

Basic Operations

This section is designed to get you started and help you set up FTD Mercury. You should read this section after you have installed your hardware. The following areas are covered:

- » Starting and exiting FTD Mercury
- » Getting to know FTD Mercury, including the FTD Mercury working environment and system navigation
- » Setting up your printers
- » Setting up your employees and passwords
- » Backing up your data
- » Performing daily, weekly, and monthly procedures

IMPORTANT For instructions on using the Store Setup Wizard (Configuration Wizard) that appears when you turn on your computer for the first time, please refer to the out-of-box instructions that were shipped with FTD Mercury.

Navigation

If you are a new Windows user, this section may help you adjust to your new system. Following are descriptions of mouse and keyboard navigation methods.

Mouse Navigation

Your mouse is used to select items on the screen. Throughout this reference guide, you are instructed to click, double-click, or right-click items. To click is to press and release your left mouse button one time quickly. To double-click is to click your left mouse button twice quickly. To right-click is to push and release the right mouse button once quickly.

Keyboard Navigation

Table 2-1: Keyboard Navigation

Key	Use
Tab	The TAB key is used to move your cursor from field to field. If you are a new Windows user, the TAB key most likely replaces the Enter key in previous programs you have used.
Shift+Tab	Pressing the SHIFT and TAB keys simultaneously moves your cursor back one field.
F1	Pressing the F1 key while working in FTD Mercury displays a help page.
Ctrl+F1	Pressing the CTRL key and the F1 key simultaneously displays help for a particular field (when your cursor is in that field).
Ctrl+Tab	Pressing the CTRL key and the TAB key simultaneously moves you to the next tab in the window (if you are in a window that has tabs).
Alt+letter	Pressing the ALT key then the underlined letter on a menu, button, etc., activates the function on the menu, button, etc.
Esc	The ESC key brings you back one screen.

FTDStartup and FTDSHUTDOWN

FTDStartup

When you restart your computer, the computer automatically runs FTDStartup, which starts all of your FTD Mercury services. These include FTD Mercury, communications software (CommPool), and FTD Reporter (the program that allows you to print from FTD Mercury). Icons for each of these services display in the system tray in your Windows taskbar.

You only have to run FTDStartup manually if you shut down your services using an FTD Shutdown.

TASK **To perform an FTD Startup:**

On the **Windows Start** menu, point to **All Programs**, point to **FTD Software**, and click **FTDStartup**.

If you ever receive the message Unable to connect to the host server on the server PC or any of your client PCs, this means that the FTD Mercury services are not running on your server and you need to perform an FTDStartup.

FTDSHUTDOWN

FTDSHUTDOWN shuts down all of your FTD Mercury services, including the software, the CommPool (communications) and FTD Reporter (the program that is required to print from the FTD Mercury software). You should not run an FTDSHUTDOWN unless you are instructed to do so by FTD (for example, as part of an installation procedure). You are not able to use the software or send and receive messages if you perform an FTD Shutdown. After you perform an FTD Shutdown, you must perform an FTDStartup to start all of the services again.

TASK **To perform an FTDSHUTDOWN:**

On the **Windows Start** menu, point to **All Programs**, point to **FTD Software**, and click **FTDSHUTDOWN**.

Logging In

NOTE If you are starting FTD Mercury for the first time, the System Login window appears automatically after you complete the Store Setup Wizard.

TASK **To log in to FTD Mercury:**

- 1 Double-click on the **FTD Mercury** icon on your desktop. The **System Login** window opens.
- 2 In the **Login Name** field, type your login name and press **Tab**. If you are logging in for the first time, type admin as the login name.
- 3 In the **Password** field, type your password. If you are logging in for the first time, type admin as the password. Asterisks (*****) appear to protect your password.
- 4 By default, your store name appears in the **Store Name** field. If you have multiple stores, click the arrow and select the name of the store for which you want to log in.
- 5 Click **Login**.

If you are logging in for the first time, you may continue to use this login name and password until you assign yourself and each of your employees a login name and password in the system. For information on assigning passwords, see [Employee Folder](#) on page 24–51 for details.

IMPORTANT If you receive the message Unable to connect to the host server, you need to perform an FTDDStartup procedure. See [FTDDStartup and FTDDShutdown](#) on page 2–2 for details.

System Login Window

When you first launch FTD Mercury, the System Login window appears. You must enter your login name and password for the selected store in order to start using FTD Mercury.

Connection Error Window

The Connection Error window displays when your computer cannot connect to the server. If you are working on a terminal that is connected to a main terminal, make sure that the main terminal is connected.

Allow the program a few moments to try to connect to the server. If the program cannot connect, call FTD Mercury support at 1-888-681-7911 for assistance.

Setting the Date and Time

After you have installed and started up your system, check the time that displays in the lower right-hand corner of your computer screen. The time must be correct so FTD Mercury can display the correct time when sending and receiving messages. If the time does not display correctly, you should set it.

TASK **To set the date and time:**

- 1 Double-click on the time displayed in the lower right corner of your screen.
- 2 When the **Date and Time Properties** window opens, click the select the current month.
- 3 Click the up and down arrows with your mouse to change the year to the current year.
- 4 In the right side of the window, select the hour indicator with your mouse and use the up and down arrows to set the hour. Repeat this procedure to set the minute, second, and AM/PM indicators.
- 5 Click the **Time Zone** tab. Click the down arrow and select the time zone in which your store is located.

- 6 Click the check box at the bottom of the window to ensure the computer will automatically adjust its clock for daylight saving changes.
- 7 Click OK.

FTD Mercury Main Menu Window

After you log in to FTD Mercury, the FTD Mercury Main Menu opens. This is the hub for all FTD Mercury functionality.

Figure 2-1: FTD Mercury Main Menu



The FTD Mercury Main Menu has four button groupings, organized to help you access the most common commands quickly. The full suite of commands is available from the menu bar.

Main Functionality Functions

At the front center of the FTD Mercury Main Menu are six buttons corresponding to extremely common commands in FTD Mercury.

Table 2-2: Main Buttons

Command	Description
Order Entry	Opens the Order Entry window. You can also access this button by pressing O .
Point of Sale	Opens the Point of Sale window. You can also access this button by pressing P .
What's New	Launches the What's New PDF.
Designer	Opens the Design Center window. You can also access this button by pressing G .

Table 2-2: Main Buttons (cont.)

Command	Description
Delivery	Opens Mercury Delivery. You can also access this button by pressing D .
Marketing	Opens Mercury Marketing. You can also access this button by pressing K .

Bookkeeping Functions

At the bottom center of the FTD Mercury Main Menu, five buttons relating to bookkeeping functions are grouped together.

Table 2-3: Bookkeeping Buttons

Command	Description
Receive Payment	Opens the Receive Customer Payment On Account window. You can also access this button by pressing Y .
Accounting	Opens Mercury Accounting. You can also access this button by pressing A .
Credit Cards	Opens the Unsettled Credit Card Authorizations window. You can also access this button by pressing C .
Statements	Opens the Generate Statements window. You can also access this button by pressing S .
Business Reports	Opens an Explorer window to the Office Templates folder. You can then open the Mercury Forms folder and select the report you want to generate. You can also access this button by pressing B .

Search Functions

At the top right of the FTD Mercury Main Menu, five search buttons are available. You can quickly execute any of these searches by pressing the number key corresponding to that search.

Table 2-4: Search Buttons

Command	Description
Ticket	Opens the Ticket Search window and automatically searches for tickets from today's date and before. You can also access this button by pressing 1 .
Message	Opens Message Center and automatically searches for all messages that require attention. You can also access this button by pressing 2 .
Florist	Opens the Florist Search window. You can also access this button by pressing 3 .
Customer	Opens the Customer Search window. You can also access this button by pressing 4 .
Product	Opens the Product Search window. You can also access this button by pressing 5 .

Other Functions

At the bottom left of the FTD Mercury Main Menu, there are two additional buttons (you can see the name of each button by hovering over the button with the mouse). These are less commonly used commands than others on the FTD Mercury Main Menu, but still tremendously valuable.

Table 2-5: Other Buttons

Button	Description
Transmit Now	Initiates a send and receive command with the Mercury Network. Normally, messages are sent every few minutes, but this command forces the send and receive to occur now.
Merc Tech U	Opens an Internet Explorer browser window to the Merc Tech U Web site. This Web site contains information about FTD Mercury, including documentation, tips & tricks, and breaking news.

Menu Bar

At the top of the FTD Mercury Main Menu is a menu bar. The commands under each menu provide access to FTD Mercury's features and functionality.

File Menu

The File menu consists of the following commands:

Table 2-6: File Menu Commands

Command	Description
Logout	Logs the current user out of FTD Mercury, closes the FTD Mercury Main Menu, and opens the System Login window.
New Customer	Opens the Customer Detail Information window, from which you can add a new customer to your FTD Mercury database.
New Product	Opens the Product Entry window, from which you can add a new product to your FTD Mercury databases.
Order Entry	Opens the Order Entry window. This command corresponds to the Order Entry button on the FTD Mercury Main Menu.
Point of Sale	Opens the Point of Sale window. This command corresponds to the Point of Sale button on the FTD Mercury Main Menu.
Exit	Closes FTD Mercury.

Search Menu

The Search menu consists of the following commands:

Table 2-7: Search Menu Commands

Command	Description
Ticket Search	Opens the Ticket Search window and automatically performs a search for tickets from today's date and before. This command corresponds to the Ticket Search button on the FTD Mercury Main Menu.
Message Search	Opens the Message Center and automatically performs a search for messages that require your attention. This command corresponds to the Message Search button on the FTD Mercury Main Menu.
Florist Search	Opens the Florist Search window. This command corresponds to the Florist Search button on the FTD Mercury Main Menu.
Customer Search	Opens the Customer Search window. This command corresponds to the Customer Search button on the FTD Mercury Main Menu.
Product Search	Opens the Product Search window. This command corresponds to the Product Search button on the FTD Mercury Main Menu.
Facility Search	Opens the Facility Search window.
Employee Search	Opens the Employee Search window.
Statement Search	Opens the Statement Search window.
Credit Card Search	Opens the Credit Card Search window.

Mercury Message Menu

The Mercury Message menu consists of the following commands:

Table 2-8: Mercury Message Menu Commands

Command	Description
Ask (ASK)	Opens the Create ASK Message window.
Answer (ANS)	Opens the Create ANS Message window.
Cancel (CAN)	Opens the Create CAN Message window.
Confirm (CON)	Opens the Create CON Message window.
Delivery Confirmation (ANS)	Opens the Delivery Confirmation (ANS) Message window.
Deny (DEN)	Opens the Create DEN Message window.
Forward (FOR)	Opens the Create FOR Message window.
Reject (REJ)	Opens the Create REJ Message window.
General (GEN)	Opens the General Message Detail window.

Table 2-8: Mercury Message Menu Commands (cont.)

Command	Description
Adjust (ADJ)	Opens the Adjustment Message (ADJ) window.
Rec Message List (REC)	Opens the REC Message List window.
Resume (RES)	Opens the Resume Message (RES) window.
Retrieval (RET)	Opens the Retrieval Message (RET) window.
Suspend (SUS)	Opens the Suspend Message (SUS) window.
Transmit Now	<p>Initiates a send and receive command with the Mercury Network. Normally, messages are sent every few minutes, but this command forces the send and receive to occur now.</p> <p>This command corresponds to the Transmit Now button on the FTD Mercury Main Menu.</p>

Management Menu

The Management menu consists of the following commands:

Table 2-9: Management Menu Commands

Command	Description
Employee History	Opens the Employee History Information window.
Employee Sales Summary	Opens the Employee Sales Summary window.
Reports and Templates	<p>Opens an Explorer window to the Office Templates folder. You can then open the Mercury Forms folder and select the report you want to generate.</p> <p>This command corresponds to the Business Reports button on the FTD Mercury Main Menu.</p>
Gift Card Activity	Opens the Gift Card Activity window.
Credit/Debit Memo	Opens the Credit/Debit Memo window.
POS Sales Entry	Opens the POS Sales Entry window.
POS Session History	Opens the POS Session History window.
Generate Statements	<p>Opens the Generate Statements window.</p> <p>This command corresponds to the Statements button on the FTD Mercury Main Menu.</p>
Receive Payment	<p>Opens the Receive Customer Payment On Account window.</p> <p>This command corresponds to the Receive Payment button on the FTD Mercury Main Menu.</p>
Accounting	<p>Opens Mercury Accounting.</p> <p>This command corresponds to the Accounting button on the FTD Mercury Main Menu.</p>
General Ledger Export	Opens the General Ledger Export window.
GL Export History	Opens the General Ledger Export History window.

Credit Cards Menu

The Credit Cards menu consists of the following commands:

Table 2-10: Credit Cards Menu Commands

Command	Description
Settlement	Opens the Credit Card Settlement window.
Voice/Resend Authorization	Opens the Unsettled Credit Card Authorizations window with the View Unapproved parameter selected.
View Unsettled Authorizations	Opens the Unsettled Credit Card Authorizations window with the View Approved parameter selected. This command corresponds to the Credit Cards button on the FTD Mercury Main Menu.
Manual Authorization	Opens the Credit Card Authorization window.

Wire Reconciliation Menu

The Wire Reconciliation menu consists of the following commands:

Table 2-11: Wire Reconciliation Menu Commands

Command	Description
Load Wire Reconciliation	Opens the Load Reconciliation File window, allowing you to perform wire reconciliation automatically.
Manual Wire Reconciliation	Opens the Manual Wire Reconciliation Filter window, allowing you to filter your manual reconciliation data.
Auto Reconciliation History	Opens the Auto Reconciliation History window.

Tools Menu

The Tools menu consists of the following commands:

Table 2-12: Tools Menu Commands

Command	Description
Designer	Opens the Designer Assignments window (also known as the Designer or Design Center). This command corresponds to the Designer button on the FTD Mercury Main Menu.
Delivery	Opens Mercury Delivery. This command corresponds to the Delivery button on the FTD Mercury Main Menu.
Marketing	Opens Mercury Marketing. This command corresponds to the Marketing button on the FTD Mercury Main Menu.
Fax and Email Monitor	Opens the Fax and Email Monitor window.
Doc Center	Opens the FTD Document Center.

Table 2-12: Tools Menu Commands (cont.)

Command	Description
Merge Customers	Opens the Customer Merge window, from which you can merge duplicate customer accounts into a single account.
Purge Customers	Opens the Purge Customers window, from which you can purge inactive customers from your FTD Mercury database.
Settings	Opens the FTD Mercury Configuration window.
Printer Form Settings	Opens the Printer Form Settings window.
Change Password	Opens the FTD Mercury Server Password window, allowing you to change your password.
Reset POS Client Configuration	Unregisters this computer as a Point of Sale client. Do not use this command unless directed to by someone from the Mercury Technology Assistance Center.
Mercury Administration	Opens Mercury Administration, from which you can change many global configurations for FTD Mercury.

Help Menu

The Help menu consists of the following commands:

Table 2-13: Help Menu Commands

Command	Description
Contents	Launches FTD Mercury online help.
Merc Tech U	Opens an Internet Explorer browser window to the Merc Tech U Web site. This Web site contains information about FTD Mercury, including documentation, tips & tricks, and breaking news. This command corresponds to the Mec Tech U button on the FTD Mercury Main Menu.
License Agreement	Opens the Software License window and displays the FTD Mercury license agreement.
About FTD Mercury	Opens the About window and displays information about the FTD Mercury version and other associated software information.

Using the FTD Mercury Main Menu

The FTD Mercury Main Menu is keyboard accessible. You can press the Tab key on your keyboard to move between the buttons. When a button has focus, it is highlighted in yellow. When you press the Enter key on your keyboard, the currently selected button activates the same as if you clicked it with your mouse.

Additionally, buttons on the FTD Mercury Main Menu have keyboard shortcuts. The shortcut is the underlined letter in the button name. When you press the corresponding key on your keyboard, the button activates. For example, if you press the R key on your keyboard, the Order Entry window opens. For the searches, press the number (displayed in the magnifying glass in the icon).

If you want to access menu bar commands, press the Alt key and the underlined key simultaneously to open the menu. You can then either use the arrow keys to move up and down the menu, or press the underlined key for the command you want to access. For example, if you wanted to open the FTD Mercury Configuration window (accessible from the Settings command under the Tools menu), you could press **ALT+L** and then press **s**.

Exiting FTD Mercury

If you want to exit FTD Mercury, you may do so by clicking Exit on the File menu. Keep in mind that you may minimize the program instead by clicking the minimize button in the upper-right corner of the window. At the end of the day, there is no need to exit the program or turn off the computer.

Address Check Window

The **Address Check** window appears if FTD Mercury does not understand the address that you entered in an address field. This does not necessarily mean that the address is wrong; check the information in the window and click **Save**.

Following is an example of how the address information should appear in this window:

Street: 123 Main Street Apt 4
City: Long Grove
State/Province: IL
ZIP/Postal Code: 60047

Note Entry Window


In many places in FTD Mercury, you can add notes (such as to an order). Notes are not displayed when invoices, statements, etc. are printed. Use the Notes window to add additional information to the window. When information is saved in this window, a red check mark will appear over the Notes button.

TASK To enter notes in the Note Entry window:

- 1 If you want today's date to display in the note, click **Timestamp**.
- 2 Type your note text.
- 3 Click **Save**.

Setting Up Your Printers

After connecting your printers, you must set up your printer routing and decide which printer you want to print messages, and which printer you want to use for reports.

FTD Mercury automatically detects all printers connected to your system through the FTD Reporter, which is indicated by the  icon located in the lower right-hand corner of your screen.

Checking Your Windows Default Printer

Your Windows default printer is the printer that Windows uses to print all print jobs outside of your FTD Mercury software. Once you have installed FTD Mercury, it is suggested that you check your system to make sure your default printer is correct.

TASK To check your Windows default printer or to make changes to it:

- 1 On the **Windows Start** menu, click **Printers and Faxes**. The **Printers and Faxes** window opens.
- 2 Printers that Windows has detected are listed in this window. The default printer has a check mark next to the printer name. If the printer you want to use as your default Windows printer does not have the check mark next to it, right-click on the printer and click **Set as Default**

Printer. The check mark will be put on the printer you just clicked on, denoting it as the new default printer.

- 3 Close the **Printers and Faxes** window by clicking the **Close** button (✖) in the title bar.

Setting Up Your Reports Printer

Your reports printer is used to print all marketing materials (letters, envelopes, and so on), reports, and customer statements that you create using your FTD Mercury software.

TASK To set up your reports printer:

- 1 Double-click on the **FTD Mercury** icon.
- 2 Log in to FTD Mercury.
- 3 On the **Tools** menu, click **Printer Form Settings**.
- 4 From the **Store Name** list, select your store.
- 5 In the **General Printing** row, in the **Printer Selection** column, select the printer you want to use for printing your store reports and customer statements. In the **Tray** column, select the printing tray for this printer.
- 6 Click **Save**.

Setting Up Your Mercury Message Printer

You can have a separate printer to print your incoming and outgoing Mercury messages. The Mercury Administration program allows you to specify for each incoming or outgoing message type if you want the message to print, the number of copies to print, and indicate which printer and tray you want the print job to be sent. For more information, see [Printer Routing Screen](#) on page 24–80.

Printer Form Settings Window

The Printer Form Settings window allows you to configure the printers and trays associated with each form on a store-by-store basis. You need to configure printer form settings on each FTD Mercury system where you will enter customer orders.

Figure 2-2: Printer Form Settings Window

FORM	PRINTER SELECTION	TRAY
Billing Invoice (Letter)		
Billing Invoice (Legal)		
Worksheet (Letter)		
Worksheet (Legal)		
TriFold Card		
Pool Ticket		
General Printing		

Each form type is listed in the **Form** column. For each form, you can select the printer you want to use for that form, and the tray on that printer. All printers available on the computer are available

for selection, including any network printers you have already set up using the **Add Printer Wizard**. (See [Connecting to Network Printers](#) on page 2–13 for details on setting up network printers.)

Setting Up Your Printers and Form Selections

You use the Printer Form Settings window to configure the printers and trays associated with each form on a store-by-store basis, and on a per-client basis. You need to set this up on each FTD Mercury system where you will enter customer orders. All printers available on the system are available from this window, including network printers.

TASK To configure the printers each form prints on for a store:

- 1 In FTD Mercury, on the **Tools** menu, click **Printer Form Settings**. The **Printer Form Settings** window opens.
- 2 From the **Store Name** list, select the store for which you are configuring forms.
- 3 Locate the form you are configuring in the **Form** column. Click in the corresponding cell in the **Printer Selection** column to display an arrow. Click the arrow to display a list of available printers, and select the printer where you want this form to be printed.
- 4 In the corresponding **Tray** column, click and select the tray on the selected printer which contains the appropriate paper for this form.
- 5 Repeat steps 3 and 4 for any additional forms you want to configure.
- 6 Click **Save**.

IMPORTANT If you have multiple stores, you need to repeat this procedure for each store.

You can configure the number of forms printed for transactions from the **Default Form Printing** screen in **Mercury Administration**. See [Default Form Printing Screen](#) on page 24–82 for details.

Connecting to Network Printers

If you have a network printer that you want to use on clients for printing specific forms, you need to configure your system to connect to the printer.

TASK To add a network printer to your system:

- 1 On the **Windows Start** menu, click **Printers and Faxes**.
- 2 In the **Printers and Faxes** window, under **Printer Tasks**, click **Add a Printer**. The **Add Printer Wizard** opens.
- 3 Follow the prompts in the wizard, making sure you are configuring a network printer.

When you are finished, the network printer appears on your system the same way as local printers do and will be accessible in the **Printer Form Settings** window in FTD Mercury.

Receiving Orders and Messages

Your system is set up to print one copy of an order or message to your default printer when it is received. You may change your system settings so that a message pops up on your screen when an order is received, or you can set an alarm to sound as well (change these settings using the **Printer Routing** screen in Mercury Administration). After a message is received by FTD Mercury, you can then attach the incoming order in Order Entry or Point of Sale and process the order.

Orders received over the telephone can be reported using the Rec Message List.

Setting Up Your Employees and Passwords

When you are set up in FTD Mercury, it is strongly suggested that you add your employees to the computer's database. When you add employees through the Mercury Administration program, you assign passwords and ID numbers (for logging into the system), maintain employee security, and keep personal information in the system. For information on entering and maintaining employee records, see [Employee Folder](#) on page 24–51.

Backing Up Your Data

You can use locally connected devices, such as local hard drives, lomega Zip drives, or USB thumb drives as backup devices for your FTD Mercury data. A backup of the server is performed automatically each morning at 3:00 A.M. Your server must be turned on for the backup to run, and your backup device must be ready (meaning if you are using a Zip drive, the Zip disk must be in the drive or if you are using a thumb drive, it must be plugged in to the USB port).

TIP You can purchase USB thumb drives from FTD. Contact FTD Technology Sales at 1-800-767-3222.

Your FTD Mercury data is compressed (in a .zip file format) and stored on your backup device. A thumb drive or Zip disk can handle several days' worth of backups. When a ZIP disk gets full, the oldest data is automatically removed. In most cases, thumb drives and external hard drives will not fill up from backups. Typically, you have between 3 and 14 days worth of backups stored before the oldest backup is overwritten.

IMPORTANT If you want to add a new backup device, or if you want to configure the number of backups to keep on a device, contact the Mercury Technology Assistance Center at 1-888-309-2244 for assistance.

To protect yourself from losing data, you may want to rotate Zip disks every day, or alternate thumb drives each week. For optimal security and peace of mind, you may want to store backups off site periodically.

If you use a Zip drive for backup, you can purchase your own Zip disks to use in your Zip drive. You can purchase Zip disks at any office supply store. Make sure that you buy the disks labeled as "250M" or "750M." 100M disks are not compatible with your lomega Zip Drive.

IMPORTANT To restore data from a backup device, please call the Mercury Technology Assistance Center at 1-888-309-2244.

Daily/Weekly/Monthly Checklists

You should run certain procedures on a regular basis to keep your shop running smoothly. For example, if you have Point of Sale you have to set an opening balance at the beginning of the day, and then close the cash drawer at the end of the day. To get you started, this section contains a recommended list of procedures that you should complete on a daily, weekly, and monthly basis.

Daily Checklist

At the beginning of the day...

- Check that your automatic backup from last night was completed.

- ❑ Remove your backup media (Zip disk or USB thumb drive) and store it in a safe place (ideally offsite).
- ❑ Replace your backup media (either a different Zip disk or USB thumb drive) on your server. As a best practice, you should alternate between two or more Zip disks or USB thumb drives and store the ones not being used for backup that night offsite. You can purchase additional USB thumb drives from FTD.

TIP

You can purchase USB thumb drives from FTD. Contact FTD Technology Sales at 1-800-767-3222.

- ❑ Set the opening balance for each Point of Sale terminal. See [Setting the Opening Balance](#) on page 11–3 for details.

Daily Procedures

It is highly recommended that you complete each of these procedures on a daily basis.

- ❑ Use Ticket Search to check for pending orders, particularly orders that are pending due to credit card authorization. See [Searching for Tickets](#) on page 9–47 for details.
- ❑ Check to see if you have incomplete orders and process them. See [Searching for Tickets](#) on page 9–47 for details.
- ❑ Open Order Entry or Point of Sale, click Message Center, and attach incoming orders (by double-clicking on them). Unattached orders appear in green text. See [Attaching Incoming Orders](#) on page 9–22 for details.
- ❑ Check for any credit card errors or declined credit card transactions. See [Handling Unsettled Credit Card Authorizations](#) on page 13–12 for details.

At the end of the day...

- ❑ Verify all incoming wire orders have been attached. See [Attaching Incoming Orders](#) on page 9–22 for details.
- ❑ Verify all orders for the day have been completed. Look at the Dashboard for a quick glance of what may remain to be done, and perform a Ticket Search for tickets with statuses of pending, incomplete, or filed. See [Dashboard](#) on page 25–1.
- ❑ Ensure all orders have been marked as Designed in Design Center. See [Design Center](#) on page 12–1.
- ❑ For Mercury Delivery users, verify all orders have been marked as delivered. See [Mercury Delivery](#) on page 14–1.
- ❑ Balance your cash drawers and close your Point of Sale systems by using Z-out transactions. When you perform a Z-out, FTD Mercury automatically performs an X-Out transaction first, allowing you to find errors and correct them prior to finalizing the Z-out transaction. See [Z-Out Transactions](#) on page 11–7.

TIP

To help balance a cash drawer, perform a Ticket Search for completed orders. Verify that sales were entered correctly. Common issues that can cause the cash drawer to be out of balance include cash sales being completed in Order Entry instead of Point of Sale, and payments on accounts made from the FTD Mercury Main Menu instead of Point of Sale (if you are putting money in the cash drawer, you should use Point of Sale).

- ❑ Print the Credit Card Settlement History report for today. See [Credit Card Settlement History Report](#) on page 19–16.
- ❑ Prepare your bank deposit.

- ❑ Run the Balance Report using the Balance Wizard in Mercury Accounting. Print any pages you need for your records. [The Balance Wizard \(Exporting to QuickBooks\)](#) on page 20–15.
- ❑ Double-check your backup media (Zip disk or USB thumb drive) in place for your server.

Weekly Checklist

The following items may be completed at any time. However, it is suggested that they be done on a weekly basis.

- ❑ Report phoned-in Mercury Orders to FTD by sending REC messages.
- ❑ Print an Orders Filled report for other wire services.
- ❑ Run a Symantec AntiVirus Live Update.

TASK **To run a Symantec AntiVirus Live Update:**

- 1 On the **Windows Start** menu, point to **All Programs**, point to **Symantec Client Security**, and click **Symantec AntiVirus**.
- 2 Click **Live Update**.
- 3 Follow the on-screen instructions to update your virus definitions.

Monthly Checklist

You should perform the following tasks on a monthly basis:

- ❑ Print the Aged Analysis report (you should also save an electronic copy of it). Proof the report to ensure it is accurate, and make any necessary corrections to accounts. See [Aged Analysis Reports](#) on page 19–7.
- ❑ Generate customer statements. See [Generating Statements](#) on page 18–12 for detailed instructions.
- ❑ When you receive your Combined Report, perform wire reconciliation. See [Wire Service Reconciliation](#) on page 17–1 for details.
- ❑ Print the Sales Tax report. See [Sales Tax Report](#) on page 19–56.
- ❑ Print the Sales Summary report. See [Sales Summary Report](#) on page 19–50.
- ❑ Print any other applicable reports.
- ❑ Complete a General Ledger export. If you use the Accounting module, see [The Balance Wizard \(Exporting to QuickBooks\)](#) on page 20–15. If you use the legacy General Ledger Export feature, see [Exporting the General Ledger File](#) on page 21–4.
- ❑ Run a Windows Update. Running a Windows Update monthly keeps your system up-to-date and helps prevent viruses from infecting your computer.

TASK **To run a Windows Update:**

- 1 On the **Windows Start** menu, point to **All Programs**, and click **Windows Update**.
- 2 On the Microsoft Web site, follow instructions to update Windows.

Configuring Your System

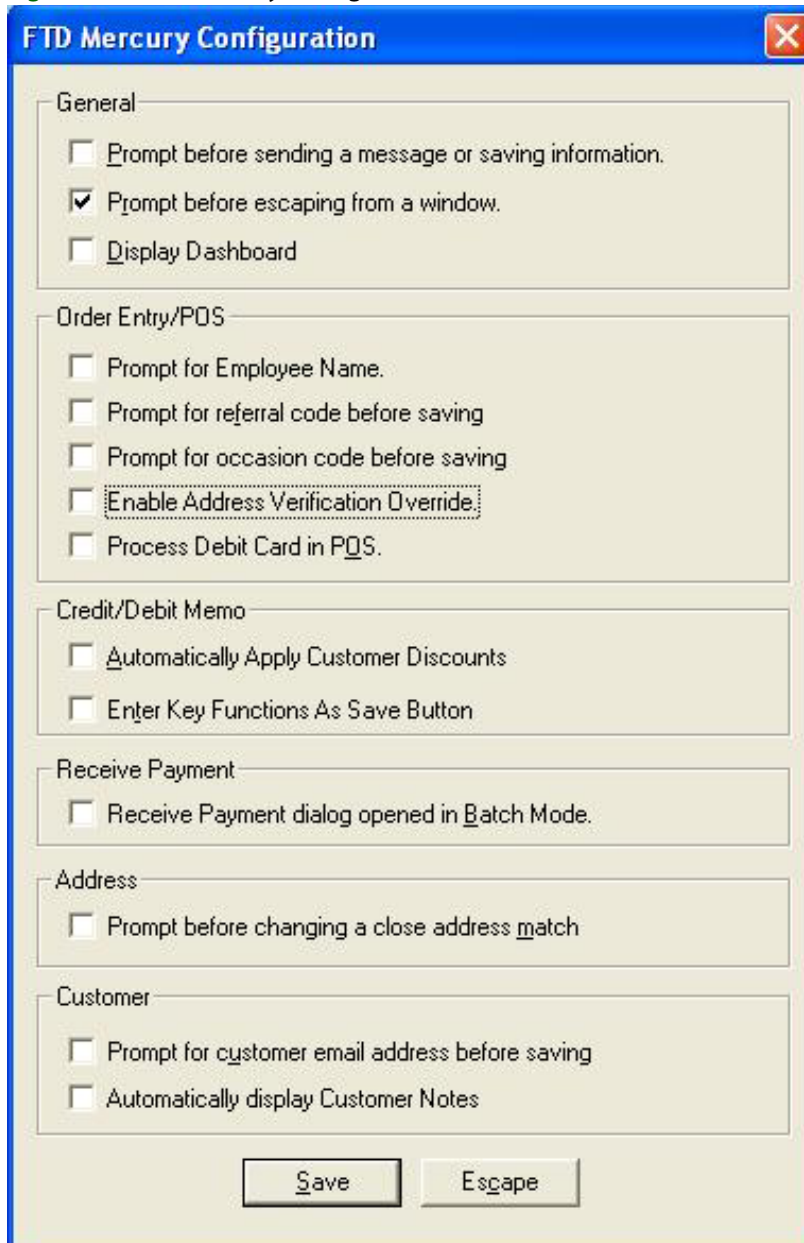
TASK **To configure general system preferences:**

- 1 On the **Tools** menu, click **Settings**. The **FTD Mercury Configuration** window opens. (See [FTD Mercury Configuration Window](#) on page 2–17 for a detailed description of all options.)
- 2 Set options as necessary.
- 3 Click **Save**.

FTD Mercury Configuration Window

The FTD Mercury Configuration window allows you to set client-level preferences in FTD Mercury.

Figure 2-3: FTD Mercury Configuration Windows



The following options are available in the FTD Mercury Configuration window:

Table 2-14: FTD Mercury Configuration Window Options

Option	Description
Prompt before sending a message or saving information	When checked, you receive the message "Are you ready to send this order or message" before sending an order or message.
Prompt before escaping from a window	When checked, you receive the message "Do you want to continue and lose what has been entered?" when closing a window without saving.

Table 2-14: FTD Mercury Configuration Window Options (cont.)

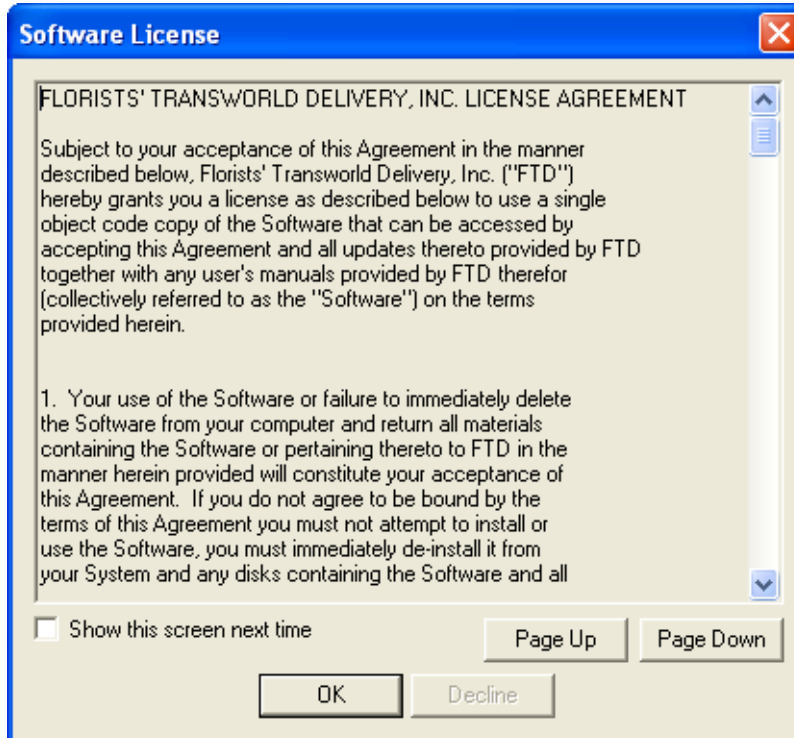
Option	Description
Display Dashboard	When checked, this option will automatically open the Dashboard when FTD Mercury starts.
Prompt for referral code before saving	When this option is checked, you receive the following message in Order Entry and Point of Sale if you attempt to save the order with the Referral Code field blank: "A marketing referral code was not assigned to this order. Do you still wish to complete this order?"
Prompt for occasion code before saving	When this option is selected, the occasion code in Order Entry and Point of Sale is by default blank. The employee must select an Occasion Code prior to completing the order. If this option is not selected, the Occasion Code list defaults to Other .
Enable Address Verification Override	When you select this option, the Verify check box is displayed for recipient addresses in Order Entry and Point of Sale (allowing you to override address verification when entering orders on an order-by-order basis).
Process Debit Card in POS	Applies only to Point of Sale systems licensed for debit card processing within FTD Mercury (and is only available for Canadian systems). Select this option if you want to enable debit card processing via a PIN pad in Point of Sale. If you do not enable this, the PIN pad will not function.
Automatically Apply Customer Discounts	(Only applies if you use credit/debit memos). If there is a discount on a customer account and you want that discount applied automatically when the customer is selected, make sure that this option is checked. If you leave this option unchecked, then you will have to enter the discount manually.
Enter Key Functions as Save Button	(Only applies if you use credit/debit memos). If this option is checked, this means that if you press the Enter key while you are in the product grid, you automatically save the credit/debit memo. If you leave this option unchecked, then product information displays when you press the Enter key while you are in the product grid.
Receive Payment dialog opened in Batch Mode	When checked, the Receive Payment window opens in "Batch Mode." Batch mode makes the window stay open after you click the Complete button so that you can enter several payments (without having to re-access the window each time). If you would NOT like the window to open in batch mode, make sure this option is unchecked.
Prompt before changing a close address match	This option is only valid if you have Address Verification. When this option is checked, the system first prompts you before changing an address to a close match (for example, a misspelled street name or changing "100 Main St" to "100 N Main Street"). If this option is unchecked, you are not prompted first if the system finds an address that is close to the address that you entered.
Prompt for customer email address before saving	When this option is checked, the system asks "Would you like to enter an email address for this customer?" upon saving if you do not enter an email address for a new customer in the Customer Detail Information window.
Automatically display Customer Notes	If you select this option, if you are entering or opening an order for a customer with associated notes in Order Entry or Point of Sale, the Notes window will automatically open.

When you finish making changes in this window, click **Save**.

Software License Window

The **Software License** window opens when you select License Agreement from the Help menu.

Figure 2-4: Software License Window



Carefully read the license agreement in this window. To read the entire license agreement, click the Page Down button each time you are ready to read the next page. When you reach the end of the agreement, the Accept button will become active. Click this button to start your FTD Mercury software.

If do not want to see this license agreement window again, ensure the Show this screen next time box is not checked.

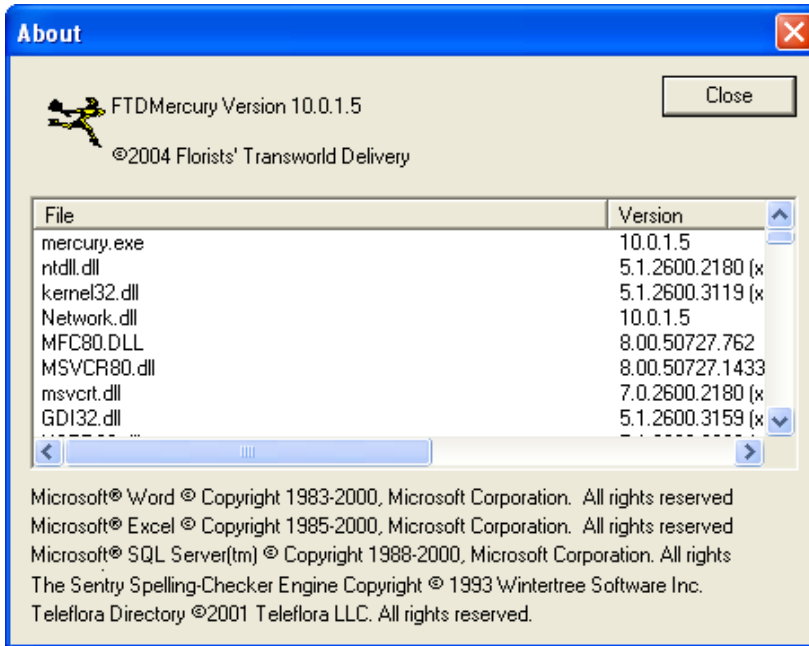
If you do not agree with the terms of the license agreement, click Decline. The software will not start. Contact the FTD Sales Department at 1-800-669-1000 to discuss the terms of the license agreement.

About Window

The About window is used to view your system's version number and copyright information.

Click Close to close the window.

Figure 2-5: About Window



Video Chat

If you have a Logitech QuickCam Orbit AF camera, you can use it for video chat in conjunction with SightSpeed. This functionality allows you to chat in real time with other video-chat enabled florists to discuss designs, answer order questions, or otherwise build relationships. You can also use it to chat with FTD personnel. For more information about video chat on FTD Mercury systems, contact FTD Mercury Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com.