

Customer Maintenance

FTD Mercury makes maintaining customers easy. If you use house accounts for your customers, after setting up these accounts, the customer billing process is automated (using the Accounts Receivable Billing module). FTD Mercury stores each customer transaction through Order Entry and Point of Sale. Each order, purchase, or payment made at your store may be applied to a customer's house account. FTD Mercury also stores customer credit card information if your customers use credit cards for purchase.

Default customers such as your cash sales account, credit card accounts, and wire service accounts are also maintained in the customer screens of the program.

Maintaining your customer database in FTD Mercury also helps you with your store's marketing strategies. If you consistently add customers to the program, you will soon have a complete listing of all your customers and their personal information.

Maintaining your customers is beneficial when preparing mailings; you may use the FTD Mercury marketing templates to merge your customer information into labels, letters, and envelopes. If you have the Mercury Marketing module, you can use your customer information to create direct mail and email marketing campaigns.

Customers and Multiple Stores

Each customer has a store of origin. The store of origin is the store where the customer was first added to the system. When you add a customer to the system (see [Adding New Customers](#) on page 7–24), you specify the customer's store of origin. Then you can use FTD Mercury to print reports by store, view order history by store, and generate or print statements by store.

Starting with version 7.0 (including when you upgrade to it), FTD Mercury automatically assigns each of your customers a store of origin. If a customer has placed orders at more than one of your stores, then that customer's store of origin is determined based on the store where that customer's first sale occurred. If a customer does not have any sales, then that customer is associated with the first store that was created on the system.

Customer Detail Information Window

The Customer Detail Information window is the central method of accessing customer information in FTD Mercury. The tasks you can perform from this window include:

- » [Adding New Customers](#)
- » [Setting Up House Accounts](#)
- » [Viewing Customer Statistics](#)
- » [Searching for Customers](#)

- » [Maintaining Credit Card Information](#)
- » [Viewing a Customer's Order History](#)

Customer Detail Information Window Tabs

The window itself consists of the following tabs, each of which contains important information about the customer account:

- » [General Tab](#)
- » [House Account Tab](#)
- » [Statistics Tab](#)
- » [Credit Cards Tab](#)
- » [Contacts Tab](#)
- » [Order History Tab](#)
- » [Marketing Tab](#)
- » [Statement Tab](#)
- » [Standing Order Tab](#)

General Tab

The General tab of the Customer Detail Information window is used to add and update general customer information in your computer's database. When adding a new customer, you must first complete this tab before setting up a house account.

Figure 7-1: Customer Detail Information Window General Tab

The screenshot shows a software window titled "Customer Detail Information - Bernice Butterworth : 000022". The window has a blue title bar and a standard Windows-style close button in the top right corner. Below the title bar is a tabbed interface with the following tabs: "General", "House Account", "Statistics", "Credit Cards", "Contacts", "Order History", "Marketing", "Statement", and "Standing Order". The "General" tab is currently selected and active. The main content area of the window is divided into several sections:

- Customer:** A text field for "Name" containing "Bernice Butterworth" and a dropdown menu for "Sort Name Key" showing "Butterworth, Bernice".
- Address Information:** A dropdown menu for "Home*" set to "Home*", a text field for the address "832 Worcester Avenue OAK PARK, IL 60304", and a checked checkbox for "Billing Address".
- Contact Information:** A dropdown menu for "Home*" set to "Home*", a text field for the phone number "203-123-4566", a checked checkbox for "Primary Phone", and a text field for the email address "bernicebutterworth@comcast.net".
- Store Of Origin:** A list box showing "Branch Store" and "Margie's Flowers", with "Margie's Flowers" selected.
- Tax Details:** A checkbox for "Tax Exempt", a text field for "Exempt Code", a text field for "Discount Percent" set to "0.00", and a dropdown menu for "Referral Code" set to "Friend".
- Marketing/Status:** A group of checkboxes: "Delivery Confirmation" (checked), "Include In Direct Mail Marketing" (checked), "Include In E-Mail Marketing" (checked), "Active Status" (checked), and "Do not Purge" (unchecked).

At the bottom of the window, there is a "Notes..." button and a row of control buttons: "Save", "Print", "Previous", "Next", "Delete", "Escape", and a checkbox for "Batch Mode".

This window contains the following areas:

Customer Area

The Customer area contains the customer name and sorting information.

Table 7-1: Customer Area Fields

Field	Description
Customer Name	<p>Enter the customer's name. For a non-house account, this is the name of the person or business that is placing the order. If a house account will be associated with this customer, this should be the name of the person or company who is responsible for payment on the account.</p> <p>For efficiency, you should enter customer names in a consistent format. For example, you may want to enter individuals in a First Name/Last Name format, and businesses by their official name,</p> <p>You cannot change the customer name for any built-in customers for FTD Mercury. These include:</p> <ul style="list-style-type: none"> » Purged Customer » Cash Sales » Florist Transworld Delivery » American Floral Services, Inc. » Bloomlink Wire Service » Dove » Teleflora, Inc. » Value Network Service
Sort Name Key	<p>Enter the name by which FTD Mercury will sort this customer's name for reports and statements. By default, this field sorts according to a Last Name/First Name format, but you can enter another format if you prefer.</p>

Address Information Area

This area contains the customer's address information.

Table 7-2: Address Information Settings

Setting	Description
Address Type	<p>From this list, select the address type for the address you are entering in the address field. You may enter multiple addresses, each associated with a different address type. You can configure the available address types in Mercury Administration.</p>
Address	<p>Enter the customer's address associated with the selected address type. If the customer is opening a house account, be sure to record the address where the customer's bills are to be sent.</p>
Billing Address	<p>Select this option if the address displayed is the billing address for the customer. Statements print with the billing address.</p>

Contact Information Area

The Contact Information area contains additional contact information about the customer, including the customer's phone number and email address.

Table 7-3: Contact Information Settings

Setting	Description
Phone Number Type	Select the phone number type for the customer's phone number you will enter in the phone number field. You may enter multiple phone numbers, each associated with a different phone number type. You can configure the available phone number types in Mercury Administration.
Phone Number	For the selected phone number type, enter the phone number. You can use punctuation as you prefer, such as parentheses and dashes.
Primary Phone	If this is the primary phone number where the customer can be reached, select this option. You can only make one recorded phone number the primary phone number.
E-mail Address	Enter the email address for the customer. You should include an email address if you plan to email statements, invoices, or delivery confirmations to the customer. Email addresses are also used for marketing purposes.

Store of Origin List

If you have multiple stores, the Store of Origin list allows you to specify at which store the customer originated. By default, the store you are logged in to is selected. If necessary, select another store.

Tax Details Area

The Tax Details area contains the following settings:

Table 7-4: Tax Details Settings

Setting	Description
Tax Exempt	Select this check box if the customer is tax exempt. If you select this option, the Exempt Code field is enabled.
Exempt Code	If you have selected the Tax Exempt option for this customer, provide the customer's tax exemption number in this field.

Miscellaneous Customer Settings

Below the Tax Details area, there are several additional settings that you can configure for customers:

Table 7-5: Miscellaneous Customer Settings

Setting	Description
Discount Percent	If this customer is receiving a discount on purchases, enter the discount percentage in this field. Enter the percentage without the percent sign. The discount percent is automatically deducted from the product total each time the customer places an order (discounts are not applied automatically to fees, etc., but you can enter manual discounts in Order Entry and Point of Sale). Setting the percentage to zero indicates that no automatic discounts apply. Discounts can be overridden when you enter a transaction.

Table 7-5: Miscellaneous Customer Settings (cont.)

Setting	Description
Referral Code	From this list, select the way in which this customer learned about your store.
Delivery Confirmation	When you selected, this option indicates that you want to send delivery confirmation email messages to this customer. Delivery confirmation email messages enable you to inform your customers that an order has been sent (outgoing) or delivered (local delivery). Selecting this option activates the delivery confirmation fields in Order Entry and Point of Sale when entering an order for this customer.
Include in Direct Mail Marketing	When selected, this option indicates that you want to send marketing letters or postcards to this customer. Clearing this option excludes this customer from all direct mail marketing campaigns in Mercury Marketing and from any marketing letters you create from the Mercury Forms templates folder.
Include in E-Mail Marketing	When selected, this option indicates that you want to send marketing email messages to this customer. Clearing this option excludes this customer from all of your email marketing campaigns in the Mercury Marketing application.
Active Status	When you select this option, this customer will be included in customer searches. When this option is not selected, customer searches will not return this customer in the results list, even if the customer matches the search criteria.
Do not Purge	When selected, this option protects this customer from purges using the Purge Customer utility.

Notes

The Notes button, located at the bottom right of this tab, allows you to add or view any notes about this customer. If there are notes for this customer, the button has a red background.

House Account Tab

The House Account tab in the Customer Detail Information window allows you to set up a house account for customers and view house account information. Defaults for house accounts are configured in Mercury Administration.

Figure 7-2: Customer Detail Information Window House Account Tab

The House Account tab contains the following settings:

Table 7-6: House Account Tab Settings

Setting	Description
Account ID	<p>Enter the customer's house account ID. FTD suggests you use the first five letters of the customer's last name, followed by the first two letters of the first name as your convention. However, you can enter your own alphanumeric account number, or click Auto to have FTD Mercury automatically assign an account number.</p> <p>You cannot change the account ID for any built-in customers for FTD Mercury. These include:</p> <ul style="list-style-type: none"> » Purged Customer » Cash Sales » Florist Transworld Delivery » American Floral Services, Inc. » Bloomlink Wire Service » Dove » Teleflora, Inc. » Value Network Service
Accounting Type	<p>Select whether this customer account should use open item or balance forward accounting.</p> <ul style="list-style-type: none"> » Customers with balance forward accounts receive statements that show running unpaid balances. As payments are made, the payment is subtracted from the oldest invoice. » Open item accounts are typically used for companies that pay by invoice (or customers that prefer to do so). As each payment is made, it is applied to an individual sale.

Table 7-6: House Account Tab Settings (cont.)

Setting	Description
Credit Limit	Enter the credit limit you want to extend to this customer.
Billing Cycle	Select the cycle at which to bill this customer. You can select Daily, Weekly, Biweekly, Semi-Monthly, or Monthly.
Default Payment	Select your preferred payment method for this house account (usually, this value should be House).
Annual Finance Charge	Enter the percentage you want to charge for late payments.
Minimum Finance Charge	Enter the minimum finance charge dollar amount you want to charge to overdue accounts. FTD Mercury will charge the greater of the finance charge percentage or this value.
Finance Grace Period	Enter the number of days you want to wait before assessing finance charges to this account.
Print Statements	When you select this option, the customer's statement will be printed when statements are generated.
Print Invoices	<p>When you select this option, a copy of the letter billing invoice for this customer will be printed when statements are generated. A copy of each invoice printed on the statement will be printed in the order in which they appear on the statement. If both statements and invoices are configured to print on the same printer from the same tray, you are prompted to load invoice forms into the printer after statements are printed.</p> <p>NOTE: When you generate statements for an account that has Print Invoices selected, the text "Invoices Enclosed" is printed on the statement.</p>
Fax Statements	When you select this option, the customer's statement will be faxed when statements are generated.
Email Statements	When you select this option, the customer's statement will be emailed when statements are generated.
Print Dunning Messages	Select this check box if you want to print dunning messages on this customer's statements. You can set up dunning messages in Mercury Administration.
Terms on Account	Enter any additional text you want to be printed on this customer's statements.

Statistics Tab

The Statistics tab of the Customer Detail Information window includes valuable statistical information for the customer. These statistics provide an overall glimpse of this customer's buying patterns so you may gear your marketing to those patterns. It also includes the house account standings for the customer. The statistics displayed are automatically generated by FTD Mercury and cannot be modified manually.

Figure 7-3: Customer Detail Information Window Statistics Tab

The screenshot shows the 'Statistics' tab of the 'Customer Detail Information' window for Heather Smithe (ID: 0000009). The window has several tabs: General, House Account, Statistics (selected), Credit Cards, Contacts, Order History, Marketing, Statement, and Standing Order. The main content area is divided into several sections:

- Accounting Balance:** Number of days late: 0; Total Balance Due: (\$8.55).
- Aging Information:** Current Balance: (\$8.55); 30 Day Balance: \$0.00; 60 Day Balance: \$0.00; 90 Day Balance: \$0.00; 120 Day Balance: \$0.00.
- Sale Information:** Average Sale: \$36.29; Last Year Sale Count: 0; Last Year Sale Total: \$0.00; Year To Date Sale Count: 4; Year To Date Sale Total: \$145.16.
- Average Sales By Occasion:** A table with columns 'Occasion' and 'Amount'.

Occasion	Amount
	0.00
Anniversary	0.00
Birthday	0.00
Business Gifts	0.00
Holiday	0.00
Illness	0.00
- Last Purchase Date:** Friday, August 22, 2008.

At the bottom, there is a 'Detail' button and a row of navigation buttons: Save, Print, Previous, Next, Delete, and Escape. A 'Batch Mode' checkbox is also present.

Account Balance Area

The Account Balance area contains information about the customer's house account balance, including the total balance due and aging information. If you click the Detail button, the Customer Account Balance Detail window opens.

The Last Purchase Date field displays the day and date of the the last purchase made by the customer.

Sale Information Area

The Sale Information area displays information about the customer's purchase habits. This information includes:

- » Average sale amount
- » Sale count for last year
- » The total amount spent last year
- » The sale count for this year (thus far)
- » The total amount spent this year (thus far)

Average Sales By Occasion Area

This area shows a breakout of average sale amounts by occasion for this customer.

Customer Account Balance Detail Window

The Customer Account Balance Detail window provides a breakdown of all house charge transactions, including paid and unpaid transactions, credit memos, finance charges, payments, cancelled orders, and refunded orders for the selected store and beginning with the specified start date. It also includes other customer information.

Figure 7-4: Customer Account Balance Detail Window

Customer Account Balance Detail - Heather Smith: 0000009

Customer Name: Heather Smith Accounting Type: Balance Forward Last Purchase Date: 8/22/2008
 Account Nbr: 0000009 Customer Status: Active Last Payment Date: 8/22/2008
 Last Statement Date: 8/20/2008

Search Parameters:
 Selling Store: --All Stores-- Starting Delivery Date: 8/22/2008 **Search**

Sale	Selling Store	Sale Date	Deliv. Date	Recipient Ref.	Sale Type	Amt. Charged	Remaining Bal.	Acct. Balance
69/1	Doc's Blooms	8/22/2008	8/22/2008	Refund of Sale #5...	Carry Out	(\$56.58)	(\$8.55)	(\$8.55)
67/1	Doc's Blooms	8/22/2008	8/25/2008	Heather Smith	Local	\$56.58	\$56.58	(\$8.55)
43/2	Doc's Blooms	5/6/2008	9/25/2008	Kim Williams	Local	\$48.03	\$0.00	(\$8.55)

Print **Close** **Total Balance Due: (\$8.55)**

The window is divided into four main areas: Customer Information, Search Parameters, Results List, and Button Ribbon.

Customer Information Area

All information in the customer information area is read only. It includes the following info.

- » Customer Name
- » Account ID
- » Accounting Time
- » Customer Status
- » Last Purchase Date
- » Last Payment Date
- » Last Statement Date

Search Parameters Area

You can select two parameters in this area. From the Selling Store list, select the store where the transaction occurred, or select All Stores to search in all stores. In the Start Date field, enter the starting date for the search. Transactions must appear after the selected date to be returned in the results list.

Results List

The results displayed in this list include all house charge transactions (including paid and unpaid transactions), debit memos, credit memos, finance charges, payments, cancelled order, and

refunded orders. To appear in the list, the date of the transaction must be equal to or greater than the start date entered.

Table 7-7: Results List Columns

Column	Description
Sale	The sale ID for the transaction.
Selling Store	The store where the transaction took place.
Sale Date	The transaction date.
Deliv Date	The delivery date for orders. If a transaction was not an order (a finance charge or payment, for example), the value is the same as the Sale Date.
Recipient/Ref	For orders, this is the recipient.
Sale Type	The transaction type (Payment, Local order, Wire Out, Carry Out, Finance Charge, etc.).
Amt Charged	The amount charged to the house account. This may be different than the total amount of the transaction.
Remaining Balance	The remaining balance on the ticket. For Balance Forward accounts, once the balance has been paid, this amount will be \$0.00; prior to payment, this amount will be the same amount as the Amt Charged. If partial payment was received, this will be the unpaid balance. For Open Item accounts, this will be the remaining balance on that particular ticket. Payments may have a remaining balance if the payment has not yet been allocated.
Acct Balance	The balance on the account as of that transaction.

When results are displayed in the Customer Account Balance Detail window, the following color coding is used:

Table 7-8: Customer Account Balance Detail Window Legend

Format	Description
Yellow Highlight	Cancelled tickets
Light Blue Highlight	Sales with associated refunds
Green Text	Sales for future dates.

If you double-click on a transaction in the results list, FTD Mercury opens the transaction for you to view. When you close the transaction, you are returned to the Customer Account Balance Detail window.

Button Ribbon

The button ribbon consists of two buttons. Click Print to print the Customer Account Balance Detail report. Click Close to close the window and return to the Statistics tab of the Customer Detail Information window.

Customer Account Balance Detail Report

You can print the Customer Account Balance Detail report by clicking Print in the Customer Account Balance Detail window. This report is printed to the printer configured for General Printing on your FTD Mercury system.

Figure 7-5: Customer Account Balance Detail Report

CUSTOMER ACCOUNT BALANCE DETAIL								
All Stores								
Customer Account Type: Balance Forward								
Starting Delivery Date: 08/22/2008								
Account Balance as of: 10/16/2008								
Customer Name:	Heather Smilhe	Account Number:	0000009					
Primary Address:	205 N BECK RD CANTON, MI 48187-4808	Customer Status:	Active					
<u>Phone Type</u>	<u>Phone Number</u>	Last Purchase Date:	August 22, 2008					
Work		Last Payment Date:	August 22, 2008					
Home	734-459-12212	Last Statement Date:	August 20, 2008					
Customer Notes:								
Sale#	Selling Store	SaleDate	Del Date	Sale Type	Recipient/Ref	Charge Amt	Remaining Bal	Acct Balance
68/1	Doc's Blooms	08/22/2008	08/22/2008	Carry Out	Revised of sale #591	-55.58	-8.55	-8.55
67/1	Doc's Blooms	08/22/2008	08/25/2008	Local	Heather Smilhe	56.58	56.58	-8.55
43/2	Doc's Blooms	05/06/2008	09/25/2008	Local	Kim Williams	48.03	0.00	-8.55

The report includes the following information:

- » Customer Account Type (balance forward or open item)
- » Starting Delivery Date (the date selected in the search)
- » Account Number
- » Account Balance
- » Customer Name
- » Primary Address
- » Phone Information
- » Customer Status (active or inactive)
- » Last Purchase Date
- » Last Payment Date
- » Last Statement Date
- » Customer Notes

A table of individual sales starting on the specified delivery date for the store(s) is then provided (dates before the specified date are not included). Transactions are listed in chronological order, with the oldest first. Each sale includes the following information:

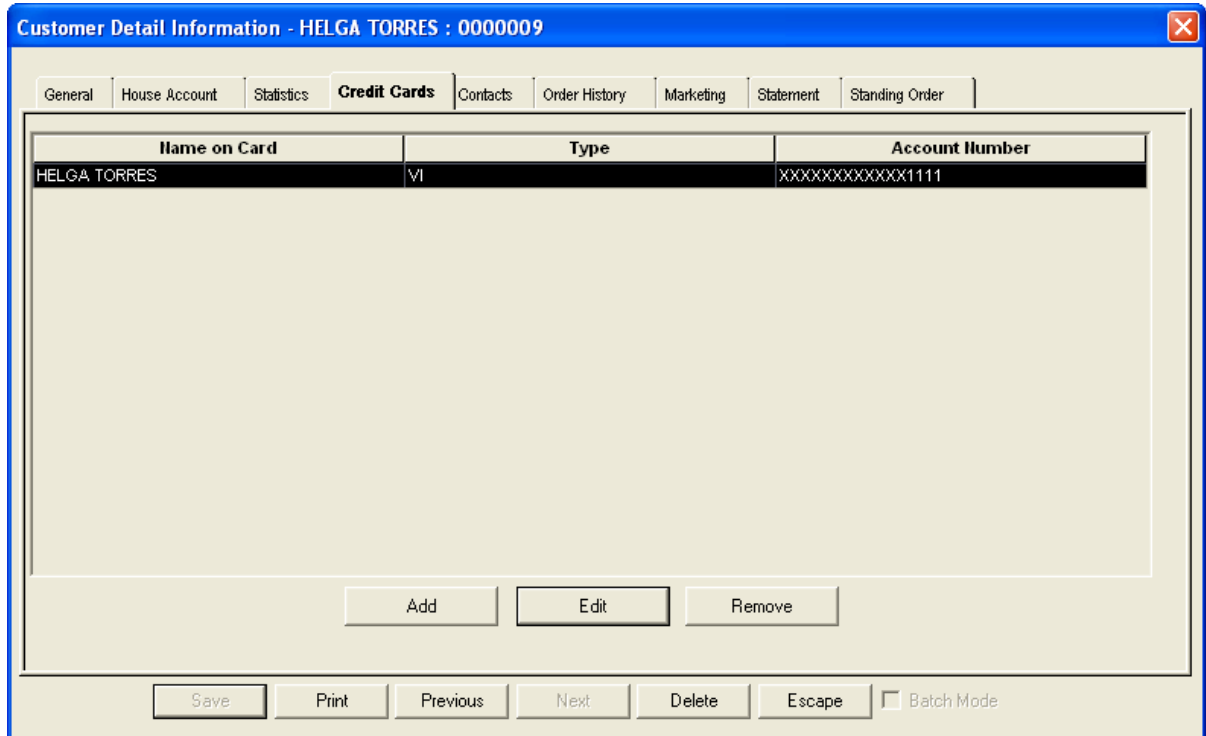
Table 7-9: Customer Account Balance Detail Report Columns

Column	Description
Sale #	The sale ID of the transaction.
Selling Store	The store where the transaction occurred.
Sale Date	The date of the transaction.
Delivery Date	The delivery date for orders. If the transaction was for something other than the order, this date will be the same as the Sale Date.
Sale Type	The transaction type. This can be a sale type (Local Delivery, Carry Out, Wire Out, etc.), or a transaction type (Payment, Finance Charge, etc.).
Recipient/Reference	The name of the recipient for orders.
Charge Amount	The transaction amount. If this is payment, the amount is negative.
Remaining Balance	The remaining balance on the ticket. For Balance Forward accounts, once the balance has been paid, this amount will be \$0.00; prior to payment, this amount will be the same amount as the Amt Charged. If partial payment was received, this will be the unpaid balance. For Open Item accounts, this will be the remaining balance on that particular ticket. Payments may have a remaining balance if the payment has not yet been allocated.
Account Balance	The running account balance, including the Charge Amount.

Credit Cards Tab

This tab displays the credit cards that this customer has used to pay for items in your shop.

Figure 7-6: Customer Detail Information Window Credit Cards Tab



For each credit card, this tab displays:

- » Name on card
- » Type (credit card type)
- » Account number (credit card number)
- » Expiration date

When a customer uses a credit card for purchase, this information is automatically stored in this tab.

You may want to limit employee access to this window. To do so, you should modify employee access in Mercury Administration.

Customer Credit Card Window

The Customer Credit Card window opens when you click Add in the Credit Cards tab of the Customer Detail Information window. It allows you to add a customer's credit card information to FTD Mercury, allowing your customers to quickly and efficiently charge orders on this credit card for future orders.

Figure 7-7: Customer Credit Card Window

The screenshot shows a window titled "Customer Credit Card" with a blue header and a close button (X) in the top right corner. The window contains four input fields: "Name" with the text "HELGA TORRES", "Number" with a masked account number, "Type" with the text "Visa", and "Expiration date" with the text "08/2009" and a small calendar icon. At the bottom of the window are two buttons: "Save" and "Escape".

This window contains the following fields:

Table 7-10: Customer Credit Card Window Fields

Field	Description
Name	Enter the name of the customer as displayed on the front of the credit card.
Number	Enter the account number displayed on the front of the card. When you enter the account number, the Type field will fill in automatically.
Type	The type of credit card. This is automatically populated based on the account number.
Expiration Date	Enter the month and year of the card's expiration.

Contacts Tab

The Contacts tab in the Customer Detail Information window allows you to add names of other people with permission to charge to this account. For example, you may want to store employee or department names in this tab if the customer is a business, or family member names if the customer is an individual.

Figure 7-8: Contacts Tab in the Customer Detail Information Window

Contact Name	Job Title	Phone Number
Heather		734-555-1212

Recipient	Address	City	State	Postal Code	Phone Number
Andrew Benke	123 W LAKE ST	CHICAGO	IL	60601-3202	
Heather Smith	123 N MAIN ST	PLYMOUTH	MI	48170-1235	734-555-1212
Heather Smith	123 N MAIN ST	PLYMOUTH	MI	48170-1235	1231231234
Jane Smith	123 W LAKE ST	CHICAGO	IL	60601-3202	

Batch Mode

You can also remove recipients for this customer. When you remove a recipient, it no longer is displayed as an option in Order Entry or Point of Sale in the Customer list.

When you are finished making changes to this tab (after adding, editing, or removing customer contacts), click Save to save your changes.

Adding New Customer Contacts

TASK To add a new contact:

- 1 In the contacts area (at the top), click **Add**.
- 2 Click in a cell in the new row and start typing.
- 3 Click **Save** to save your changes before closing this window.

Editing Existing Customer Contacts

TASK To edit an existing customer contact:

- 1 In the contacts area (at the top), click in the column for the contact you want to edit.
- 2 Retype the information for that column.
- 3 Click **Save** to save your changes before closing this window.

Removing Existing Customer Contacts

TASK To remove an existing customer contact:

- 1 In the contacts area (at the top), select the contact.
- 2 Click **Remove**.
- 3 Click **Save** to save your changes before closing this window.

Removing Recipients for a Customer

TASK To remove a recipient for a customer:

- 1 In the recipients area (at the bottom), select the recipient you want to remove.
- 2 Click **Remove**.
- 3 Click **Save** to save your changes before closing this window.

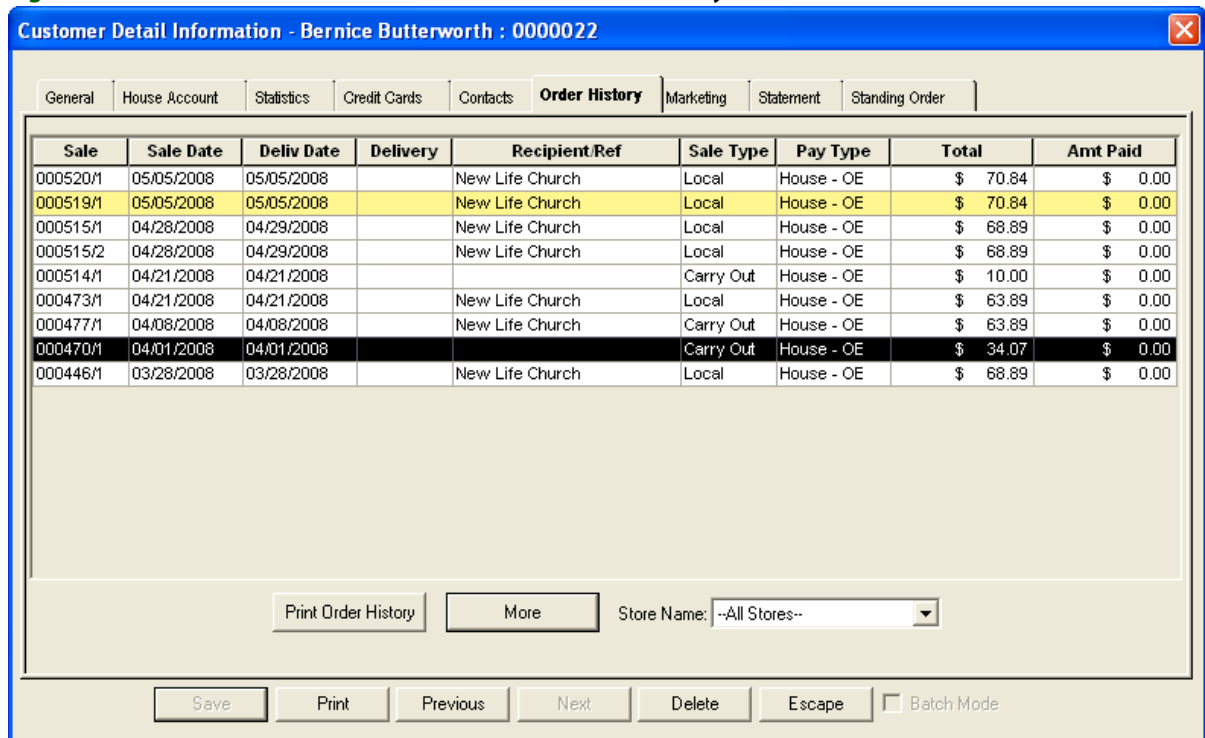
Order History Tab

The Order History tab in the Customer Detail Information window displays previous orders that the customer has placed at your store. By default, orders from all stores display. You can filter a customer's order history by store by selecting the store from the Store Name list.

This window also displays payment history. Dollar amounts in the Total column enclosed in parentheses indicate credits to an account (customer payments or credit memos), whereas dollar amounts not enclosed indicate debits to an account (orders or debit memos). If you double-click on an order, you can view detailed information about that order.

NOTE If you double-click a finance charge transaction, you will receive a message indicating you cannot access it (because it is a charge and not a ticket).

Figure 7-9: Customer Detail Information Window Order History Tab



The Order History tab contains the following columns:

Table 7-11: Order History Columns

Column	Description
Sale	The transaction number for the sale.
Sale Date	The date of the order.
Deliv Date	The date the order was scheduled for delivery.
Delivery	The delivery status.

Table 7-11: Order History Columns (cont.)

Column	Description
Recipient/Reference	The name of the recipient for the order.
Sale Type	The type of sale. This may be payments (for payments received), debit memos, credit memos, carry out, pickup, etc. NOTE Finance charges are also included in the order history. However, if you attempt to double-click the finance charge to view it, a message appears indicating FTD Mercury is unable to display that type of ticket.
Pay Type	The type of payment. This may be cash, house, credit card, etc.
Total	The total cost of the transaction.
Amt Paid	The amount paid on this transaction.

In the Order History tab, the following color coding is used:

Table 7-12: Customer Account Balance Detail Window Legend

Format	Description
Yellow Highlight	Cancelled tickets
Light Blue Highlight	Sales with associated refunds

If you are configured as a multi-store environment, you can select an individual store from the Store Name list to filter orders by a specific store. Select All Stores to show the entire order history regardless of store.

You can mark orders delivered in this window by clicking the Delivery column, then selecting a Delivery Code. Click Print Order History to print a list of this customer's orders.

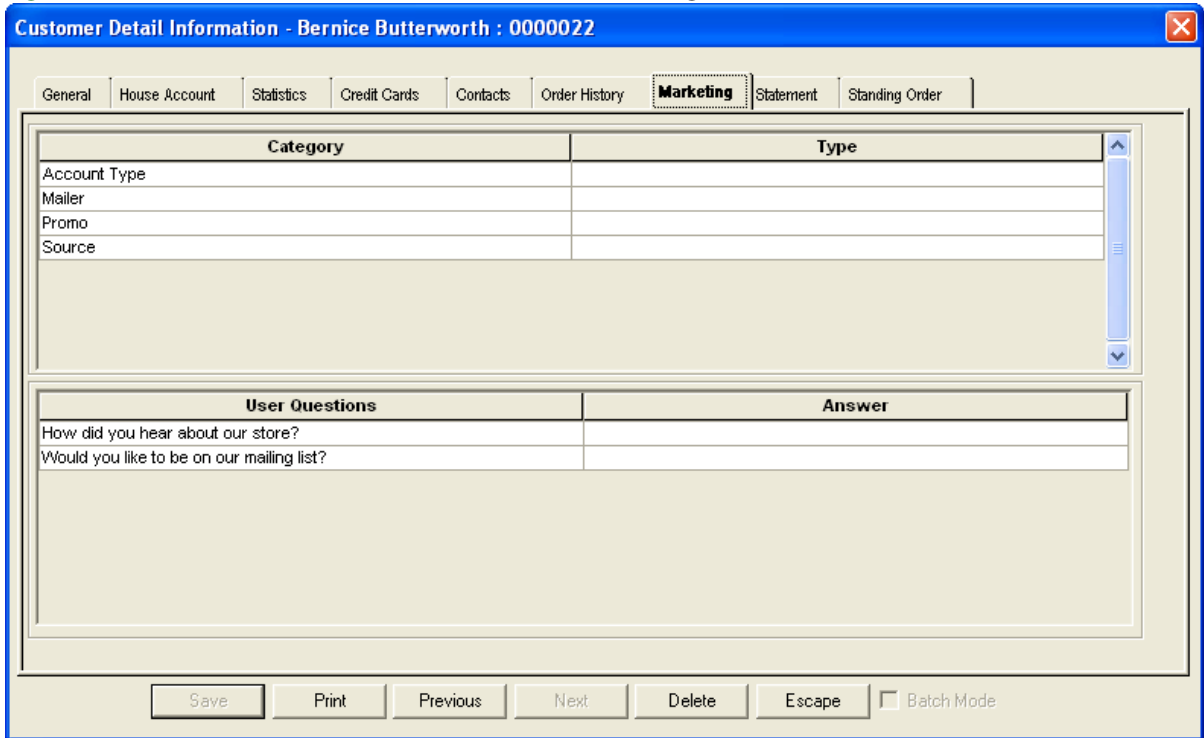
NOTE Finance charges are included on the report generated from Print Order History.

Marketing Tab

The Marketing tab of the Customer Detail Information window allows you to select the marketing categories for each of your customers. Selecting these categories will help you better market to your customers; for example, you can print reports and generate letters for specific types of customers (by account type, age group, birthday month, etc.).

NOTE You can set up marketing categories in Mercury Administration.

Figure 7-10: Customer Detail Information Window Marketing Tab



If this window appears blank (there aren't any categories or user questions listed), then you should first go into the Mercury Administration program to create your categories and questions. Both of these options are set up in the Accounting folder in Mercury Administration. Marketing categories are set up in the Marketing screen, and user questions are set up in the Questions screen.

If your categories and/or user questions are already set up in Mercury Administration, follow the instructions below to set these up for the customer.

TASK To select marketing categories:

- 1 For the first category listed, click the **Type** field with your mouse so that a down arrow appears.
- 2 Click the down arrow with your mouse and select the type from the drop-down list.

TASK To answer a user question:

Click in the **Answer** column so that a cursor appears and type the answer to the question.

When you are finished, click the Save button.

Statement Tab

The Statement tab of the Customer Detail Information window allows you to view statements that have been generated for the customer.

Figure 7-11: Customer Detail Information Window Statement Tab

Customer Detail Information - Bernice Butterworth : 000022

General House Account Statistics Credit Cards Contacts Order History Marketing **Statement** Standing Order

Statement Date	Generated Date	Current	Over 30	Over 60	Over 90	Over 120	Total Due	Store
04/15/2008	04/14/2008 13:19	\$ 166.85	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 166.85	Margie's Flowers
04/14/2008	04/14/2008 12:07	\$ 166.85	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 166.85	Margie's Flowers
04/03/2008	04/03/2008 15:20	\$ 102.96	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 102.96	Margie's Flowers
04/01/2008	04/01/2008 12:14	\$ 68.89	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 68.89	Margie's Flowers

More Output Statement View Print Statement List New Statement

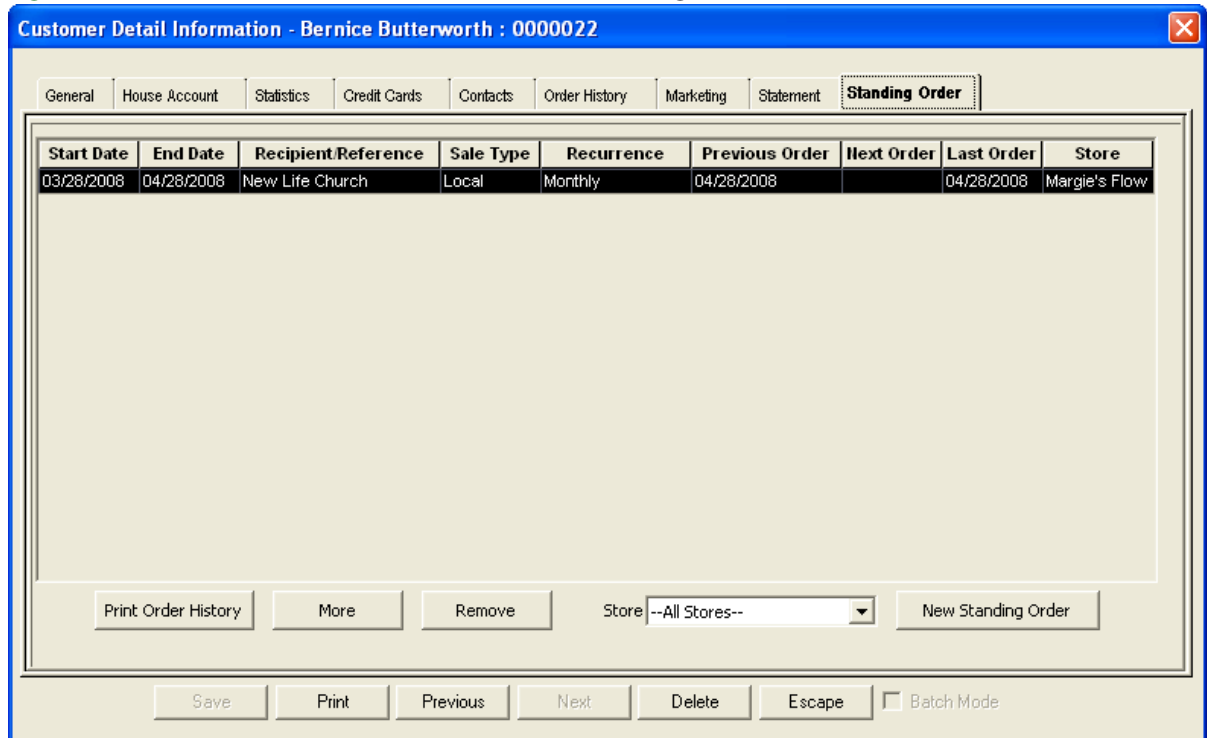
Save Print Previous Next Delete Escape Batch Mode

From this window, you can:

- » Click the View button to view detail for the highlighted statement.
- » Click the Output Statement button to print/fax/e-mail the highlighted statement.
- » Click Print Statement List to print all statements for the customer.
- » Click New Statement to generate a new statement for the customer.

Standing Order Tab

Figure 7-12: Customer Detail Information Window Standing Order Tab



The Standing Order Tab in the Customer Detail Information window allows you to perform the following tasks:

- » View existing standing order templates associated with a customer (see [Standing Order Tab Grid](#) below)
- » Print a list of standing order templates associated with a customer (see [Printing a List of Standing Order Templates](#) on page 9-64)
- » Create a new standing order template (see [Creating Standing Order Templates](#) on page 9-61)
- » Edit an existing standing order template (see [Editing Existing Standing Order Templates](#) on page 9-62)
- » Deleting an upcoming order based on a standing order template (see [Deleting Upcoming Orders to be Generated by a Standing Order Template](#) on page 9-63)
- » Remove all upcoming orders based on a standing order template (see [Removing All Upcoming Orders Based on a Standing Order Template](#) on page 9-63)
- » Delete an existing standing order template (see [Deleting Existing Standing Order Templates](#) on page 9-63)

Standing Order Tab Grid

The main area of the Standing Order tab is a grid containing a list of each standing order associated with the customer. You can double-click on any of these templates to display additional

information, including the products included in orders generated from the template. Each row in the grid represents a separate standing order template, and includes the following information

Table 7-13: Standing Order Tab Columns

Column	Description
Start Date	The start date of the standing order, and the date on which the first order was (or is to be) delivered, as defined in the Standing Order Scheduler window. The grid is sorted by this column.
End Date	The date at which the standing order template will expire, as defined in the Standing Order Scheduler window. This may be different than the Last Order.
Recipient/Reference	The recipient of the orders generated by this standing order template, as defined by the Recipient Name field in Order Entry.
Sale Type	The delivery type associated with the delivery zone selected in Order Entry. This could be Wire, Pickup, Local, or Carry Out. If the standing order template does not contain all required information for FTD Mercury to generate orders from this template, the Sale Type column will be Incomplete.
Recurrence	The frequency at which the order recurs. This does not display any additional dates added to the standing order template, nor any dates removed.
Previous Order	The delivery date of the previous order generated by this standing order template.
Next Order	The date the next order generated by the standing order template is scheduled for delivery.
Last Order	The delivery date of the final order (to be) generated by this template.
Store	The store at which the standing order template was created.

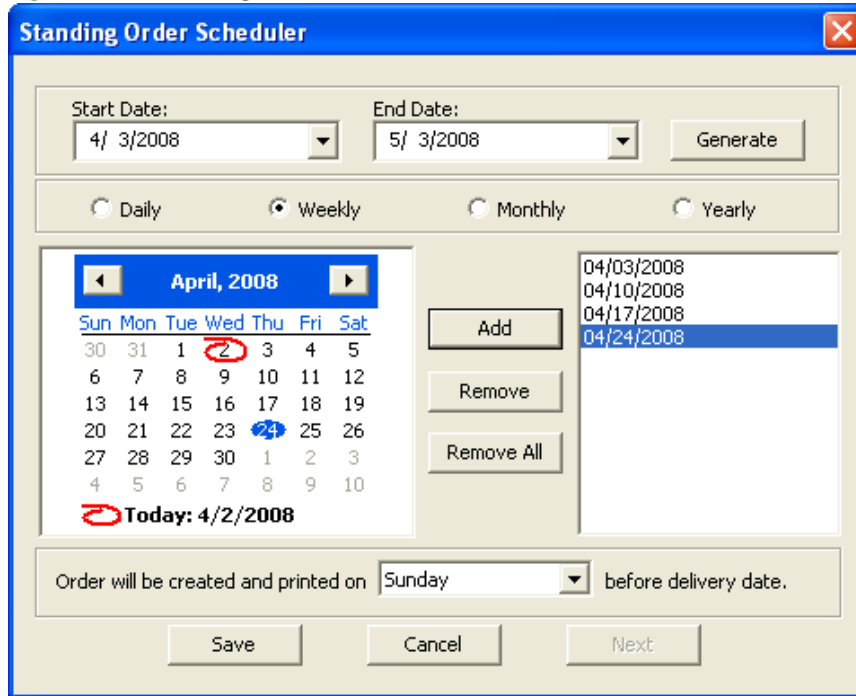
Below the grid, if you select a store from the Store Name list, you can see all standing order templates associated with the customer that were created for the selected store. You can also select All Stores to see a comprehensive list of all standing order templates associated with the customer. If there are many standing order templates, click More to display subsequent pages in the grid. When you click Print Order, FTD Mercury prints the list of the standing order templates displayed in the grid.

Click New Standing Order to create a new standing order template. When you double-click on an existing standing order template, the Standing Order Scheduler window opens.

Standing Order Scheduler Window

The Standing Order Scheduler window opens when you create a new standing order template or edit an existing one. You can configure the schedule for the standing order template (and, therefore, the schedule for when orders are generated from the template) from this window. After setting schedule information, you must click Save prior to entering order information. Once you click Save, if you click Next, you are taken to the Order Entry screen, from which you can configure product and delivery information.

Figure 7-13: Standing Order Scheduler Window



This window contains the following settings

Table 7-14: Standing Order Scheduler Window Settings

Setting	Description
Start Date	Select the date you want as the first delivery date as the Start Date. Once you have created a standing order template and an order has been generated from it, you cannot change Start Date. The default start date is one day after the current date; you cannot create a standing order that starts on or before the current date.
End Date	Select the date beyond which you do not want any additional orders created from this standing order template. This end date is not necessarily the final delivery date. If you change this date after the Delivery Date list has been populated, clicking the Generate button will refresh the list with the new delivery dates, and will also delete any manual delivery dates you may have entered.
Recurrence	Select the rate at which the standing order will recur. You can select from the following choices: <ul style="list-style-type: none"> » Daily—orders generated from this template will begin on the start date and continue daily up to and including the end date. » Weekly—orders generated from this template will begin on the start date, recur every seven days up to the end date. If the end date falls on the same day of the week as the start date, the end date will be included as the final delivery date; otherwise, the end date will not be included. » Monthly—orders generated from this template will begin on the start date and recur monthly on the same date up to and including the end date (unless the end date occurs in the same month and year as the start date). If the date in the month the order will be generated does not occur in a month (the 29th, 30th, or 31st in some months), the delivery date will be the final date of the month. » Yearly—orders generated from this template will begin on the start date and recur annually on the same date. If the start date was February 29th of a leap year, non-leap year delivery dates will be February 28th.

Table 7-14: Standing Order Scheduler Window Settings (cont.)

Setting	Description
Delivery Dates	This list contains the delivery dates for orders generated from this standing order template, based on the schedule you selected. You can add or remove dates as necessary to customize you schedule. This list is sorted in ascending order, and is refreshed every time you add or remove a delivery date.
Order Creation Day	<p>Select the day on which the order will be created and printed. The order will be created and printed on the day of the week you select immediately prior to the day of delivery. For example, if you order is scheduled for a Saturday delivery, and your order creation day is Saturday, your order will be created on the Saturday prior to the delivery date (seven days in advance). If your order is scheduled for Saturday delivery and your order creation day is Friday, your order will be created on the Friday immediately before the delivery date (one day in advance).</p> <p>FTD Mercury checks for orders to be created and printed nightly and after each reboot. If FTD Mercury cannot create an order from the standing order template, it will display a message with details.</p> <p>For specifics on number of days of lead time, see the Lead Time section below.</p>

Lead Time

Depending on the day you select for order creation and the day of delivery, you will have different lead times for order creation and printing. It will always be at least one day prior to the delivery date, and can be as many as seven days prior. The following chart shows you the number of days of lead time depending on the day of the week for delivery and the day chosen as the order creation day:

Table 7-15: Days of Lead Time Based on Day of Delivery and Order Creation Day

		Order Creation Day						
		Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Delivery Day	Sunday	7	6	5	4	3	2	1
	Monday	1	7	6	5	4	3	2
	Tuesday	2	1	7	6	5	4	3
	Wednesday	3	2	1	7	6	5	4
	Thursday	4	3	2	1	7	6	5
	Friday	5	4	3	2	1	7	6
	Saturday	6	5	4	3	2	1	7

If you create a standing order template with a start date of tomorrow (the first possible start date), the order invoice will print overnight the first time, regardless of when the normal order generation day is scheduled.

Adding New Customers

Figure 7-14: Adding a New Customer to Your System

TASK To add a customer to your customer database:

- 1 On the **FTD Mercury Main Menu**, click **New Customer**. The **Customer Detail Information** window opens with the **General** tab displayed.
- 2 In the **Customer** area of the **General** tab, type the customer's name. For a non-house account, this is the name of the person or business that is placing the order. If this is a house account, this should be the name of the person or company who is responsible for payment on the account. The name should be entered in a consistent format among all customers. For example, you may want to enter individuals in a "first name last name" format and enter businesses by their official names.
- 3 In the **Sort Name Key** field, enter the name by which FTD Mercury will sort this customer's name for reports and statements. By default, this field sorts according to the "last name, first name" format, but you may enter a different sort name if you prefer.
- 4 In the **Address Information** area, click the arrow and select an address type and type the customer's address in the large text box. If the customer is opening up a house account, be sure to record the address where the customer's bills are sent. Statements print with the billing address. If this is the customer's billing address, make sure the **Billing Address** check box is checked.

NOTE The address types are maintained in the Mercury Administration file. For information, see [Address Types Screen](#) on page 24–69.

- 5 In the **Contact Information** area, click the arrow and select a phone number type and type the phone number of the customer in the text box (you can use punctuation such as parenthesis or dashes in the phone number). If this is the primary number where the customer may be reached, make sure **Primary Phone** is checked. You can enter the customer's email address by using the drop-down field or by typing it in the **E-mail Address** field.

NOTE

The phone number types are maintained in the Mercury Administration program. For information, see [Phone Types Screen](#) on page 24–75.

- 6 In the **Tax Details** area, if the customer is a non-profit organization and/or you want to designate this customer as tax exempt, click the **Tax Exempt** check box so a check mark appears and type the exemption code in the **Exempt Code** field. Refer to the valid tax codes for your store.
- 7 If this customer is receiving a discount on purchases, type the discount percentage in the **Discount Percent** field. Type the percentage number without the percent sign. The percentage entered here is deducted automatically from the PRODUCT total each time the customer places an order (discounts are not applied automatically to fees, etc. but you can enter manual discounts in Order Entry and Point of Sale). Setting the percentage to zero indicates that no automatic discounts apply. Discounts can always be overridden when a transaction is entered. Discounts only apply to the product amount; they do not apply to fees (such a delivery, relay, and service fees). To apply a discount to a fee in Order Entry or Point of Sale, you must add the discount manually.
- 8 In the **Referral Code** field, click the arrow and select the way in which this customer learned about your store.
- 9 Check any of the following check boxes to make them true:
 - » **Delivery Confirmation** - When checked, the **Delivery Confirmation** check box indicates that you want to send delivery confirmation email messages to this customer. Delivery confirmation email messages allow you to inform your customers that an order has been sent (outgoing) or delivered (local delivery). Checking this option activates the delivery confirmation fields in Order Entry and Point of Sale when entering an order for this customer.
 - » **Include in direct marketing** - When checked, the **Include In Direct Mail Marketing** check box indicates that you want to send marketing letters or postcards to this customer. Clearing this option excludes this customer from all of your direct mail marketing campaigns in the Mercury Marketing application AND from any marketing letters that you print from the Mercury Forms templates folder.
 - » **Include in e-mail marketing** - When checked, the **Include In E-Mail Marketing** check box indicates that you want to send marketing email messages to this customer. Clearing this option excludes this customer from all of your email marketing campaigns in the Mercury Marketing application.
 - » **Active Status** - makes this customer available for customer searches. Customers can be deleted from the database as long as they have not placed any orders.
 - » You can make a customer inactive by clicking the **Active Status** check box so that a check mark does not appear. The customer will remain in the database for lookups, but that account cannot charge orders in Order Entry or Point of Sale. You will be informed the customer is not active if you try to select this customer in either the Order Entry or Point of Sale window..
 - » **Do not Purge** - protects the customer from being deleted when you purge customers.
- 10 If you have multiple stores, the **Store of Origin** field allows you to specify where the customer originated. By default the logged in store is highlighted. To select a different store, highlight the store name.
- 11 Click **Notes** to enter any additional customer information to the account. When information is saved in this area, a red check mark appears over the **Notes** button.
- 12 Click the **Batch Mode** check box so a check mark appears if you wish to add several new customers.
- 13 Click **Save**.

Customer Search

If you want to view or change customer information, such as house account information, marketing permission, the customer's address, the customer's phone number, or standing orders associated with the customer, you must first perform a customer search.

Searching for Customers

There are two types of customer searches you can perform in FTD Mercury: customer searches to populate Order Entry or Point of Sale windows, and general customer searches.

From the FTD Mercury Main Menu

TASK To perform a Customer Search from the FTD Mercury Main Menu:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Customer**. The **Customer Search** window opens.
- 2 Select the parameter(s) you are searching by and enter the appropriate information in the associated field(s).

TIP If you enter a % symbol as a wildcard in the Customer Name field, it will return all customers in your database.

- 3 Click **Search**.
- 4 Customers matching your search parameter(s) appear in the results list. If you entered more than one parameter for the search, customers must match all parameters to appear in the results list. Double-click on a customer to open the **Customer Detail Information** window for that customer.

From the Order Entry or Point of Sale Windows

You can also search for customers from the **Order Entry** and **Point of Sale** windows.

TASK To perform a Customer Search from Order Entry or Point of Sale:

- 1 Open the **Order Entry** or **Point of Sale** window.
- 2 In the **Customer** field, enter all or part of the customer's name, the customer's phone number, or the customer's account ID and press the **TAB** key.
- 3 If only one customer matches, information for the customer will automatically appear in the window. If more than one possible match exists, the **Customer Search** window opens with possible matches. You can then select the correct customer and click **Select** to populate the customer's information in the **Order Entry** or **Point of Sale** window.

Customer Search Window

The Customer Search window allows you to locate customers in your customer database. You can search by several criteria, and FTD Mercury displays the matching customers based on the criteria. Once you have entered your search criteria, click **Search** to perform the search.

Figure 7-15: Customer Search Window

The screenshot shows a 'Customer Search' window with a search parameters section and a results table. The search parameters section includes checkboxes for 'Customer Name', 'Account ID', 'Phone', 'City/State', 'Email Address', 'Credit Card #', 'Recipient Name', 'Contact Name', 'Contact Phone', and 'Customers With Standing Orders'. A 'Search' button is located to the right of the search parameters. The results table has columns for Account, Customer Name, Address, City, State, Postal Code, Phone, Aging, and Balance. Two rows of data are visible in the table.

Account	Customer Name	Address	City	State	Postal Code	Phone	Aging	Balance
BLM	Bloomlink Wire Service	1600 Stewart Ave	WESTBURY	NY	11590		0	0.00
0000022	Bernice Butterworth	832 Worcester Avenue	OAK PARK	IL	60304	203-123-4566	30	449.36

Search Parameters Area

In the Search Parameters area, you can select the criteria for your customer search. You must select at least one parameter; the Search button is disabled if you do not select at least one parameter. If you select multiple search parameters, a customer must match all of the criteria to appear in the results list.

You can search by the following criteria:

Table 7-16: Customer Search Parameters

Parameter	Description
Customer Name	<p>If the value entered matches the beginning characters of a customer's name or sort field value, it is considered a match and the customer's information will be included in the results list.</p> <hr/> <p>TIP: You can also use a % symbol in this field to return all customers in your database.</p>
Account ID	<p>If the value entered matches a customer account ID, that customer's information will be displayed in the results list. The value will be considered a match if it is the exact account ID, or if it is the account ID for a customer excluding any leading zeros.</p>
Recipient Name	<p>If the value entered matches the beginning characters of a customer's recipient's first or last name, it is considered a match and the customer's information will be included in the results list.</p>

Table 7-16: Customer Search Parameters (cont.)

Parameter	Description
Contact Name	If the value entered matches the beginning characters of a customer's contact's first or last name, it is considered a match and the customer's information will be included in the results list.
Email Address	If the value entered matches any portion of a customer's email address, it is considered a match and the customer's information will be included in the results list. For example, if you enter jane in the Email Address field, jane@somewhere.net and jane@nowhere.net will be matches, as will janet@somewhere.net. Likewise, if you enter somewhere.net as the search parameter, jane@somewhere.net, janet@somewhere.net, and steve@somewhere.net will all be matches.
City/State or City/Province	When using the city/state or city/province for a customer search, you must enter the city name and select the state or province. To be considered a match, the value you enter for the city must match the beginning of the customer's city in the selected state. (That is, if you search for Portland, ME, only customers in Portland, ME will be a match, and not customers in Portland, OR.) The state of the store you are currently logged in to is by default the selected state.
Phone Number	If the value you enter matches the beginning of the customer's primary phone number (area code, prefix, or entire phone number), it is considered a match and the customer's information is included in the search results list. Special characters (such as parentheses, periods, or dashes) are ignored during the search.
Credit Card Number	If the value you enter is either an exact match for a credit card on file, or if the value you enter is four digits and it matches the last four digits of a credit card on file, the customer's information is returned in the results list.
Contact Phone Number	If the value you enter matches the beginning of a customer's contact's area code, prefix, or phone number, it is considered a match and the customer's information is included in the search results list. Special characters (such as parentheses, periods, or dashes) are ignored during the search.
Customers with Standing Orders	If you select this option, customers with Standing Orders will be included in the results list.

TIP Ensure the check box is selected prior to clicking Search.

Results List

If one or more customers matches your search criteria, the matching customer(s) appear in the results list below the Search Parameters area. Information about each customer is displayed on an individual line, and includes the following:

- » Account ID (if one has been assigned to the customer)
- » Customer name
- » Customer notes indicator (if notes are associated with the customer)
- » Billing address
- » City
- » State or province

- » ZIP/postal code
- » Primary phone number
- » Aging information
- » Current balance

Double-click on a customer in the results list to view complete information in the Customer Detail Information window.

Customer Notes

If there are notes for a customer in the results list, a note icon will appear after the customer's name. Click on the note icon to display the Note Entry window, where you can read or edit customer notes. If there are no customer notes, double-click on the customer and add customer notes from the Customer Detail Information window.

Colors in Customer Search Results

When the Customer Search returns results, inactive accounts are displayed in yellow. Past due accounts (that is, accounts where the number of days late exceeds the grace period for the customer) are displayed in red.

Table 7-17: Customer Search Window Legend

Format	Description
Red Highlight	Past due accounts (that is, accounts where the number of days late exceeds the grace period for the customer).
Yellow Highlight	Inactive accounts. (Inactive customers cannot charge orders in Point of Sale or Order Entry.)
Normal Text	Active accounts that are current.

Buttons

There are three buttons at the bottom of the Customer Search window:

- » **More**—if there are more than 20 customers who match your search criteria, click this button to refresh the window to display the next 20 customers.
- » **Add**—opens the Customer Detail Information window, from which you can add a new customer to your database.
- » **Close**—closes the Customer Search window.

Setting Up House Accounts

House accounts allow customers to run a monthly balance at your store, so they may charge products and services and receive statements. You can use the Mercury Administration to set defaults for house accounts to reduce employee input time and maintain a consistent billing pattern. See [HouseAccount Screen](#) on page 24–3 for more information.

NOTE

If you do not have the Accounts Receivable module, you can set up a house account for a customer but you cannot charge orders to the account or print statements.

TASK **To establish a house account:**

- 1 For a new customer, On the **FTD Mercury Main Menu**, click **New Customer**. Once you enter information into the **General** tab, click the **House Account** tab.
For an established customer, on the **FTD Mercury Main Menu**, in the **Search** area, click **Customer** and perform a search to open the **Customer Detail Information** window already set up for this customer. Then, click the **House Account** tab.
- 2 In the **Account ID** field, type any series of numbers or letters to identify the account. A suggested format is the first five letters of the last name followed by the first two letters of the first name (for example, for Lisa Johnson, type JOHNSLI). Or, click **Auto** if you wish FTD Mercury to create a numerical account ID for you automatically.
- 3 In the **Accounting Type** field, click the arrow and select an appropriate type for this account. Customers with **Balance Forward** accounts receive statements that show running unpaid balances. As payments are made, the payment amount is applied to the oldest invoice. **Open Item** accounts are used by companies that pay by invoices (or other customers that prefer to do so). As each payment is made, it is applied to an individual ticket.
- 4 In the **Credit Limit** field, enter the maximum dollar amount of credit allowed for the customer's purchases. While entering an order in Order Entry, FTD Mercury warns you if this customer is exceeding the credit limit you have set.
- 5 In the **Billing Cycle** field, click the arrow and select the frequency at which you wish this customer to be billed.
- 6 Click the arrow and select a default method of payment in the **Default Payment** field. Typically, this is **Credit**.
- 7 In the **Annual Finance** field, type the annual finance charge percentage you want the customer to be charged if the account is past due. Finance charges are applied per billing cycle. The finance charge percentage that appears on the statement is divided by 12.
- 8 In the **Minimum Finance Charge** field, enter the minimum dollar amount you want added to overdue accounts. The system selects either the finance charge percentage in the **Finance Charge** field or the amount you enter here, whichever is greater.

NOTE

- Finance charges are only applied when you check the Generate Finance Charges check box in the Generate Statements window.
- 9 In the **Finance Grace Period** field, click the arrow and select the number of days to allow before finance charges are applied.
 - 10 Indicate whether the customer want to receive statements by mail, email, or fax (or any combination of these methods).
 - » **Print Statements** to print statements to mail to the customer.
 - » **Print Invoices** to print invoices for the customer when you generate statements.
 - » **Fax Statements** to automatically send a fax statement to the customer when statements are generated.
 - » **Email Statements** to automatically send an email statement to the customer when statements are generated.
 - 11 Click **Print Dunning Messages** so that a check mark appears if you want to print a dunning message at the bottom of each customer statement. Dunning messages are reminders of when payment is due, and are maintained in the Mercury Administration program.
 - 12 In the **Terms on Account** field, type any text that you want to appear on the statement for this particular customer.
 - 13 Click **Save**.

Viewing Customer Statistics

Customer statistics consist of sale and house account histories. Information such as a customer's average sale, current balance, year-to-date sales and sales by occasion type are displayed (for sales processed in the Order Entry, Point of Sale, and Accounts Receivable modules). These statistics provide an overall glimpse of this customer's buying patterns so you may gear your marketing to those patterns.

TASK To access customer statistics:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Customer**.
- 2 Perform a customer search for the customer.
- 3 Double-click on the customer's name in the results list. The **Customer Detail Information** window opens for this customer.
- 4 Click the **Statistics** tab.
- 5 Once you have finished viewing statistics, click **Escape** to close the window.

Maintaining Credit Card Information

Each credit card the customer has used in Order Entry and Point of Sale is listed, along with the name on the card, its type, account number, and expiration date. This tab can be used to add and remove credit card information.

NOTE Only credit cards that have been processed through FTD Mercury display on this screen. If you receive an incoming order from FOL or FAH, the credit card information does not display on this screen for the customer until you process the transaction.

TASK To locate a credit card used by a customer in your system:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Customer** and perform a Customer Search.
- 2 When found, double-click on the customer's name in the list to open the **Customer Detail Information** window.
- 3 Click the **Credit Cards** tab.

Adding Credit Cards

TASK To add a credit card:

- 1 With the **Customer Detail Information** window open, click the **Credit Cards** tab.
- 2 Click **Add**. The **Customer Credit Card** window opens.
- 3 In the **Name** field, type the name of the cardholder.
- 4 In the **Number** field, type the credit card number displayed on the front of the card. The **Type** field fills in automatically.
- 5 In the **Expiration date** field, highlight the month and click the up and down arrows until the expiration month matches the expiration month on the front of the card. Do the same for the year.
- 6 Click **Save**.
- 7 Click **Escape** to close the window and return to the **Credit Cards** tab of the **Customer Detail Information** window.

Removing Credit Cards

TASK To remove a credit card:

- 1 In the list, select the credit card you wish to remove.
- 2 Click **Remove**.
- 3 Click **Save**.

Editing Credit Cards

TASK To edit a credit card:

- 1 Double-click on the credit card in the list to display a pop up window.
- 2 Make changes to the credit card record in the pop up window.
- 3 Click **Save**.

Customer Contacts

At some point, you may want to add the names of additional people (contacts) that may charge to a customer's house account. For example, you may want to add employee names if this customer is a business, or add family members' names if this customer is an individual.

NOTE Names that you type into the Ordered By field in Order Entry Point of Sale are automatically added to this list.

TASK To add additional contacts to a customer account:

- 1 For a new customer, click **New Customer** in the Main Menu. Once you enter information into the **General** tab, click the **Contacts** tab.
For an established customer, on the **FTD Mercury Main Menu**, in the **Search** area, click **Customer** and perform a Customer Search to open the **Customer Detail Information** window already set up for this customer. Then, click the **Contacts** tab.
- 2 To add a new contact, click **Add**, then click in the text cell and type a new contact record manually.
- 3 Click **Save**.
- 4 Click **Escape** to close the window.

The Contacts tab of the Customer Detail Information window acts as a notepad; although the system does not add these names to your customer database, your employees can check this area if someone is attempting to charge to a house account that is not under this person's name.

Viewing a Customer's Order History

FTD Mercury allows you to access a customer's history of orders, charges, and payments (in the Order Entry, Point of Sale, and Accounts Receivable modules).

TASK To view a customer's order history:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Customer** and perform a **Customer Search**.
- 2 Double-click on a name in the list to open the **Customer Detail Information** window already set up for this customer.
- 3 Click the **Order History** tab.

By default, orders from all stores display. To view orders only from a particular store, change the store name in the Store Name field and the screen refreshes automatically.

To view detail information for any item in the list, double-click on the item or press the **SPACEBAR** when the item is highlighted. Click Print Order History to print the list of this customer's orders. Click Escape to close the window.

Marking Orders Delivered/Not Delivered

Delivery codes are created in Mercury Administration, and are used to indicate the delivery status of an order (see [Delivery Code Screen](#) on page 24–40 to learn how to create delivery codes). You can create delivery codes that mark orders Delivered (for example, "Left on Porch," "Delivered to Recipient," etc.) or Not Delivered (for example, "Not at Home," or "Discharged from Hospital"). When you click the Delivery column, a down arrow displays. Here you can click the arrow to access a list of delivery codes:

Figure 7-16: Customer Order History – Marking Orders Delivered

Customer Detail Information - Bernice Butterworth : 0000022

General | House Account | Statistics | Credit Cards | Contacts | **Order History** | Marketing | Statement | Standing Order

Sale	Sale Date	Deliv Date	Delivery	Recipient Ref	Sale Type	Pay Type	Total	Amt Paid
000520.1	05/05/2008	05/05/2008		New Life Church	Local	House - OE	\$ 70.84	\$ 0.00
000519.1	05/05/2008	05/05/2008		New Life Church	Local	House - OE	\$ 70.84	\$ 0.00
000515.1	04/28/2008	04/29/2008		New Life Church	Local	House - OE	\$ 68.89	\$ 0.00
000515.2	04/28/2008	04/29/2008		New Life Church	Local	House - OE	\$ 68.89	\$ 0.00
000514.1	04/21/2008	04/21/2008			Carry Out	House - OE	\$ 10.00	\$ 0.00
000473.1	04/21/2008	04/21/2008		New Life Church	Local	House - OE	\$ 63.89	\$ 0.00
000477.1	04/08/2008	04/08/2008	▼	New Life Church	Carry Out	House - OE	\$ 63.89	\$ 0.00
000470.1	04/01/2008	04/01/2008	Delivered		Carry Out	House - OE	\$ 34.07	\$ 0.00
000446.1	03/28/2008	03/28/2008			Local	House - OE	\$ 68.89	\$ 0.00

Print Order History | More | Store Name: --All Stores--

Save | Print | Previous | Next | Delete | Escape | Batch Mode

Selecting a Delivered delivery code (for example, "Left on Porch") marks the order Delivered. Selecting a Not Delivered delivery code (for example, "Not at Home") marks the order as Not Delivered.

If you have the Mercury Delivery module, you most likely maintain the delivery status of your orders in that application. However if you do want to mark orders Delivered or Not Delivered in Order History, the changes that you make in Order History automatically update the delivery status of orders in the Mercury Delivery application (and vice versa).

If you send delivery confirmation email messages, marking an order Delivered sends the email at that time (or if you specified a LATER time in Mercury Administration, it sends it at that time).

Customer Marketing

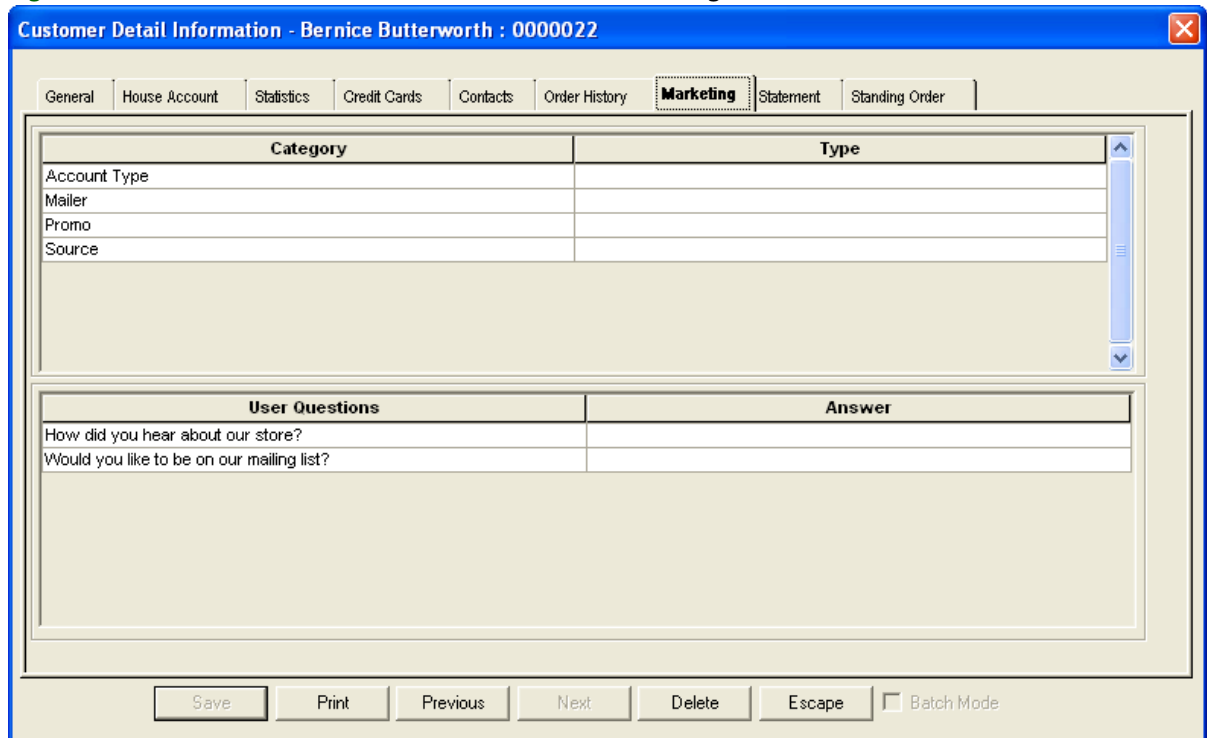
The Marketing tab allows you assign marketing categories to your customers. Marketing categories help you market to your customers more efficiently. For example, you may want to send marketing letters to customers with a birthday in February, or send a list of specials to your business accounts.

You have the opportunity to specify certain marketing categories when printing mailing labels, occasion code letters, and all types of customer lists. This way you do not have to print customer information for all customers; you can specify customers that only fall into certain marketing categories. This section teaches you how to assign marketing categories to your customers.

NOTE Marketing categories are set up in Mercury Administration. See [Marketing Screen](#) on page 24–21 for more information.

For a new customer, click New Customer in the Main Menu. Once you enter information into the General tab, click the Marketing tab. For an established customer, on the FTD Mercury Main Menu, in the Search area, click Customer and perform a Customer Search to open the Customer Detail Information window already set up for this customer. Then, click the Marketing tab.

Figure 7-17: Customer Detail Information Window – Marketing Tab



From this tab you can select category types for the customer. To select a category type, click in the Type column for the category and a drop down menu appears. Click your selection from the drop down menu.

If you set up user questions in the Mercury Administration program (see [Questions Screen](#) on page 24–8), answer the user questions for the customer by clicking inside of the Answer columns and typing the customer’s response.

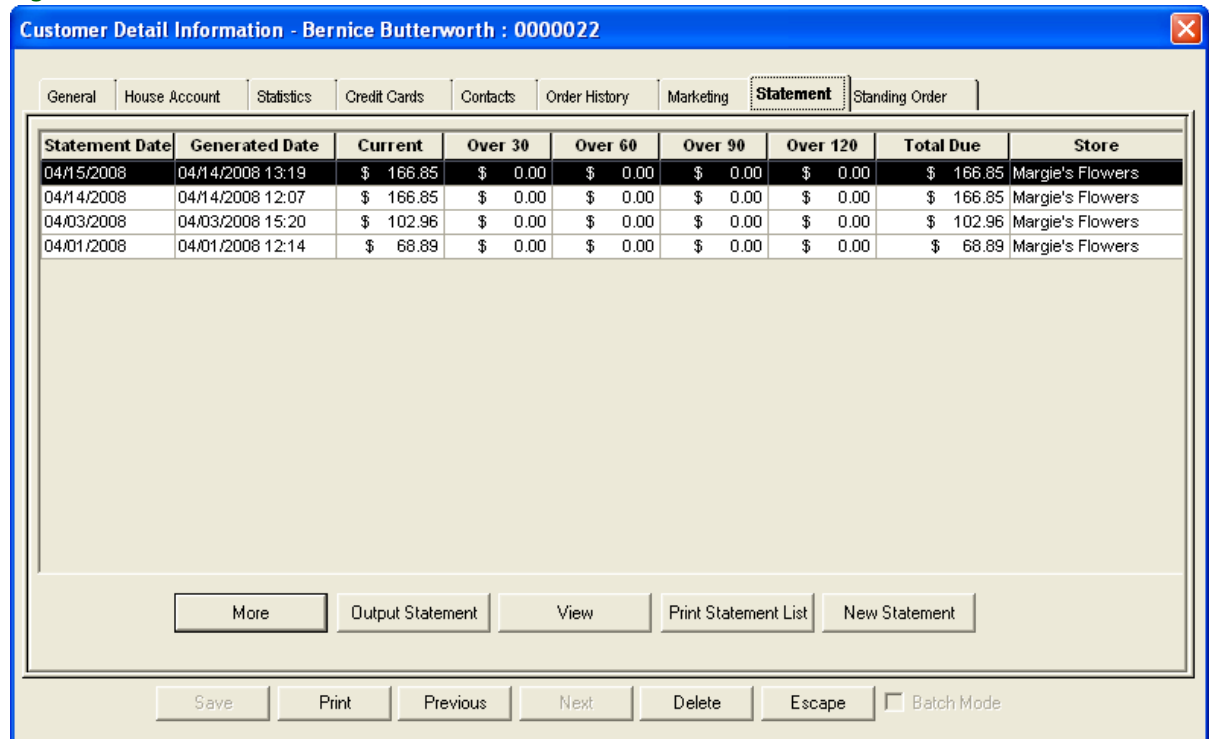
When you are finished selecting categories for the customer, click Save to save your changes.

Customer Statement History

The Statement tab allows you to view statements that have been generated for the customer. You can also re-fax, re-email, and re-print a statement from this window or generate a new statement.

On the FTD Mercury Main Menu, in the Search area, click Customer and perform a Customer Search to open the Customer Detail Information window already set up for this customer. Then, click the Statement tab.

Figure 7-18: Customer Detail Information Window – Statement Tab



From this tab, you can:

- » Click the Output Statement button to reprint/re-fax/re-email the highlighted statement.
- » Click the View button to view detail for the highlighted statement.
- » Click Print Statement List to print the list of statements.
- » Click New Statement to generate a new statement for the customer. This option works the same as the Statements button on the FTD Mercury Main Menu (see [Generating Statements](#) on page 18–12).

Wedding Accounts

Wedding accounts can be easily handled in Order Entry by first setting up a wedding house account for the customer, then charging the wedding arrangements to the house account. The customer can then make payments as needed.

NOTE

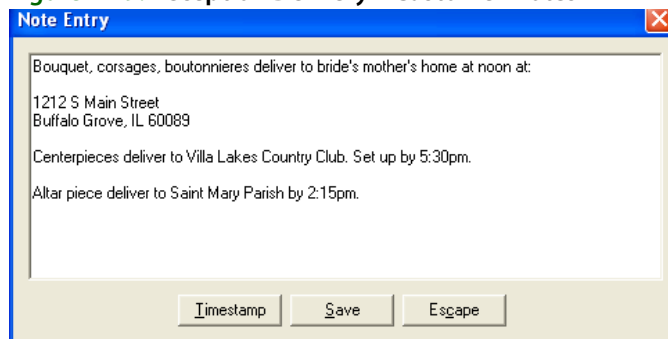
You do not maintain this account like a regular house account. Because the customer will most likely be making several payments over a span of months, you do not want to print statements for the customer or charge finance charges.

Creating a Wedding Account/Charging Products to Account

TASK To create a wedding account and charge products to the account:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**.
- 2 In the **Customer** field, enter a name for the house account. Generally, it is a good idea to name the account **Wedding** followed by the customer's last name (such as **Wedding Smith**). This way all of your wedding accounts can be accessed in **Customer Search** by typing in the word **wedding**.
- 3 Click **Add** to add the new house account. Complete the customer's general account information. (For assistance see [Adding New Customers](#) on page 7-24.)
- 4 Click the **House Account** tab. Complete the customer's house account information. Set up the account as an **Open Item Account**. Clear all of the options at the bottom of the window (**Print Statements, Fax Statements, Email Statements, and Print Dunning Messages**). (For assistance, see [Setting Up House Accounts](#) on page 7-29.)
- 5 Click **Save**. This takes you back to **Order Entry**.
- 6 Now you are ready to select all of the products that are being purchased for the wedding. In the product grid in the center of the window, select all of the wedding products and quantities (for assistance, see [Searching for Products](#) on page 8-3).
- 7 Next add the church delivery information. Add this information in the **Recipient** and **Delivery** sections of the screen.
- 8 Next add the reception delivery information. You can use **Special Instructions** or **Customer Notes** (click **Notes**):

Figure 7-19: Reception Delivery – Customer Notes



- 9 Click **Payment** to take payment on the order. Select **House** as the payment type and then click **Complete** to charge the transaction to the wedding account.

Figure 7-20: Placing Order on Wedding House Account

Marketing

Referral Code:

Payments

Type	Account Number	Exp Date	Name	Approval	Amount
House	0000024				\$ 1,282.79

Remove

Cardholder Present:

Sub. Total: \$ 1204.80
Sales Tax: \$ 77.99
Total: \$ 1282.79
Amount Paid: \$ 0.00
Balance Due: \$ 1282.79

AMOUNT DUE: \$ 1282.79

Complete Save Escape

Receiving Payments on Wedding Accounts

To receive a payment on the wedding account, take the payment just like a regular payment on an open item account. For assistance, see [Receiving Payments on House Accounts](#) on page 18–2.

TASK To receive a payment on a wedding account:

- 1 On the **Management** menu, click **Receive Payment**.
- 2 In the **Customer** field, enter the name of the account to locate the account.
- 3 Select the payment type, enter the payment information, and type the payment amount in the **Amount** column.
- 4 In the **This Payment** column, type the amount that you are allocating to each ticket.

Figure 7-21: Making a Payment on a Wedding Account

Receive Customer Payment On Account - New Payment

Customer

Wedding Smith

1339 BRANCHWOOD CIR
NAPERVILLE, IL 60563-0485
630-555-9801

Open Item Accounting
Total Balance Due: 0.00
Current Balance: 0.00
30 Day Balance: 0.00
60 Day Balance: 0.00
90 Day Balance: 0.00
120 Day Balance: 0.00

Payments

Type	Account Number	Exp Date	Name	Approval	Amount
Check			Daniel Smith		\$ 100.00
Cash					\$ 0.00

Remove Unallocated Credit: 0.00 Total Amount: 100.00

Allocation

Ticket	Date	Total	Unpaid	This Payment
0000019/1	08/06/05	503.86	503.86	\$ 100.00

Unallocated Balance: 0.00

Date: 7 / 1 /2005

Store Name: Karen's Flower Shop

Print Complete Escape Batch Mode

- 5 Click Complete.

Paying Off the Balance on Wedding Accounts

To pay off a house account balance, use the Receive Payment option as described in the section above, however take the payment for the balance of the account, and allocate the full amount to the ticket(s).

Figure 7-22: Paying Off a Wedding Account

Receive Customer Payment On Account - New Payment

Customer

Wedding Smith

1339 BRANCHWOOD CIR
NAPERVILLE, IL 60563-0485
630-555-9801

Open Item Accounting
Total Balance Due: 0.00
Current Balance: 0.00
30 Day Balance: 0.00
60 Day Balance: 0.00
90 Day Balance: 0.00
120 Day Balance: 0.00

Payments

Type	Account Number	Exp Date	Name	Approval	Amount
Check			Daniel Smith		\$ 100.00
Cash					\$ 0.00

Remove Unallocated Credit: 0.00 Total Amount: 100.00

Allocation

Ticket	Date	Total	Unpaid	This Payment
0000019/1	08/06/05	503.86	503.86	\$ 100.00

Unallocated Balance: 0.00

Date: 7 / 1 / 2005

Store Name: Karen's Flower Shop

Print Complete Escape Batch Mode

Customer Merge

Over time you may have multiple customer accounts that are actually for the same customer. This can occur if you migrated from another floral management system, or if you created a different account because you could not find the original account for a customer. Regardless, FTD Mercury provides you a way to merge multiple customer accounts into a single account using the Merge Customer utility.

Merging duplicate customer accounts provides the following benefits:

- » Single billing statements for customers.
- » Customers only receive one copy of marketing materials for marketing campaigns.
- » Combined customer purchase history.

Customer Merge is, by default, limited to users who are the Administrator employee type. You can change this from the Window Access screen in Mercury Administration (see [Window Access Screen](#) on page 24–57 for details).

When you merge customer accounts, notes, credit card information, phone numbers, contacts, recipients, and standing order information will be merged into the Master Account (if the Master Account does not already have this information).

Before You Merge Customers

Prior to merging customers, you need to know the following information:

- » The account into which you want to merge customers. This is the Master Account, and it will be retained after you perform the customer merge.
- » The customer accounts you want to merge into the Master Account. These accounts will be removed after the merge. You must ensure these accounts are not set to Do Not Purge; otherwise, they will not be merged.
- » If accounts you are merging into the Master Account have balances, the Master Account must also have a house account.

IMPORTANT FTD strongly recommends you do not merge customers during regular business hours when your clerks are taking orders. This eliminates the possibility a clerk will be taking an order for a customer account you are merging into another customer account.

What You Cannot Merge

Customer accounts you are merging into the Master Account cannot be marked as Do Not Purge (because these accounts will be purged following merging them into the Master Account). If you attempt to merge an account that is set as Do Not Purge, you will receive a warning message.

Additionally, you cannot merge wire service or cash accounts. These are special accounts, and will not show up when you search for accounts to merge.

Merging Customer Accounts

TASK To merge customer accounts:

- 1 In the **FTD Mercury Main Menu**, on the **Tools** menu, click **Merge Customers**. The **Customer Merge** window opens.
- 2 In the **Search Parameters** area, enter one or more search parameters you want to use to locate the customer account you want to use as the Master Account. Click **Search**.
- 3 From the results list, select the account you want to use as the Master Account and click **Select Master**. The Master Account will be identified in the center of the window.

IMPORTANT You can select an inactive account as the Master Account. Any accounts you merge into an inactive account will become inactive (based on the Master Account's inactive setting).

- 4 If accounts you want to merge into the Master Account are in the results list, select the box in the **Merge** column to mark them as ones you want to merge.
- 5 Click **Merge**.
- 6 When a window appears asking if you want to print a report of the master account and the customer accounts being merged, either select **Yes** or **No**.

IMPORTANT FTD strongly recommends you print this list for your records. Once the merge occurs, you will not be able to determine the accounts that were merged into the Master Account.

- 7 When a window appears asking if you want to continue with the merge, click **Yes**. Those accounts will be merged into the Master Account.
- 8 If you need to search for more customer accounts to merge into the Master Account, enter new search parameters and click **Search**. The Master Account will be retained. You can then click on the box in the Merge column for other accounts and click Merge to merge them into the selected Master Account.

- 9 When you have finished merging accounts into the Master Account, click **Close** to close the **Customer Merge** window.

Customer Merge Window

The Customer Merge window allows you to locate customers via a customer search, designate the master account, and then select the accounts to merge into the master account.

Figure 7-23: Customer Merge Window

The screenshot shows the 'Customer Merge' window with the following elements:

- Search Parameters:**
 - Customer Name
 - Account ID
 - Phone
 - City/State
 - Email Address
 - Credit Card #
 - Recipient Name
 - Contact Name
 - Contact Phone
 - Customers With Standing Orders
- Master Account:** Accounts will be merged into the master account.

0000009	HELGA TORRES	3675 BARIARD DRIVE #12	OCEANSIDE	CA	92056
---------	--------------	------------------------	-----------	----	-------
- Customer List:**

Merge	Account	Customer Name	Address	City	State	Postal Code	Phone	Balance
<input type="checkbox"/>		Tracey Johnson	434 West Harrison	OAK PARK	IL	60304	333-333-3133	0.00
<input checked="" type="checkbox"/>		HELENA TORRES	3113 Woodcreek Dr.	DOWNERS GROVE	IL	60515	555-123-1234	0.00
- Buttons:** Print List, Select Master, Merge, Close

Search Parameters Area

You can search for the Master Account and customer accounts to merge by several criteria in the Search Parameters area. You can search by:

- » Customer Name
- » Account ID
- » Phone Number
- » City and State/Province
- » Email Address
- » Credit Card Number
- » Recipient Name
- » Contact Name
- » Contact Phone Number
- » Customers with Standing Orders

If you search by more than one search parameter, a customer must match all parameters to be included in the results list.

Master Account Area

Once you have selected a Master Account into which you want to merge other customer accounts, it will be displayed in the Master Account area at the center of the Customer Merge window. The display includes the account number, the customer name, the customer street address, the customer's city and state/province, and their ZIP/postal code.

Results List

The results list displays customers who match the search criteria. Each row contains an account that matches, and includes the following information:

- » Account number
- » Customer Name
- » Customer Notes
- » Address
- » City
- » State/Province
- » ZIP/Postal Code
- » Phone Number
- » Current Balance

NOTE If you double-click on an account the Customer Detail Information window opens and displays information about the account.

Wire service and cash accounts will not appear in the results list, as they are special accounts and you cannot merge them into a Master Account. Inactive accounts, however, will appear in the results list (and will be color-coded yellow just as they are in Customer Search).

Colors in Search Results

In the results list, inactive accounts are displayed in yellow. Past due accounts (that is, accounts where the number of days late exceeds the grace period for the customer) are displayed in red.

Table 7-18: Customer Merge Window Legend

Format	Description
Red Highlight	Past due accounts (that is, accounts where the number of days late exceeds the grace period for the customer).
Yellow Highlight	Inactive accounts. (Customers who are inactive cannot charge in Order Entry or Point of Sale.)
Normal Text	Active accounts that are current.

Customer Purge

The Purge Customers utility allows you to delete inactive customers from your system. To purge customers, you specify the number of months of inactivity (the number of months since the customer has made a purchase).

Customers must meet the following criteria before they can be purged:

- » The customer account cannot have the Do Not Purge check box checked in the Customer Detail Information window.

- » The customer account cannot have a balance.
- » The customer account cannot have an unpaid ticket.
- » The customer account cannot be a default pay type account (such as “cash”) or a wire service account.
- » The customer account cannot have a sale with a Pending status.
- » The customer cannot have an active standing order template.

Purge Customers permanently deletes customers from your system, however the data for all purged customers is stored in a customer account named “Purged Customer.” The data is stored in this account so that it can still be used for reporting purposes.

The Purged Customer account:

- » is not associated with a store.
- » is an “inactive” account.
- » does not have a house account number.
- » can be viewed, but cannot be changed or deleted.
- » does not print on reports.

TASK To purge customers from your system:

- 1 On the **Tools** menu, click **Purge Customers**. The **Purge Customers** window opens.

NOTE

Only employees with the “Admin” job category can access this window. To learn how to change the job category for employees, see [Job Functions](#) on page 6–5.

- 2 Click the **Months since last purchase** check box so that a check mark appears and the field becomes active. In the text box, type the number of months that no purchases must be by this customer in order for the account to be deleted. All customers that have no purchases in at least this number of months are deleted. (You can type a number between 1 and 99).
- 3 If you want to protect house accounts from the deletion, click the **Do not purge customers with a House Account** check box so that a check mark appears.
- 4 If you want to only delete customers within specific customer marketing categories, click the **Customer Categories** check box so that a check mark appears. Then select the categories of the customers that you want to delete.

NOTE

Customer marketing categories are set up in Mercury Administration. If no categories are displayed in the box, it means that you have not set them up. See [Marketing Screen](#) on page 24–21 to learn how to set up marketing categories.

- 5 Click **Search**. Customers that meet your purge criteria display in the **Customers Selected for Purging** box. Here you can review each customer account individually (by double-clicking on the customer) and decide if it should be purged. The customer is not purged at this point, you are just selecting the accounts to be purged.
- 6 In the **Purge** column, all accounts are marked to be purged. To exclude a customer from the purge, click the check box so that a check mark does not appear.
- 7 Click the **Print** button if you want to print detail information for each of the customers before you purge.
- 8 When your purge list is ready to be deleted, click the **Purge Customers** button.
- 9 At Are you sure you want to delete these customers?, click **Yes**.

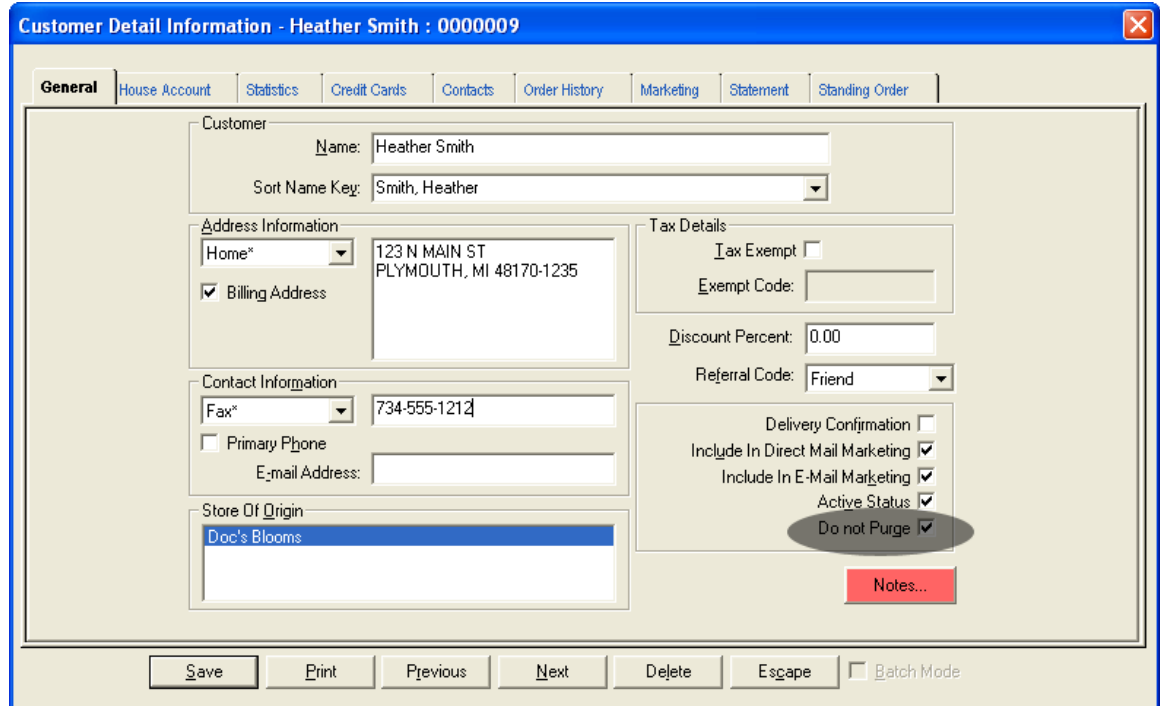
Protecting Customers from Customer Purge

You can protect a customer from the purging process by clicking on the Do not Purge check box in the Customer Detail Information window so that a check mark appears.

TASK To access the General tab of the Customer Detail Information window:

- 1 Click **Search** from the menu bar, then click **Customer**.
- 2 Type the customer's name in the text box and then click **Search**.
- 3 Double-click on the customer's name in the list.

Figure 7-24: Do Not Purge Customer



- 4 To protect the customer from a customer purge, click the **Do not Purge** check box so that a check mark appears (see above). The customer is protected from all customer purges until you go back and manually clear this check box.
- 5 Click **Save** to save your changes.

Deleting Individual Customers

You can delete individual customers without having to use the Purge Customers utility. In the Customer Detail Information window, click **Delete** to delete the customer. This button is active for all saved customers. Deleted customers are saved to the Purged Customer account.

NOTE For more information on the Purged Customer account and rules for deleting customers, see [Wedding Accounts](#) on page 7-35.

TASK To delete a customer:

- 1 Bring the customer record up on the screen. To do this, click **Search** from the menu bar, then click **Customer** from the drop down menu. Type the customer's name in the text box then click **Search**. Then double-click on the customer's account in the list.
- 2 With the customer record on the screen, click the **Delete** button. You receive the following warning message:

Clicking YES will delete the customer and the customer's statements from the database and associate any sales data to the Purged Customer account. Are you sure you want to delete this customer?
- 3 Click **Yes**. The customer record as well as the customer's statements are deleted. All sales data is saved to the Purged Customer account.

NOTE You cannot delete customers that have active standing order templates on file.

Purge Customers Window

The Purge Customers window allows you to delete inactive customers from your system. To purge customers, you specify the number of months of inactivity (the number of months since the customer has made a purchase). Purged customers will be permanently deleted from your system, however the data for all purged customers will be stored in a customer account called "Purged Customer." The data is stored in this account so that it can still be used for reporting purposes.

You can access the Purge Customers window from the Tools menu in FTD Mercury.

Figure 7-25: Purge Customers Window

Purge Customers

Search Criteria to Purge Customers:

- Months since last purchase: 99
- Do not purge customers with a House Account
- Customer Categories:

Category	
Account Type	
Mailer	
Promo	
Source	

Search

Customers Selected for Purging

Purge	Account Number	Customer Name	Last Purchase Date
<input checked="" type="checkbox"/>		Tracey Johnson	

Purge Customers Print Total: 1

Close

