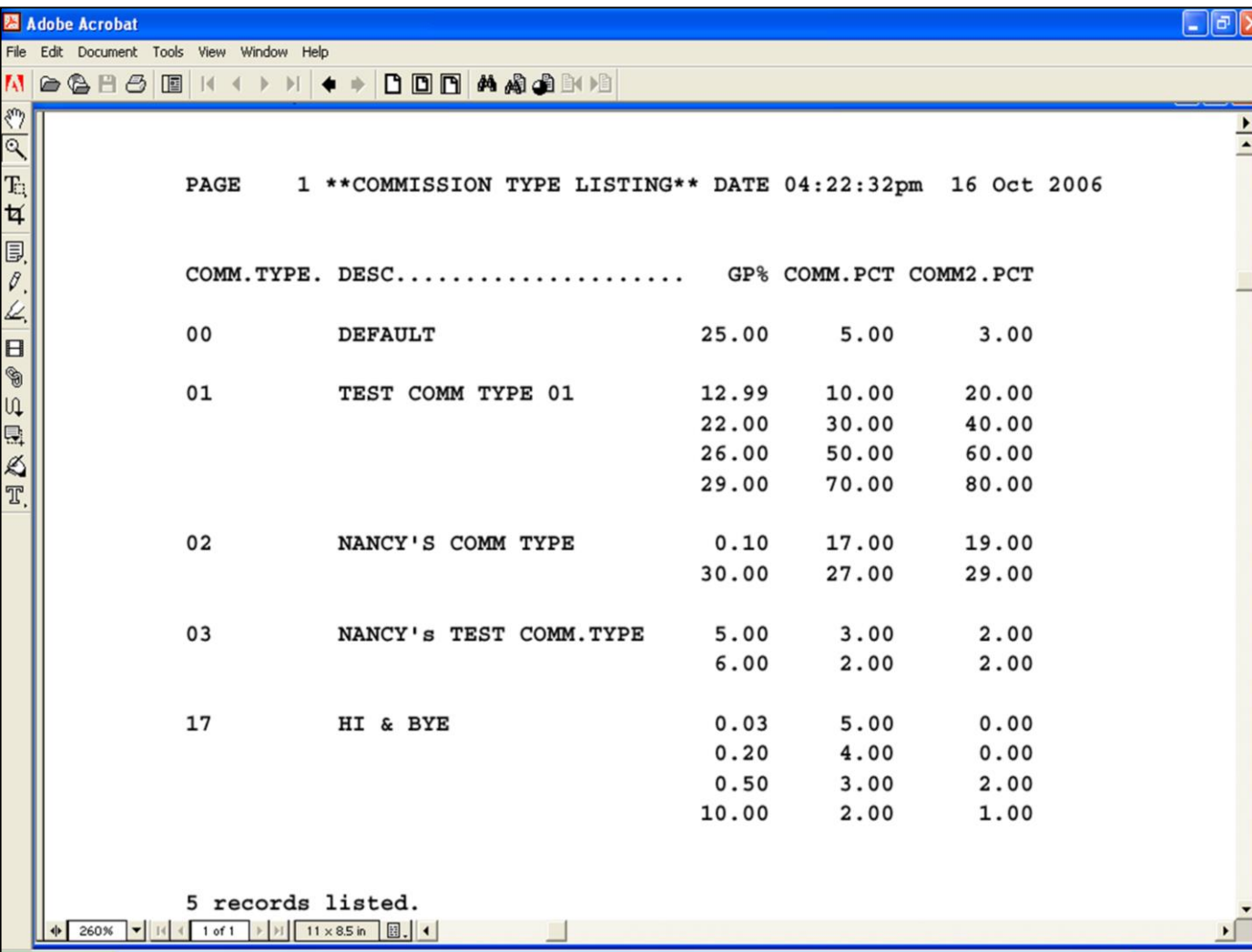
Blank = C

Name
 Address Line 1
 City, State Zip

Blank = Null

Name
 Address Line 1

City, State Zip



Commission Type Listing

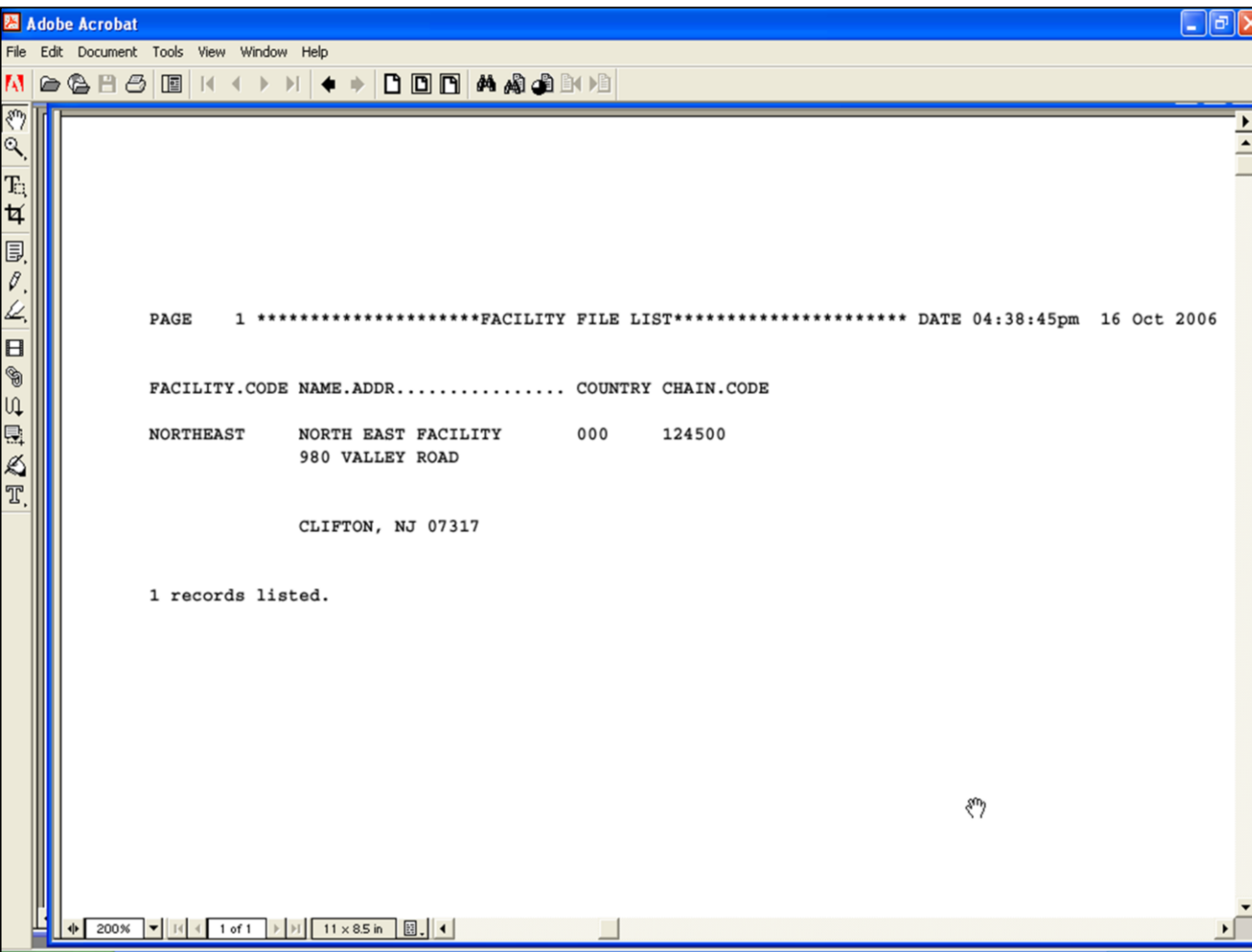
This listing prints the commission type, description, gross profit percent, commission percent, and commission two percent.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



Facility Listing

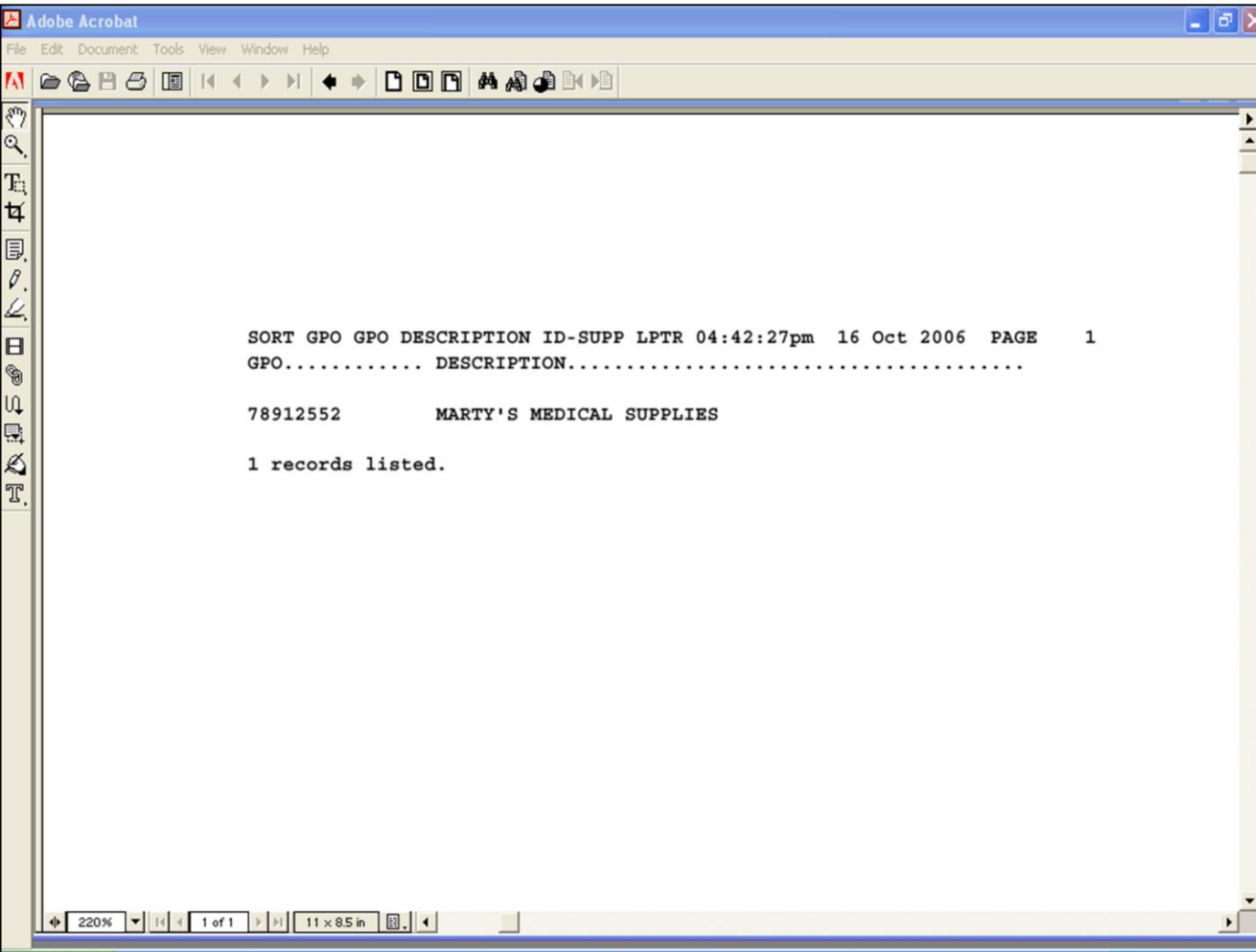
This listing prints all facility based information including the facility code, name and address, and the chain code.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:



GPO Listing

This listing prints the GPO number and description.

Press <RETURN> to Process Report, Line# to Change, or ABORT:

Press 'RETURN', enter a Zero (0), click on the 'OK/END' icon, or press the 'F2' function key to process the report.

Enter 'ABORT', press 'F8' function key or click on the 'CANCEL' icon to delete this entry.

Notes:

Comments:



Where to Get More Information

- To contact support call 973-777-8050 or fax 973-777-3063.
- To access the The System's House website the address is:
www.tshinc.com.

Notes:
