



FTD Mercury[®]



Simply Easier. Simply Better. Simply Mercury.[™]

Reference Guide

FTD Mercury Reference Guide (version 10.1)

© 2005–2008 Florists' Transworld Delivery, Inc.

Printed in U.S.A. October 24, 2008

All Rights Reserved

Notice:

While reasonable efforts were made to ensure that the information in this document was complete and accurate at the time of printing, corrections and changes may be incorporated into future releases.

The following are trademarks of Microsoft Corporation in the United States and other countries: Windows® XP operating system, Windows Server™ 2003 operating system, Microsoft Word®, and Microsoft Excel®, and MapPoint®.

The Dove Network® is a trademark of Teleflora®, Inc.

The Motorola® i355™ phone is a trademark of Motorola, Inc.

Peachtree® Accounting Copyright 1992–2008, Peachtree Software Inc. All rights reserved.

QuickBooks® Copyright 1999–2008, Intuit Inc. All rights reserved.

This product includes software developed by the Apache Software Foundation (<http://www.apache.org/>).

All other trademarks are property of their respective owners.

Proprietary Statement:

FTD Mercury (version 10.0) is the proprietary property of Florists' Transworld Delivery, Inc. and is protected by United States copyright laws and other laws protecting intellectual property rights as well as international treaties. You may use FTD Mercury (version 10.0) only in accordance with the license terms between yourself and Florists' Transworld Delivery, Inc.



Simply Easier. Simply Better. Simply Mercury.™

Contents

- 1: Overview..... 1-1**
 - About This Reference Guide 1-2
 - Documentation Conventions..... 1-2
 - Resources for Help 1-2
 - Using FTD Mercury Help..... 1-2
 - Using Online Help 1-3
 - The Contents, Index, Search, and Favorites Tabs..... 1-3
 - Hyperlinks and Breadcrumbs 1-4
 - FTD Mercury Technical Support..... 1-4
 - Other Important Phone Numbers..... 1-4
 - Flowers All Hours..... 1-4
 - Florists Online 1-5
 - FTD Flower Exchange 1-5
 - FTD WebGifts..... 1-6
 - Interflora 1-7

- 2: Basic Operations..... 2-1**
 - FTDStartup and FTDSshutdown 2-2
 - Logging In 2-3
 - System Login Window..... 2-3
 - Connection Error Window..... 2-3
 - Setting the Date and Time..... 2-3
 - FTD Mercury Main Menu Window 2-4
 - Using the FTD Mercury Main Menu 2-10
 - Exiting FTD Mercury 2-11
 - Address Check Window 2-11
 - Note Entry Window..... 2-11
 - Setting Up Your Printers 2-11
 - Checking Your Windows Default Printer 2-11
 - Setting Up Your Reports Printer..... 2-12
 - Setting Up Your Mercury Message Printer..... 2-12
 - Printer Form Settings Window..... 2-12
 - Setting Up Your Printers and Form Selections..... 2-13
 - Connecting to Network Printers 2-13
 - Receiving Orders and Messages 2-13

Setting Up Your Employees and Passwords	2-14
Backing Up Your Data	2-14
Daily/Weekly/Monthly Checklists	2-14
Daily Checklist	2-14
Weekly Checklist	2-16
Monthly Checklist	2-16
Configuring Your System	2-16
FTD Mercury Configuration Window	2-17
Software License Window	2-19
About Window	2-19
Video Chat	2-20

3: The Mercury Network 3-1

Host Computer Operations	3-1
Hours of Operation	3-2
FTD International Retrans Service	3-2
Preparing Your Retrans Order	3-3
Retrans Charges	3-3
International Retrans Service Hours of Operation	3-3

4: Mercury Messages 4-1

Mercury Message Types	4-1
Searching for Mercury Messages	4-2
Message Center	4-3
Message Center Window	4-3
Working with Message Center	4-9
Attaching Incoming Orders	4-9
Handling Messages that Require Attention	4-9
Dealing with Incoming Reject Messages	4-11
Opening Orders Related to Messages	4-11
Creating New Mercury Messages	4-11
New Message Window	4-12
Responding to Mercury Messages	4-12
Responding to Incoming Messages	4-13
Responding to Outgoing Orders	4-14
Requesting a Price Change	4-15
Acknowledging Messages	4-15
Acknowledgement Window	4-16
Rejecting Incoming Orders	4-16
Deleting Messages from Message Center	4-16
Printing Messages	4-17
Mercury Order Message	4-17
Helpful Hints on Sending a Mercury Order	4-17
Auto Select	4-18
Recording a Phoned-In Order	4-18
Message Responses	4-18
Message Response Window	4-19
ASK Message	4-19

Sending an ASK Message.....	4-19
Create ASK Message Window.....	4-20
ANSwer Message.....	4-21
Sending an ANSwer Message.....	4-21
Create ANS Message Window.....	4-22
CANcellation Message.....	4-23
Sending a CANcel Message.....	4-24
Create CAN Message Window.....	4-24
CONfirmation Message.....	4-25
Sending a CONfirmation Message.....	4-26
Create CON Message Window.....	4-26
Delivery Confirmation Message (ANS).....	4-27
Sending an Automatic Delivery Confirmation Message.....	4-28
Sending a Manual Delivery Confirmation Message.....	4-28
Delivery Confirmation Message (ANS) Window.....	4-29
DENy Message.....	4-30
Sending a DENy Message.....	4-30
Create DEN Message Window.....	4-31
FORward Message.....	4-32
Sending a FORward Message.....	4-32
Create FOR Message Window.....	4-33
REJect Message.....	4-34
Sending a REJect Message.....	4-34
Create REJ Message Window.....	4-35
Miscellaneous Mercury Messages.....	4-36
GENeral Message.....	4-36
Sending a GENeral Message.....	4-37
General Message Window.....	4-37
General Message Detail Window.....	4-37
ADJustment Report Message.....	4-38
Sending an ADJustment Report Message.....	4-38
Adjustment Message (ADJ) Window.....	4-39
REC Message List (REC).....	4-40
Sending a REC Message.....	4-40
REC Message List Window.....	4-41
SUSpend and RESume Messages.....	4-42
SUSpend Message.....	4-42
Sending a SUSpend Message.....	4-42
Suspend Message (SUS) Window.....	4-43
RESume Message.....	4-43
Sending a RESume Message.....	4-43
Resume Message (RES) Window.....	4-44
RETrieval Message.....	4-44
Sending a RETrieval Message.....	4-45
Retrieval Message (RET) Window.....	4-45
Order Detail View Window.....	4-47
Message Locate Error Window.....	4-48
5: Florist Directory & Search.....	5-1
Bi-Monthly Directory Update.....	5-1
Configuring Your System for Bi-Monthly Directory Updates.....	5-1

Downloading Directory Updates	5-2
Banner Ads	5-3
Searching for Florists	5-3
Florist Search Tips	5-4
Maps (Time Zones) Window	5-9
Florist Status	5-10
Looking Up Your Directory Listings	5-11
My Listings Window	5-11
Closest City Search	5-11
Searching for the Closest City	5-11
Close City Match Window	5-12
Closest City County Selection Window	5-12
Closest City Search Window	5-13
Facility Search	5-13
Facility Search Window	5-14
Facility Detail Window	5-14
Facilities for a Florist Window	5-15
Distance Map Window	5-15
6: Managing Employees	6-1
Adding Employees	6-1
Editing Existing Employee Information	6-2
Requiring Employee Names in Order Entry and Point of Sale	6-2
Changing Employee Passwords	6-3
FTD Server Password Window	6-3
Terminating an Employee in Your System	6-3
Activating Terminated Employees	6-4
Handling Employee Payroll	6-4
Tracking Employee Time	6-4
Employee Reports	6-5
Employee Types	6-5
Adding Employee Types	6-5
Removing Employee Types	6-5
Job Functions	6-5
Adding Job Functions	6-6
Removing Existing Job Functions	6-6
Security	6-6
Setting Employee-Level Security	6-7
Employee Security Window	6-7
Setting Job Function-Level Security	6-7
Job Function Security Window	6-8
Setting Window Access for Employees	6-8
Searching for Employees	6-9
Employee Search Window	6-9
Employee History Information Window	6-10
Employee Sales Report Window	6-10

7: Customer Maintenance	7-1
Customer Detail Information Window	7-1
General Tab	7-2
House Account Tab.....	7-5
Statistics Tab	7-8
Customer Account Balance Detail Window	7-9
Customer Account Balance Detail Report.....	7-10
Credit Cards Tab.....	7-13
Customer Credit Card Window	7-13
Contacts Tab	7-14
Order History Tab.....	7-16
Marketing Tab.....	7-17
Statement Tab.....	7-18
Standing Order Tab.....	7-20
Standing Order Scheduler Window.....	7-21
Adding New Customers	7-24
Customer Search	7-26
Searching for Customers.....	7-26
Customer Search Window.....	7-26
Setting Up House Accounts	7-29
Viewing Customer Statistics	7-31
Maintaining Credit Card Information.....	7-31
Adding Credit Cards.....	7-31
Removing Credit Cards.....	7-32
Editing Credit Cards	7-32
Customer Contacts.....	7-32
Viewing a Customer's Order History.....	7-32
Marking Orders Delivered/Not Delivered.....	7-33
Customer Marketing.....	7-34
Customer Statement History.....	7-35
Wedding Accounts	7-35
Creating a Wedding Account/Charging Products to Account	7-36
Receiving Payments on Wedding Accounts.....	7-37
Paying Off the Balance on Wedding Accounts	7-38
Customer Merge	7-39
Merging Customer Accounts	7-40
Customer Merge Window	7-41
Customer Purge.....	7-42
Protecting Customers from Customer Purge.....	7-43
Deleting Individual Customers.....	7-44
Purge Customers Window.....	7-45
8: Product Maintenance	8-1
Product Codes	8-1
Using Product Codes in Order Entry and Point of Sale.....	8-2
Searching for Products	8-3
Product Search Window	8-3
Adding New Products	8-5

Adding Pictures to Products	8-6
Removing Pictures from Local Products	8-7
Product Recipes	8-7
Product Entry Window	8-8
Quick Picks	8-11
Copying Care Instructions	8-12
Deleting Products	8-12
Multiple Price Points	8-13
FTD Mercury & Your FOL Web Site	8-13
FOL Product Window	8-13
Adding Custom Products to Your FOL Web Site	8-17
Editing Custom Products on Your FOL Web Site	8-17
Removing Custom Products from Your FOL Web Site	8-17
Deactivating Custom Products on Your FOL Web Site	8-18
Changing the Price for Products on Your FOL Web Site	8-18
Gift Certificates	8-18
Setting Up Gift Certificates	8-19
Coupons	8-19
Setting Up Coupons	8-19
Delivery Zones and Fees	8-19
Bar Codes	8-20
Associating Bar Codes with Products	8-20
Deleting Associated Bar Codes	8-20
Bar Code Window	8-21
Wire Service Product Code List Window	8-21
9: Working with Orders	9-1
Point of Sale vs. Order Entry	9-1
Order Entry Window	9-3
Point of Sale Window	9-11
Navigating the Order Entry Window and Point of Sale Window	9-12
Entering Orders	9-12
Order Entry Anatomy	9-13
Filling Out the Order Entry or Point of Sale Window	9-14
Entering Carry Out Orders	9-16
Entering Orders for Pickup	9-17
Locating and Completing Pickup Orders	9-18
Entering Orders for Local Delivery	9-18
Entering Local Deliveries as C.O.D. Orders	9-19
Entering Wire Out Orders	9-20
Entering Phoned-Out Orders	9-21
Attaching Incoming Orders	9-22
Processing Incoming Wire Orders	9-23
Entering Phoned-In Orders	9-24
Entering Phoned-In Orders When You Know the Order Amount	9-24
Entering Phoned-In Orders Based on Products	9-25
Creating a Wire Out Order from an Incoming Florists Online or Flowers All Hours Order	9-26
Order Entry Wire Product	9-26

Canadian Tax Calculations for Incoming Wire and Phone Orders	9–27
Filing Incomplete Orders	9–28
Locating Filed Orders	9–28
Deleting Previously Filed Orders	9–29
C.O.D. Orders	9–29
Taking Order Payments	9–30
Debit Card Payments	9–31
Redeeming Gift Certificates	9–31
Redeeming Coupons	9–31
Payments Window	9–32
Transferring Orders to Other Stores	9–35
Using Abbreviation Codes in Orders	9–35
Caller ID and Orders	9–35
Gift Cards	9–36
Gift Cards Sales & Redemption	9–37
Selling New Gift Cards	9–37
Adding Value to Gift Cards	9–38
Refunding the Purchase of a Gift Card	9–39
Accepting Gift Card Payments	9–39
Cancelling or Refunding Orders Paid for with Gift Cards	9–40
Copying an Order with a Gift Card Payment	9–40
Issuing Store Credit with Gift Cards	9–40
Gift Card Reporting	9–41
Gift Card Activity Window	9–41
Tickets	9–42
Ticket Search Window	9–43
Searching for Tickets	9–47
Printing Ticket Search Results	9–47
Printing Invoices from Ticket Search	9–47
Opening Orders from Ticket Search	9–48
Copying Existing Tickets and Sales	9–48
Working with Tickets in Order Entry/Point of Sale	9–49
Handling Funerals	9–50
Opening the Funeral Log	9–50
Funeral Log Window	9–51
Adding Funerals to Funeral Log	9–52
Add Recipient Window	9–52
Using Funerals to Select Recipients	9–54
Changing Funeral Information	9–54
Generating Acknowledgement List Reports	9–54
Removing Funerals	9–55
Working with Recipient Pictures	9–55
Picture Center Window	9–55
Attaching Pictures to Tickets	9–58
Sending Product Pictures	9–58
Output Options Window	9–59
Standing Orders	9–60
Creating Standing Order Templates	9–61
Editing Existing Standing Order Templates	9–62
Deleting Existing Standing Order Templates	9–63

Deleting Upcoming Orders to be Generated by a Standing Order Template.....	9-63
Removing All Upcoming Orders Based on a Standing Order Template	9-63
Printing a List of Standing Order Templates	9-64
Order Entry Invoices	9-64
Printing Invoices to Remote Locations	9-70
Faxing and Emailing Invoices	9-70
Output Options Window	9-70
Delivery Confirmation	9-72
Required Configurations for Delivery Confirmation.....	9-73
Sending Delivery Confirmation Email Messages.....	9-73
Automatically Sending Delivery Confirmation ANS Messages.....	9-74
Marking Orders Delivered in Order Entry	9-74
Marking Orders as Delivered in Ticket Search.....	9-74
Processing Refunds & Exchanges	9-75
Refunds and Ticket Search	9-75
Refunding Entire Sales with One-Click Refunds.....	9-76
Refunding Single Tickets with One-Click Refunds	9-77
Partial Refunds of Sales with One-Click Refunds.....	9-77
Partial Refunds of Single Tickets with One-Click Refunds	9-78
Handling Exchanges with One-Click Refunds	9-78
New Sale-Based Refunds and Exchanges	9-79
Refunds and Wire Out Orders.....	9-79
Refund Window	9-80
Order Life Cycle	9-81
Order Life Cycle Messages	9-81
Additional Order Tasks & Windows.....	9-82
Copying Tickets in Order Entry and Point of Sale	9-82
Removing Individual Tickets from Sales	9-82
Using Bar Codes	9-83
Editing Existing Orders.....	9-83
Cancelling Orders	9-83
One-Off Printing.....	9-84
Editing an Order from History.....	9-85
Card Messages and Font Sizes	9-85
Sending a Card to Multiple Recipients	9-86
Ticket Status Window.....	9-86
Delivery Information Window.....	9-89
Map It Window	9-90
Cancel Confirmation Window.....	9-91
Multiple Recipients Window	9-91
Cancel or Void Order Window	9-92
Automated Order Interface	9-92
10: Automatic Order Processing (AOP)	10-1
Outgoing Order Handling by Automatic Order Processing	10-1
Credit Card Payments and Automatic Order Processing	10-2
Potential Issues that Prevent Automatic Order Processing.....	10-3
Automatic Order Processing Screen	10-3
Accessing the Automatic Order Processing Screen.....	10-4
Configuring Automatic Order Processing	10-5

Disabling Automatic Order Processing	10-5
Configuring AOP for Send-Only Florists	10-5
Florists Online and Flowers All Hours Product Codes	10-6
Automatic Order Processing and the System Employee	10-6

11: Managing Point of Sale Sessions..... 11-1

Point of Sale Sessions	11-1
Point of Sale Configurations	11-1
Setting Up the Cash Drawer	11-2
Setting Employee-Level Security	11-2
Setting Up Paid Out/In Types	11-2
Adding a Paid Out or Paid In Type	11-2
Removing an Existing Paid Out or Paid In Type	11-3
Renaming a Paid Out/In Type	11-3
Managing the Cash Drawer	11-3
Setting the Opening Balance	11-3
Opening Balance Window	11-4
Processing a No Sale Transaction	11-4
No Sale Window	11-5
Processing a Paid Out or Paid In Transaction	11-5
Paid Out/In Window	11-5
Z-Out Transactions	11-7
Point of Sale Session Scenarios for Z-Out Transactions	11-8
Processing a Z-Out Transaction	11-9
Z-Out Window	11-10
Money Counter Window	11-11
X-Out Transactions	11-12
Processing an X-Out Transaction	11-13
Point of Sale History	11-13
Opening Point of Sale History	11-13
POS Session History Window	11-13
Using the POS Session Detail	11-14
POS Session Detail Window	11-14
POS Manual Entry Window	11-16
POS Registration Window	11-16
Reprinting Receipts	11-17

12: Design Center 12-1

Opening the Design Center Window	12-1
Design Center Window	12-1
Assigning Products to Designers	12-4
Analyzing Designer Workloads	12-5
Designer Analysis Window	12-6
Marking Products Designed	12-7
Viewing Product Pictures and Recipes	12-8
Attaching Design Pictures to Tickets	12-8
Printing Invoices	12-9

13: Processing and Settling Credit Cards	13-1
FTD Cash-Flo™ Credit Card Program	13-1
Credit Cards over the Internet	13-1
Processing Credit Cards	13-2
The Approval Process	13-2
Changing the Price for a Credit Card Order Prior to Settlement	13-3
Voice Authorizing Credit Cards	13-3
Entering Voice Authorization Details for a Credit Card Transaction	13-3
Manually Authorizing Credit Card Transactions	13-4
Credit Card Authorization Window	13-5
View Credit Card Authorization Window	13-7
Searching for Credit Card Transactions	13-8
Viewing Credit Card Transactions from the Credit Card Search Window	13-8
Resending Credit Card Transactions from the Credit Card Search Window	13-8
Voice Authorizing Credit Card Transactions from the Credit Card Search Window	13-9
Deleting Unapproved Credit Card Transactions from the Credit Card Search Window	13-9
Credit Card Search Window	13-9
Credit Card Settlement	13-11
Credit Card Settlement Window	13-12
Handling Unsettled Credit Card Authorizations	13-12
Unsettled Credit Card Authorizations Window	13-13
View Settlement Totals Window	13-15
14: Mercury Delivery	14-1
Address Verification	14-1
Setting Up Address Verification	14-2
Using Address Verification	14-2
Updating the Address Verification Database	14-3
Mapping and Routing	14-4
Delivery Snapshot	14-5
Delivery Zones	14-7
Creating Zones by Map	14-7
Creating Zones by Postal Code	14-9
Creating Zones by Address	14-10
Removing Delivery Zones	14-11
Creating Delivery Routes	14-12
Step 1: Selecting Zones	14-12
Step 2: Adding Orders to the Delivery Route	14-14
Viewing Order Details (Products)	14-16
Changing the Delivery Path	14-18
Changing the Route Name or Origin	14-18
Changing an Order's Delivery Zone	14-19
Adding Additional Orders to the Route	14-21
Removing Orders from the Route	14-22
Step 3: Printing the Map	14-22
Step 4: Saving the Route	14-22
Editing Saved (Incomplete) Routes	14-23
Viewing Routing Progress	14-24
Viewing the Route Details (View Only)	14-25

Modifying a Delivery Route	14-27
Truck Return.	14-28
Handling Truck Returns	14-28
Follow Up Deliveries	14-30
Downloading Free Microsoft MapPoint Construction Updates	14-31
Wireless Delivery Confirmation	14-32
Setting Up Wireless Delivery Confirmation	14-32
Step 1: Set Up Delivery Codes	14-32
Step 2: Collect the Login Names of Your “Wireless” Employees	14-33
Step 3: Confirm the License Key is Valid	14-33
Step 4: Set Up Remote Delivery in Mercury Administration (Support Assisted)	14-34
Step 5: Create Wireless Employees on the Gearworks Web Site (Support Assisted)	14-34
Step 6: Set Up Your Phones on the Gearworks Web Site (Support Assisted)	14-36
Step 7: Activate Your Phones (Support Assisted)	14-38
Using Wireless Delivery Confirmation	14-39
Downloading the Route Information to the Phone	14-39
Receiving Orders on the Phone/Marking Orders Delivered	14-39
Completing a Route	14-40
Updating Your etrace Phone Software	14-40
GPS Upgrade	14-41
Tracking Phone Location (With No Orders Downloaded)	14-41
IVR	14-42
Setting Up IVR	14-43
Activating IVR (Support Assisted)	14-43
Completing Delivery Routes in Mercury Delivery for IVR	14-43
Calling In to Receive Orders/Marking Orders Delivered	14-44
Completing a Route from the Phone	14-44
Using Garmin GPS Devices with Mercury Delivery	14-45
Setting Your Home Location on the GPS Device	14-45
Removing Previous Routes from the GPS Device	14-46
Uploading Routes to the GPS Device	14-46
Accessing Routes on the GPS Device	14-47
Getting Directions to Your Home Location	14-48
Returning to Your Shop After a Delivery Route	14-48
Delivery Reports	14-48
Delivery Zone Report	14-48
Generating the Delivery Zone Report	14-49
Delivery Report	14-50
Delivery Report Window	14-50
Reprint Route Report	14-51
Generating the Reprint Route Report	14-51
Non Routed Orders Report	14-52
Generating the Non Routed Orders Report	14-52
Both Routed and Non Routed Orders Report	14-53
Generating the Both Routed and Non Routed Orders Report	14-54
Delivered Orders Report	14-55
Generating the Delivered Orders Report	14-56
Delivery Trip Analysis Report	14-56
Generating the Delivery Trip Analysis Report	14-57
Delivery Problem Report	14-57
Generating the Delivery Problem Report	14-58

Reference	14–58
Add Order Window	14–59
Add Zone Window	14–59
Complete Route Window	14–60
Create Zone Window	14–61
Optimize Route Options Window	14–62
Order Details Window	14–63
Redelivery Window	14–63
Rename Route Window	14–64
Route Origin Window	14–64
Routing Progress Window	14–65
Select Routing Progress Window	14–66
Select Saved Routes Window	14–67
Truck Stop Details Window	14–67

15: Mercury Marketing 15–1

Marketing Ideas	15–1
Marketing Letters	15–3
Printing Florist Thank You Letters	15–3
Florist Thank You Letter	15–4
Printing Order Recipient Discount Letters	15–4
Recipient Discount Letter	15–5
Printing Mailing Labels	15–6
Printing Occasion Code Letters	15–8
Occasion Code Letter	15–9
Creating Customer Letters	15–10
Printing Delinquency Letters	15–11
Delinquency Letter	15–12
Modifying Letter Templates	15–13
Marketing Categories	15–14
Assigning Marketing Categories to Customers	15–15
Using Customer Categories in Reports	15–15

16: Mercury Marketing Module 16–1

Launching the Mercury Marketing Module	16–1
Marketing Campaigns	16–2
Creating Direct Mail Marketing Campaigns	16–3
Creating Direct Mail Marketing Campaigns Using Predefined Templates	16–3
Creating Direct Mail Marketing Campaigns Using Custom Templates	16–5
Creating a Birthday Reminder Direct Mail Campaign	16–5
Creating a New Holiday Reminder Direct Mail Campaign	16–6
Creating Other (Third-Party) Marketing Campaigns	16–7
Scheduling Campaigns	16–9
Campaign Analysis	16–10
Deleting Campaigns	16–10
Templates	16–11
Modifying an Existing Template	16–11
Creating a New Template	16–11
Creating a Single Postcard Template	16–13

Email Marketing Campaigns	16–13
Creating Email Campaigns in the Marketing Wizard	16–13
Executing Your Email Marketing Campaign on the Constant Contact Web Site	16–15
Guidelines for Developing Email Campaign Messages	16–15
Creating a List of Customer Email Addresses	16–16
Mercury Marketing Wizard Reference	16–17
Welcome Panel	16–17
Create Campaign Panel	16–18
All Campaigns Window	16–20
Add New Referral Code Window	16–20
Campaign Analysis Window	16–21
Select Target List Panel	16–22
Key Criteria Panel	16–23
Output Fields Panel	16–25
Preview and Edit List Panel	16–26
Selected Criteria Window	16–27
Save Campaign Panel	16–28
Campaign Scheduler Window	16–31
All Criteria Window	16–32
17: Wire Service Reconciliation	17–1
Automatic Reconciliation	17–1
Automatically Reconciling Data	17–2
Auto Reconciliation History Window	17–2
Load Reconciliation File Window	17–3
Match Reconciliation Window	17–3
Manual Reconciliation	17–4
Manual Reconciliation Window	17–5
Manual Wire Reconciliation Filter Window	17–5
Reconcile Detail Window	17–6
Editing Previous Wire Reconciliation Batches	17–6
18: Accounts Receivable	18–1
Billing Functions	18–1
Establishing House Accounts	18–1
Receiving Payments on House Accounts	18–2
Receiving Payments in Point of Sale	18–2
Receiving Payment from the FTD Mercury Main Menu	18–4
Receive Customer Payment On Account Window	18–5
Allocating Previous Payments	18–7
Canceling Payments	18–7
Statements	18–8
Required Setups for Faxing and Emailing Statements	18–9
Collecting Customers' Email/Fax Information	18–10
Selecting a Customer's Preferred Billing Method (Email, Fax, or Printed Statement)	18–10
Generating Statements	18–12
Generating Invoices	18–15
Generate Statements Window	18–15
Finance Charge Window	18–17
Output Statements Window	18–17

Generating Statements in Statement Search.....	18–19
Validating that Statements Were Emailed or Faxed.....	18–19
Re-Printing/Re-Faxing/Re-Emailing Statements	18–19
Searching for Statements.....	18–20
Statement Search Window	18–21
View Statements Window	18–22
Order Entry Item Window.....	18–22
Credit/Debit Memo Window.....	18–23
Credit and Debit Memos	18–25
Creating Credit Memos.....	18–25
Creating Debit Memos.....	18–25

19: Business Reports 19–1

Using Business Report Templates.....	19–1
List of Business Reports	19–2
Abbreviated Customer Master List with Balance Report	19–3
Generating the Abbreviated Customer Master List with Balance Report	19–3
Abbreviated Customer Master List Window	19–4
Abbreviated Customer Master List with Days Late Report	19–5
Generating the Abbreviated Customer Master List with Days Late.....	19–6
Aged Analysis Reports	19–7
Generating Aged Analysis Reports.....	19–9
Aged Analysis Report Window.....	19–10
Business Snapshot Report	19–11
Sales Analysis.....	19–11
Delivery Analysis.....	19–13
Product Analysis.....	19–13
Wire Analysis	19–15
Generating the Business Snapshot Report	19–15
Business Snapshot Window.....	19–16
Credit Card Settlement History Report	19–16
Generating the Credit Card Settlement History Report	19–16
Credit Card Settlement History Window	19–18
Customer Account Payment Report	19–19
Generating the Customer Account Payment Report.....	19–19
Customer Account Payments Window.....	19–21
Customer Master List	19–22
Generating the Customer Master List	19–23
Customer Master List Window	19–24
Employee Analysis Report	19–25
Generating the Employee Analysis Report	19–28
Employee Production Report Window	19–29
Employee Sales Report	19–30
Generating the Employee Sales Report	19–30
Employee Sales Report Window	19–31
Message Report	19–31
Generating the Message Report	19–32
Message Report Window	19–32
Payment Type Totals Report	19–33

Generating the Payment Type Totals Report	19–33
Payment Type Totals Window	19–33
Product Comparison Report	19–34
Generating a Product Comparison Report	19–35
Product Comparison Report Window	19–36
Product Sales Reports	19–37
Generating Product Sales Reports.....	19–42
Product Sales Report Window	19–42
Reciprocity Report	19–43
Generating a Reciprocity Report	19–43
Reciprocity Report Window.....	19–44
Report of Orders Filled.....	19–44
Generating the Report of Orders Filled.....	19–45
Report of Orders Filled Window.....	19–45
Sales by Referral Code Report.....	19–46
Generating the Sales by Referral Code Report.....	19–48
Sales by Referral Code Report Window.....	19–49
Sales Summary Report.....	19–50
Order Entry/Manual, POS, and Total Sales	19–50
Other Section.....	19–54
Store Transfer Section	19–54
Generating the Sales Summary Report.....	19–55
Sales Summary Report Window.....	19–55
Sales Tax Report	19–56
Generating the U.S. Sales Tax Report	19–58
Generating the Canadian Sales Tax Report	19–59
Sales Tax Report Window	19–59
Canadian Sales Tax Window	19–60
Standing Order Log Detail Report.....	19–62
Generating a Standing Order Log Detail Report	19–63
Standing Order Report Window	19–63
Standing Order Log Summary Report.....	19–64
Generating a Standing Order Log Summary Report	19–66
Tax Exempt Customer Report.....	19–66
Generating the Tax Exempt Customer Report.....	19–67
Tax Exempt Report Window	19–67
Ticket Report	19–68
Generating a Ticket Report.....	19–69
Ticket Report Window	19–69
Wire Reconciliation Report.....	19–70
Generating the Wire Reconciliation Report.....	19–71
Wire Reconciliation Window	19–72
Wire Service Incoming/Outgoing Report.....	19–73
Generating the Wire Service Incoming/Outgoing Report.....	19–74
Wire Service Incoming/Outgoing Window	19–74

20: Accounting Application and QuickBooks Integration **20–1**

Accounting Module Main Menu	20–1
If You Are Already Using QuickBooks.....	20–2

Exporting and Importing Lists from Previous QuickBooks Companies	20-3
Setting Up QuickBooks	20-4
Step 1: Confirm the License Key is Valid	20-5
Step 2: Install QuickBooks (New Customers Only—Existing Customers Skip to Step 3)	20-5
Step 3: Open QuickBooks and Activate the Software	20-5
Step 4: Set Up Your Chart of Accounts	20-6
The Chart of Accounts Wizard	20-6
Setting Up Your Chart of Accounts	20-7
About Your Chart of Accounts	20-12
Journal Entries for Outgoing Wire Orders	20-12
Journal Entries for Store Transfers	20-12
Step 5: Enter Your Company Information in QuickBooks	20-13
Step 6: Enter Your Opening Balances	20-14
The Balance Wizard (Exporting to QuickBooks)	20-15
General Ledger Export History	20-23
Using QuickBooks	20-24
Changing Company Information	20-24
Adding Accounts to the Chart of Accounts	20-25
Reconciling Accounts to Bank Statements	20-27
Printing Cost of Goods Reports	20-27
Printing Trial Balance Reports	20-30

21: Legacy General Ledger Module **21-1**

Setting Up Your System for General Ledger Export	21-1
Step 1: Creating GL Account Numbers in Third-Party Accounting Software	21-1
Step 2: Setting Up Your Third-Party Software	21-2
Step 3: Assigning GL Account Numbers to Products	21-3
Step 4: Creating GL Export Defaults	21-4
General Ledger Export Window	21-4
Exporting the General Ledger File	21-4
General Ledger Export History Window	21-5

22: Fax and Email **22-1**

Fax & Email Monitor Application	22-1
Fax Tab	22-2
Email Tab	22-2
Scheduler Tab	22-3
Logging Into the Fax and Email Monitor Application	22-4
Manually Deleting Email Messages and Faxes	22-4
Resending a Fax	22-4
Resending an Email Message	22-4
Rescheduling Jobs	22-4

23: FTD Document Center **23-1**

Opening the FTD Document Center	23-1
Creating a New Template	23-1
Create a New Template Window	23-2
Opening an Existing Template	23-3

Customizing Templates	23–3
Adding Components to Your Template	23–3
Sample Template with Components	23–4
Changing Component Order	23–4
Template Components	23–5
Changing Component Properties	23–7
Inserting Merge Fields	23–7
Saving the Template	23–8
Exiting the FTD Document Center	23–8

24: Mercury Administration **24–1**

Mercury Administration Interface	24–1
Navigation	24–1
Toolbars	24–2
Resources for Help	24–2
Logging into Mercury Administration	24–3
Accounting Folder	24–3
HouseAccount Screen	24–3
Accessing the HouseAccount Screen	24–6
Setting Up House Account Defaults	24–6
Dunning Message Screen	24–6
Accessing the Dunning Message Screen	24–8
Configuring Dunning Messages	24–8
Questions Screen	24–8
Accessing the Questions Screen	24–9
Adding User Questions	24–9
Credit Cards Screen	24–9
Accessing the Credit Cards Screen	24–11
Configuring Credit Card and Gift Card Processing over the Internet	24–11
Configuring Credit Card Processing Using Dial Up Access	24–12
Maintaining Your Credit Card over the Internet Account	24–12
Setting the Gift Card Expiration Period	24–13
Debit Cards Screen	24–13
Accessing the Debit Cards Screen	24–14
Configuring Debit Cards Screen Settings	24–14
Tax Code Screen	24–14
Accessing the Tax Code Screen	24–16
Configuring Tax Codes	24–16
Typical Tax Codes	24–17
GL Export Screen	24–17
Accessing the GL Export Screen	24–18
Configuring GL Export Options	24–19
POS Setting Screen	24–20
Accessing the POS Setting Screen	24–20
Configuring POS Settings	24–21
Marketing Screen	24–21
Accessing the Marketing Screen	24–22
Adding Marketing Categories	24–22
Removing Marketing Categories	24–22
Removing Marketing Types	24–22
Store Transfers Screen	24–22

Accessing the Store Transfers Screen	24–23
Enabling Store Transfers	24–24
Enabling Accounting for Store Transfers	24–24
Communication Folder	24–24
Email Screen	24–25
Accessing the Email Screen	24–27
Configuring Email Settings	24–27
Fax Screen	24–28
Accessing the Fax Screen	24–29
Configuring Fax Settings	24–29
Editing/Creating Fax Cover Letters	24–29
Internet Screen	24–30
Accessing the Internet Screen	24–31
MailServer Screen	24–31
Accessing the MailServer Screen	24–34
Mercury Connection Screen	24–35
Accessing the Mercury Connection Screen	24–36
Phone Lines Screen	24–37
Accessing the Phone Lines Screen	24–38
Remote Delivery Screen	24–38
Accessing the Remote Delivery Screen	24–40
Delivery Folder	24–40
Delivery Code Screen	24–40
Accessing the Delivery Code Screen	24–41
Adding Delivery Codes	24–42
Delivery Priority Code Screen	24–42
Accessing the Delivery Priority Code Screen	24–43
Adding Delivery Priority Codes	24–43
Delivery Zone Screen	24–43
Accessing the Delivery Zone Screen	24–46
Setting Up Delivery Zones in Mercury Administration	24–47
Creating Pickup Zones	24–47
Handling Existing Pickup Zones	24–47
Marking Delivery Zones as Inactive	24–47
Removing Existing Delivery Zones	24–48
Province Map Delivery Zones	24–48
Pool Delivery Zones	24–48
Configuring Pool Zones	24–49
Pool Address Window	24–49
Delivery Zone Fees Screen	24–49
Accessing the Delivery Zone Fees Screen	24–50
Assigning Fees to Delivery Zones	24–50
Removing Fees from Delivery Zones	24–50
Address Verification Screen	24–51
Accessing the Address Verification Screen	24–51
Employee Folder	24–51
Employees Screen	24–51
Accessing the Employees Screen	24–53
Employee Type Screen	24–53
Accessing the Employee Type Screen	24–54
Job Functions Screen	24–54
Accessing the Job Functions Screen	24–55

Security Folder	24–55
License Screen	24–55
Accessing the License Screen.....	24–56
Adding Licenses.....	24–56
Window Access Screen	24–57
Accessing the Window Access Screen	24–57
Store Folder	24–58
General Screen	24–58
Accessing the General Screen	24–59
Configuring General Settings.....	24–60
Wire Code Screen	24–60
Accessing the Wire Code Screen.....	24–60
Adding Wire Codes.....	24–61
Removing Wire Codes.....	24–61
Setting Your Default Shop Code.....	24–61
Store Settings Screen	24–61
Accessing the Store Settings Screen	24–63
Changing the Store Name.....	24–63
Changing the Store Address.....	24–63
Adding Stores.....	24–64
Setting the Default Tax Code	24–64
Setting the Default Delivery Zone.....	24–64
Setting the GST ID Number.....	24–64
Changing the U.S. Exchange Rate.....	24–65
Changing the Default Card Font.....	24–65
System Folder	24–65
Abbreviation Codes Screen	24–65
Using Abbreviation Codes	24–67
Accessing the Abbreviation Codes Screen	24–68
Adding Abbreviation Codes	24–68
Modifying Existing Abbreviation Codes.....	24–69
Removing Abbreviation Codes	24–69
Address Types Screen	24–69
Accessing the Address Types Screen.....	24–70
Adding an Address Type.....	24–70
Removing Existing Address Types	24–70
Reason Code Screen.....	24–70
Accessing the Reason Code Screen.....	24–71
Adding Reason Codes	24–71
Removing Reason Codes	24–72
Product Category Screen	24–72
Accessing the Product Category Screen	24–73
Adding Product Categories.....	24–73
Removing Product Categories.....	24–73
Referral Codes Screen	24–73
Accessing the Referral Codes Screen.....	24–74
Adding Referral Codes.....	24–74
Removing Referral Codes.....	24–74
Phone Types Screen	24–75
Accessing the Phone Types Screen	24–75
Adding Phone Types	24–76
Removing Existing Phone Types.....	24–76

Paid Out/In Types Screen	24-76
Accessing the Paid Out/In Types Screen	24-77
Advanced Settings Screen	24-77
Accessing the Advanced Settings Screen	24-78
Printer Settings Folder	24-78
Form Alignment Screen	24-78
Accessing the Form Alignment Screen	24-80
Configuring Form Alignment Settings	24-80
Printer Routing Screen	24-80
Accessing the Printer Routing Screen	24-81
Changing Printer Routing Options	24-82
Default Form Printing Screen	24-82
Accessing the Default Form Printing Screen	24-83
Configuring Forms to Print	24-83
Form Format Screen	24-83
Billing Invoice (Letter)	24-84
Billing Invoice (Legal)	24-85
Working Invoice (Letter)	24-87
Working Invoice (Legal)	24-88
TriFold Card	24-89
Accessing the Form Format Screen	24-90
Configuring Information to Print in Forms	24-90
Wire Service Folder	24-91
WireServices Screen	24-91
Accessing the WireServices Screen	24-92
Updating the Florist Directory	24-93
Setting the Current Exchange Rate	24-93
Setting the Conversion Chart Multiplier	24-93
Allocating Wire Service Percentages	24-94
CurrencySettings Screen	24-94
Accessing the CurrencySettings Screen	24-95
Adding a Non-Directory Florist	24-95
Removing Non-Directory Florists	24-96
Automatic Order Processing Screen	24-96
Accessing the Automatic Order Processing Screen	24-97
Exiting Mercury Administration	24-97

25: Dashboard 25-1

Enabling Dashboard	25-2
Enabling Dashboard in Mercury Administration	25-2
Configuring Terminals to Display the Dashboard	25-2
Opening Dashboard	25-2
Dashboard Information	25-3
Incoming Mercury Messages Chart	25-4
Order Indicators	25-5
Pickup Orders	25-5
C.O.D. Orders	25-5
Declined Credit Cards	25-6
Unauthorized Credit Cards	25-6
Undelivered Orders	25-7
Incomplete Orders	25-7

Filed Orders	25–8
Communication Status Indicators.....	25–8
External Communication	25–8
Mercury Connection.....	25–9
Backup Status	25–9
26: Multi-Store Capabilities	26–1
Adding New Stores to Multi-Store Environments.....	26–1
Employees and Multiple Stores	26–1
Customers and Multiple Stores	26–1
Statements in Multi-Store Environments.....	26–2
Order Entry/Point of Sale	26–3
Ticket Search	26–4
Product Codes and Product Search	26–4
Wire Service Reconciliation	26–5
Reports.....	26–5
Remote Location Printing.....	26–5
27: Web Order Interface	27–1
How the Web Order Interface Works.....	27–1
Requirements for Your Web Site	27–1
Setting Up the Web Order Interface.....	27–2
Before You Begin	27–2
Step 1: Confirm that the License Key is Valid	27–2
Step 2: Set Up Your Mail Server Information in Mercury Administration.....	27–2
How Messages are Retrieved from Your Email Account	27–3
Processing Web Orders in FTD Mercury.....	27–3
Web Order Interface Web Site Requirements.....	27–4
General Requirements.....	27–4
Field Requirements.....	27–5
Other Formatting Considerations	27–8
Encryption	27–9
A: Credit Card Authorization Codes	A–1
B: State and Province Abbreviations	B–1
C: Canadian Configurations.....	C–1
Set the Store to Canada	C–1
Set and Verify Tax Codes.....	C–2
Set Federal and Provincial Tax Code Labels.....	C–2
Set Federal and Provincial Tax Rates	C–3
Add and Modify Tax Codes	C–4
Configure Store Settings.....	C–7
Configure Wire Service Exchange Rate and Fill Order Multiplier.....	C–8
Configure and Update Delivery Zones	C–9
Tax Hierarchy.....	C–9

Remove Tax Codes on Products	C-9
Create Provincial Delivery Zones for Outgoing Orders	C-10
Create Local Zones and Edit Provincial Zones	C-12
Associate Delivery Zone Fees	C-15
Configure Local Tax Rates for Product Fees and Charges	C-16
Taxation of Incoming Orders	C-18
D: Debit Cards.....	D-1
Configuring Canadian Systems for Debit Card Transactions	D-1
Using Debit Cards on Canadian Systems	D-2
Debit Card Payments in Point of Sale	D-3
Debit Card Payments in Order Entry	D-3
Splitting Payments	D-3
Debit Card Refunds.....	D-3
Reversal File	D-4
Accounting Balance Report in Detail.....	D-4
Approval and Declined Responses.....	D-4
E: Bar Code Reader Configuration.....	E-1
G: Glossary.....	G-1
I: Index	I-1