



FTD Mercury[®]



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

Reference Guide

FTD Mercury Reference Guide (version 10.1)

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Overview

Congratulations and welcome to FTD Mercury! FTD Mercury is a complete Windows-based business tool that allows you to communicate easily with other florists and FTD Headquarters through the Mercury Network. FTD Mercury also automates other areas of your store, such as your customer database and the products you sell in your store.

FTD Mercury allows you to:

- » Send and receive Mercury orders and messages (see [Mercury Messages](#) on page 4–1)
- » Store all incoming and outgoing Mercury orders and messages in a message log (see [Message Center](#) on page 4–3)
- » Reconcile wire orders (see [Wire Service Reconciliation](#) on page 17–1)
- » Search for and reply to Mercury messages (see [Searching for Mercury Messages](#) on page 4–2)
- » Perform faster and easier florist and facility searches (see [Searching for Florists](#) on page 5–3 and [Facility Search](#) on page 5–13)
- » Create customer and product databases (see [Customer Maintenance](#) on page 7–1 and [Product Maintenance](#) on page 8–1)
- » Maintain your employees with different access levels to the program (see [Security](#) on page 6–6)
- » Use Microsoft Office to merge customer and recipient information for direct mail and marketing purposes (see [Mercury Marketing](#) on page 15–1)
- » Create and maintain customer house accounts—including printing, emailing, and faxing statements (see [Setting Up House Accounts](#) on page 7–29)
- » Process orders through Order Entry and Point of Sale (see [Working with Orders](#) on page 9–1)
- » Process orders and manage your cash drawer through Point of Sale (see [Managing Point of Sale Sessions](#) on page 11–1)
- » Confirm deliveries with email delivery confirmation (see [Sending Delivery Confirmation Email Messages](#) on page 9–73)
- » Maintain customer credit cards and perform settlements on credit card transactions (see [Processing and Settling Credit Cards](#) on page 13–1)
- » Automate billing functions and print customer statements (see [Accounts Receivable](#) on page 18–1)
- » Export general ledger files to third party accounting software (see [Accounting Application and QuickBooks Integration](#) on page 20–1 and [Legacy General Ledger Module](#) on page 21–1)
- » Create and maintain delivery routes (see [Creating Delivery Routes](#) on page 14–12)
- » Extract your customer information to create direct mail or email marketing campaigns (see [Mercury Marketing Module](#) on page 16–1)

- » And much more!

About This Reference Guide


Learning a new computer program requires patience and practice. The goal of this reference guide is to introduce you to key learning concepts of the FTD Mercury software and provide follow-up guidelines while you are learning.

The *FTD Mercury Reference Guide* is organized by chapters. This reference guide has been designed with numerous procedures to walk you through common tasks.

Documentation Conventions

This reference guide uses the following conventions for describing system navigation.

Table 1-1: System Navigation Conventions

When you see this...	Do this...
On the File menu, click New Customer .	Click the word File on the menu bar, then click the words New Customer from the menu that appears.
Click Send .	Click the Send button
Click  .	Click the on-screen calculator button.

Resources for Help

If you have an FTD Mercury usability issue, the following resources may be helpful to you:

- » If you want to know what's new from the previous release, see your *FTD Mercury New and Enhanced Features Guide*.
- » Check the Table of Contents and/or Index of this guide for the topic for which you need assistance. A shortcut to the manual is also available on your computer's desktop (double-click the **FTD Mercury Manual** icon).
- » Use FTD Mercury Online Help to search for your topic. On the **Help** menu, click **Contents**. See [Using Online Help](#) for more information.
- » Press **F1** to display a help page. F1 help pages are available in most areas of the program and are useful when you need help in a particular window.
- » Use FTD Mercury field help. If you need help with a particular field, right-click on that field to display help text, or in a text field, press **Ctrl** and **F1** simultaneously while your cursor is in that field.

Using FTD Mercury Help

Welcome to the FTD Mercury F1 Help system! This help system has been designed to walk you through procedures within a particular program window. If you find yourself "stuck" in a particular window and don't know what to do next, press **F1** and a help page will appear to help you along!

There have been three help systems designed to help you while you are learning your new FTD Mercury program:

- » F1 Help is designed to help you if you are 'stuck in a particular window. Just press **F1** in any window!
- » The Online Help system is designed like an online manual. It is accessed by selecting **Contents** from the **Help** menu. This help system contains a **Contents** tab (table of contents), **Index** tab (to select keywords from a list), a **Find** tab (to search for help pages that contain a keyword you provide), and a **Favorites** tab (to allow you to save pages you want to return to later).
- » The FTD Mercury field level help displays help for a particular field. Just right click on any field or press and hold the Ctrl key when your cursor is in that field and then press **F1**. A brief explanation of that field will display.

Don't Forget Your Other Resources for Help!

Your *FTD Mercury Reference Guide* is a complete manual to learning your FTD Mercury system. Use the Table of Contents and Index to find your help topic.

Your *FTD Mercury Quick Reference Guide* (available as a PDF on your desktop) will help you when you are first learning.


FTD Mercury support is available through a GENeral message at 90-5034AA or telephone at 1-888-681-7911. You may speak to a live representative Monday through Friday from 7 A.M. to 7 P.M. or Saturday from 7 A.M. to 6 P.M. Central Time.

Using Online Help

Online help is a quick, easy way to find answers. To access online help, on the **Help** menu click **Contents**.


The Contents, Index, Search, and Favorites Tabs

The FTD Mercury Online Help system consists of three tabs to help you find information: **Contents**, **Index**, and **Search**. An additional fourth tab, **Favorites**, allows you to store pages you want to access later.

The **Contents** tab appears when you open the help program. It consists of a series of books and pages. Pages are represented by the  icon. Pages contain the information you are looking for – general information, procedures, and tips.


When the help program opens, all books are closed:




Figure 1-1: Help Books (Closed).

 Mercury Marketing

If you double-click on a book, it displays the contents of that book:

Figure 1-2: Help Books (Opened)

 Mercury Marketing

-  Creating Marketing Categories
-  Assigning Marketing Categories to Customers
-  Printing Marketing Letters

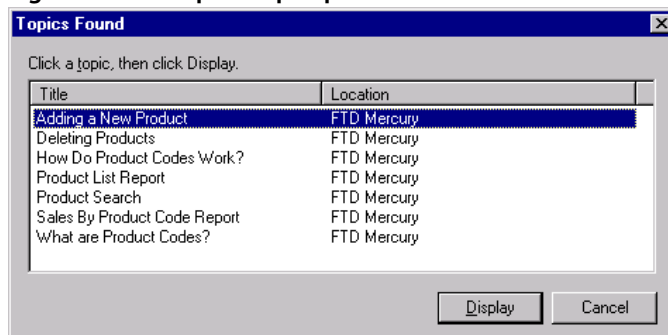
Click on the page that contains the information you are looking for and the help topic displays.

The **Index** tab allows you to enter keywords to find the information you are looking for. Enter a keyword, and the topic that best represents your keyword is highlighted. Double-click on that topic to display its contents.

The **Search** tab finds all topics in the help program that contain the keyword you enter. It finds all topics that include your keyword somewhere in the text.

When selecting a keyword in either the **Index** or **Search** tabs, there may be multiple help topics that fit that keyword. In this case a popup window displays and allows you to select a topic to display. For example, if you click the “Products” keyword, the system allows you to choose a specific topic to display.

Figure 1-3: Multiple Help Topics Found



Highlight the topic that you want to display, then click the **Display** button.

Hyperlinks and Breadcrumbs

Many pages in FTD Mercury Online Help contain hyperlinks. These are underlined words that, when clicked, take you to other related pages.

On the top of each page, special hyperlinks called breadcrumbs are provided to allow you to see where the page fits within the help system structure. Click on these links to “back up” a level to a more general topic.

FTD Mercury Technical Support

If you cannot find the answer to your question through the resources listed in this chapter, call the Mercury Technology Assistance Center Monday through Friday from 7am to 7pm or Saturday from 7am to 6pm Central Time at 1-888-309-2244. You may also send a GENERAL Message to 90-5034AA.

Other Important Phone Numbers

- » FTD Member Services: 1-800-669-1000
- » Mercury Technology Sales: 1-800-767-3222

Flowers All Hours

Flowers All Hours (FAH) is a service which provides Members’ stores and customers with 24-hour telephone service.

Once you sign up for this service, any time you need assistance during a hectic day, or when you're ready to close for the night, simply activate the "Call Forward" feature on your phone. This will transfer your incoming calls to FTD Flowers All Hours.

Trained FTD representatives answer your calls promptly and courteously, using your store name. They'll use your customized product and pricing information to assist callers and to take accurate orders. All the information, including customer name, address, phone number, special instructions and payment information is forwarded to you via the FTD Mercury® Network. When the rush is over, or when you open again in the morning, your orders and messages will be waiting for you on your Mercury system.

To get started, call 1-800-669-1000, or send a GEN message to 90-9200AA.

Florists Online

With the increase in the number of consumers who purchase on the Internet, FTD members find it necessary and important to the future growth and success of their business to invest in a high-quality, secure Web Site.

With a Florists Online Web Site, you can reach millions of new customers and sell your entire store's product selection to online customers around the world and receive the order fulfillment information via the Mercury Network.

You don't even need a computer or Internet access—it's that simple!

For more information, please call 1-800-576-6721 Monday-Friday 8:30 A.M.–5 P.M. Central Time to speak to an FTD Florists Online Internet Service Representative, or send a Mercury GENeral message to 90-8418AA, or email us at floristsonline@ftdi.com and we'll be happy to assist you!

FTD Flower Exchange

The FTD Flower Exchange is a FREE & EXCLUSIVE online fresh flower buying platform designed to provide options to our members for their floral needs. We have partnered with the BEST growers and BEST logistics companies around the world to provide FTD members the very best floral purchasing solutions for their businesses. We are leveraging the buying power of thousands of florists to bring the BEST possible prices all year long.

Expansive Selection from Best Growers Around the World

Quality is our number one priority. The FTD Flower Exchange grower partners are continually monitored and inspected to insure the best quality products are available to FTD members all year long. All of our partners are identified by the brands you trust and include Rio Roses, Esmeralda, Sun Valley, Passion Growers, Dos Gringos, Sole', Benchmark, Dole and more. Every day we offer access to 4,000+ of the best products from South America, Holland, Central America and California.

Professional & Experienced Team

FTD has invested in an experienced team of Procurement, Logistics, Sales and Support professionals that are 100% dedicated to the fresh flower needs of FTD members. Our team works regularly with florists of all sizes to develop floral programs tailored to meet the needs of each business. Whether it is custom boxes, standing orders, logistics solutions or holiday purchases our team can save you time and money.

Convenient, Reliable, and Flexible

Our state of the art web site is open for business 24 hours a day, 7 days a week and 365 days a year. The online buying platform provides visibility to 'just-in-time' inventory, prebook availability and a full purchase and pricing history. Additionally, florists can purchase directly from over 30 of the best growers around the world on one consolidated order that can be added to their FTD Clearinghouse Statement or charged to a credit card.

Customized Purchasing and Logistics Solutions

Delivery options include Federal Express, DHL, air freight and refrigerated delivery. The all new BUILD A BOX program is exclusive to FTD Members. For the first time, FTD florists can custom pack their own boxes at the farm level. It is truly unique and gives florists the ability to purchase based on what makes sense for their business.

Daily, Weekly, Event, and Holiday Promotions

Our procurement team works with growers daily to find the very best deals. The daily and weekly HOT BUYS are the products you need at prices you can't afford to pass up. The holiday specials, add-on promotions and standing order discounts are just a few of the programs designed to help florists maximize savings.

Contact Us

FTD Flower Exchange is more than just a place for FTD members to purchase their wholesale bulk flowers. Contact us today to learn more.

www.ftdflowerexchange.com

ftdflowerexchange@ftdi.com

1-800-767-4000

FTD WebGifts

For a one-time fee of \$50, you can enter the multi-billion dollar gift business!

FTD WebGifts is an inventory-free consumer direct service offering a collection of both floral and non-floral gift items for you to sell in your shop or on your web site. You send the orders to FTD via your Mercury system and we ship the product directly to the recipient. No inventory and no hassle! FTD Members earn normal sending commission plus rebates on every order.

Participating is as Easy as 1, 2, 3!

- 1 Enroll and add FTD WebGifts products to your web site
 - » Contact your FBC, Call WebGifts Customer Service at 1-800-767-4000, or Email WebGifts Customer Service at WebGifts@ftdi.com
 - » If you are a Florists Online (FOL) Member, we will coordinate with FOL to have WebGifts added to your web site
 - » If you host your own web site, we will send you a CD-ROM of images and Suggested Retail Prices (SRP's) for you to add
 - » All images and SRP's can be found at FTDi.com
- 2 Promote that you are in the gift business in your marketing materials
 - » Utilize FTD WebGifts imprint magnets, imprint catalogs and statement stuffers in your daily business
 - » Direct people to your site through FOL Local Search, FTD Directory, etc.

- » There is no inventory to carry and no product to buy!
- 3 Close the sale and send the orders to 90-0233AA for fulfillment. The vendor will ship the product directly to the gift recipient on your behalf with your store's information.
 - » All orders received in the given month will appear on the Members Clearinghouse Statement
 - » Receive 20% commission (normal sending commission)
 - » Earn sending rebates
 - » Sent orders count towards members monthly quota

Interflora

Interflora, Inc. is an international clearing house for flower-by-wire orders exchanged between Members of the groups comprising Interflora, Inc. For more information about Interflora, call 1-800-788-9000.

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

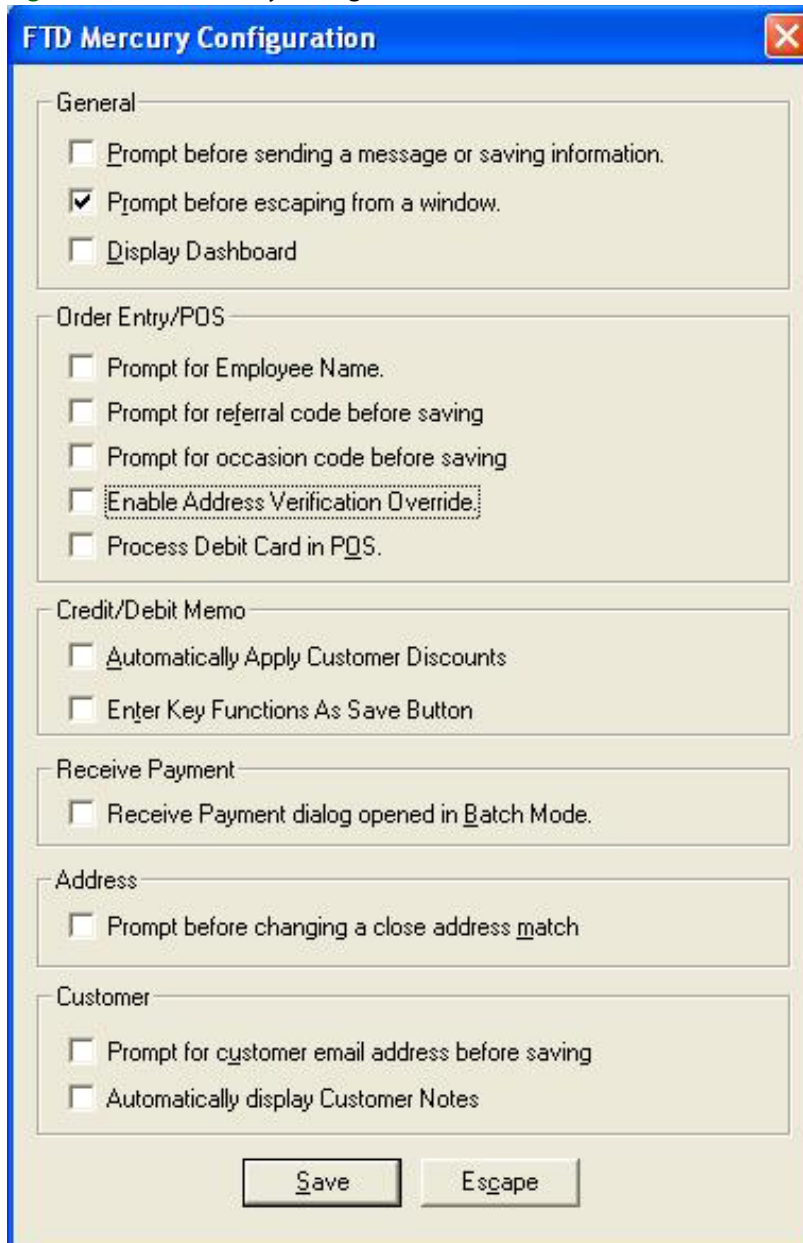
TASK **To configure general system preferences:**

- 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.)

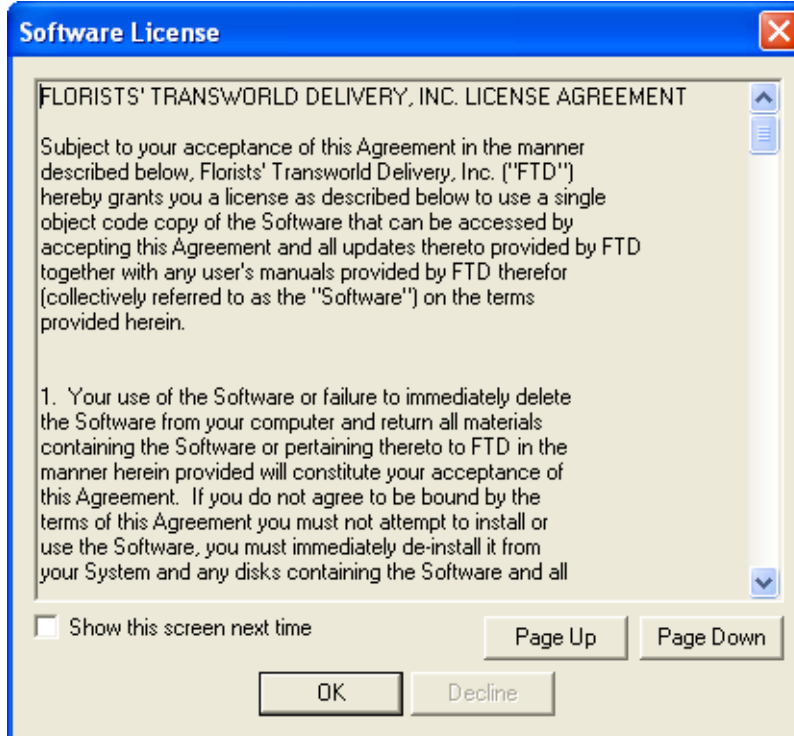
Option	Description
Display Dashboard	When checked, this option will automatically open the Dashboard when FTD Mercury starts.
Prompt for referral code before saving	When this option is checked, you receive the following message in Order Entry and Point of Sale if you attempt to save the order with the 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.

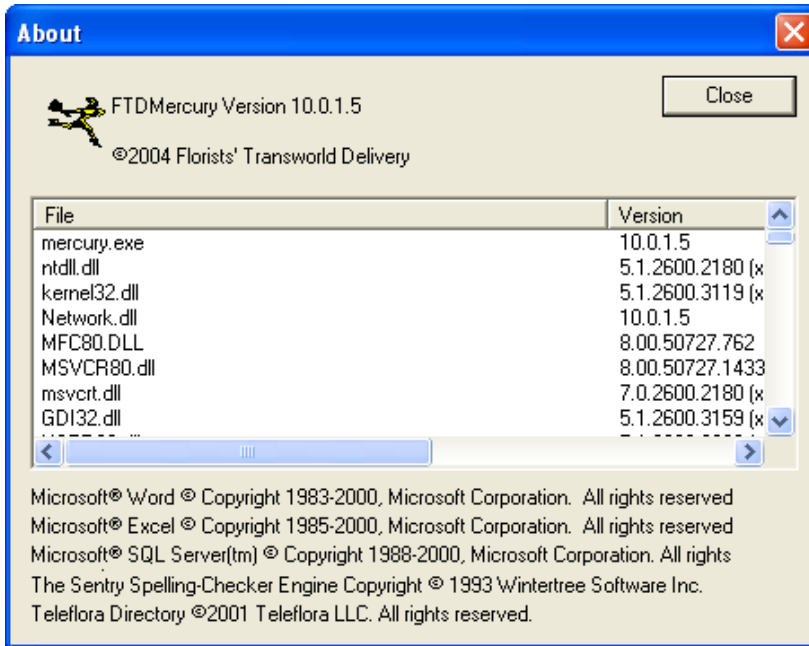
If you do not agree with the terms of the license agreement, click Decline. The software will not start. Contact the FTD Sales Department at 1-800-669-1000 to discuss the terms of the license agreement.

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.

The Mercury Network

Congratulations on becoming a Mercury Network Subscriber! As an FTD Mercury user, you are now a part of the most sophisticated, yet easy-to-use network available for handling your wire orders and communications with other florists (using Mercury messages).

The Mercury Network is a communications network developed especially with the FTD Member in mind, made up of individual systems linked to a Host Computer.

The Mercury Network includes two key elements: the Mercury component system, and FTD Headquarters in Downers Grove, Illinois

The first element is the Mercury component system, located in each participating Member's store. Multi-store owners may choose to have the system serve more than one store. A branching design allows traffic going to different stores to be routed through a single system.

Mercury component systems are linked via telephone lines to the second major element, FTD Headquarters located in Downers Grove, Illinois. This element consists of:

- » The **Mercury Host Computer**, which processes orders and messages and sends them on to receiving Members.
- » The **Floral Order Relay Center** facility, which manually handles orders and order-related messages by telephone to Members with temporarily inoperative systems.
- » The **Mercury Technology Assistance Center**, which answers questions and helps Members find solutions to problems. Members can contact the Mercury Technology Assistance Center by dialing 1-800-669-1000, or by sending a free general (GEN) message to 90-5034AA.
- » The **Data Processing Center**, which, for billing purposes, automatically reports incoming orders processed through the Mercury Network.
- » The **Mercury Sales Department**, which can fill orders for new equipment or can answer your questions on which equipment would best suit your store. You may reach the Mercury Sales Department between 7 A.M. and 5 P.M. Central Time at 1-800-669-1000. You may also send a free general (GEN) message to 90-4664AA.

Host Computer Operations

When an order is transmitted from a sending Member to a filling Member, and both Members are linked to the Mercury Network via component systems, the order is routed through the Host Computer to the filling Member.

Orders are first routed to the filling Member selected by the sending Member. Three attempts are made to reach the Member's store via its component system. Occasionally, due to busy telephone lines (or for some other reason), the filling Member selected cannot be reached. If this situation occurs and the priority time on the order permits, another florist also serving that city will be chosen by a random computer selection process, called *auto select*. An attempt will then be made

to send the order to the new filling Member. The sending Member will receive a FORward message which will indicate:

FORWARDING FLST: auto select

At the text or reason prompt, this explanation will appear:

Unable to contact selected florist. Order forwarded. Do not resend.

If a filling Member cannot be reached within the allotted time specified by the priority level of the message, the Host Computer will reject and return the order to the sending Member. The sending Member may then elect to resend the order.

An *input auto select* can also take place. This occurs when the filling Member selected by the sending Member is closed or not accepting orders. Upon receipt of the order, the Host Computer automatically selects a new filling Member based on the city in which the original filling florist is located, NOT on the ZIP code. *Input auto select* will appear under the time and date on the verified order. The sending florist will receive a FORward message indicating the new filling Member.

Hours of Operation

The Host Computer is available to send floral orders and messages Monday through Saturday, at the following times:

Table 3-1: Host Computer Availability (Monday–Saturday)

Time Zone	Hours of Operation
Eastern	7:00 A.M. to Midnight
Central	6:00 A.M. to 11:00 P.M.
Mountain	5:00 A.M. to 10:00 P.M.
Pacific	4:00 A.M. to 9:00 P.M.
Alaska and Hawaii	1:00 A.M. to 6:00 P.M.

NOTE The Host Computer can send floral orders and messages on Sundays from 6:00 A.M. to 7:00 P.M. Central Time.

FTD International Retrans Service

The FTD International Retrans Service allows Members to send flowers to virtually anywhere in the world. FTD International Retrans Service receives your order, prepares it for dependable delivery, and transmits it to the appropriate country. The service is valuable to stores that send or receive orders internationally for the following reasons:

- » Ease of transmission
- » Knowledge of the overseas Retrans Unit in selection of a filling florist
- » No language barriers to overcome
- » Billing through FTD Clearing House without currency conversion or exchange rate problems

To send an order through the FTD International Retrans Service, send a Mercury order to 90-0266 (Retrans Mercury Number) followed by the appropriate country suffix as listed on page I-6 of your FTD Directory and Toll-Free Listings book. Normal transmission charges for all orders sent to FTD Retrans Service at 90-0266 are free.

IMPORTANT The Mercury® Network serves Canada and Puerto Rico. You should not send orders to Canada and Puerto Rico through FTD Retrains.

Preparing Your Retrains Order

When a customer requests an order to be sent overseas, please refer to your Interflora International Delivery Directory (IDD) for the current year and check for the following information:

- » Check that the country and city you are sending the order to is listed in the directory.
- » When you locate the country in the directory, check that the flowers and/or plants the customer is requesting are available (as well as any minimum prices).
- » Check for any special operating hours or holiday hours.
- » Check the delivery information (charges, guarantees) and ensure the order will have enough time to be delivered.

Following are instructions to complete the order. The order must be a Mercury order.

TASK To complete a Retrains order:

- 1 Enter all recipient information as normal. Be sure to record the recipient name, complete address including ZIP code (maximum 255 characters), and phone number.
- 2 Complete the delivery information as normal. Same day delivery is not possible (except for Central and South America).
- 3 Enter the first and second choice products as normal (be sure these products are available by checking the country information in the directory).
- 4 Fields for products, card message, and special instructions should contain no more than 255 characters each.
- 5 Complete the price in dollars. Do not include the regular Retrains fee of \$12.00 for U.S. and \$14.00 for Canada. However, include taxes and any service charges your store charges for the order. Although you do not indicate the Retrains fee on the order, collect the fee from the customer. You will be billed on your Clearing House statement for the Retrains fee.
- 6 Type the filling florist code 90-0266 (Retrains Mercury Number) followed by the appropriate country suffix as listed on page I-6 of your FTD Directory and Toll-Free Listings book.

Retrans Charges

Retrans charges are \$12.00 for U.S. and \$14.00 for Canada. All orders received from FTD Retrains are credited automatically to your Clearing House account.

International Retrains Service Hours of Operation

The number for the International Retrains Service is 1-800-788-9000, extension 4600. Times are listed in Central Time.

Table 3-2: International Retrains Service Hours of Operation

Days	Times (Central Time Zone)
Monday–Friday	7:00 A.M.–5:30 P.M.
Saturday (June 1–September 4)	7:00 A.M.–1:00 P.M.
Saturday (September 5–May 31)	7:00 A.M.–4:00 P.M.

Mercury Messages

Mercury messages are a way for you to communicate with other florists, FTD Headquarters, FTD.com, and your Floral Business Consultant (FBC). Several Mercury Message types have been created to assist you

Mercury message types have been established to help you with this communication, and they allow you to perform several business functions for your store including placing orders and administering FTD billing activity. Message types have also been created to respond to other Mercury Messages.

Mercury Message Types

Mercury Messages are divided into four main groups:

Orders

The Mercury Order Message is a message that allows you to create an order to send to another florist on the Mercury Network. You create Mercury Order messages by entering an order in Point of Sale or Order Entry and sending it to a filling florist over the Mercury Network.

Responses

Most Mercury Messages are ones you send in response to an incoming message (whether that be an order or subsequent message from another florist). Responses include the following:

Table 4-1: Mercury Message Responses

Message Type	Description
Price Change	To request a price change. This is typically when you receive an incoming order from another florist and you would like more money for the item(s) the sending florist is ordering. Price changes are done via ASK messages, but they have their own option in the Response menu in Message Center.
ASK Message	To make order-related inquiries. Price change requests are also done via ASK messages.
ANSwer Message	To respond to an ASK message.
CANcellation Message	To request that a filling Member or the Host Computer cancel a previously sent order.
CONfirmation Message	To confirm a CANcel request.
Delivery Confirmation Message (ANS)	To send a confirmation of delivery to the sending florist.

Table 4-1: Mercury Message Responses (cont.)

Message Type	Description
DENy Message	To refuse a CANcel request.
FORward Message	To forward an order to another Member.
REJect Message	To reject an order.

Suspend/Resume Terminal Messages

The Suspend message allows you to suspend your system temporarily from receiving orders or messages. When you send a Suspend message, you also set the time and date when you want your terminal to start receiving messages again. After you have sent a Suspend message, if you want to change the time or date when you want to start receiving messages again, you can send a Resume message.

Miscellaneous Messages

There are several “miscellaneous” messages that allow you to perform other tasks. These messages include:

Table 4-2: Miscellaneous Mercury Messages

Message Type	Description
GENeral Message	To send general messages to other Mercury Members, FTD, or your FBC.
ADJustment Report Message	To report an error on the Outgoing Orders section of the Combined Report (sending Member only).
REC Message List (REC)	To report Mercury orders that you receive by telephone to the FTD Clearing House.
RETrieval Message	To retrieve previously transmitted messages.

Searching for Mercury Messages

Message searches are performed in Message Center. Once you open Message Center (either from the FTD Mercury Main Menu or via Order Entry or Point of Sale), you can search for any Mercury messages in your system by one or more parameters. Messages that match all parameters are displayed in the results list. If you specify too broad of a search, you may get too many results; if your search is too narrow (too many parameters), you may not get any matches. You may want to try a broad search first, and if you have too many results, add additional search parameters to narrow the results.

TASK To search for a Mercury Message:

- 1 If you are searching from the **FTD Mercury Main Menu**, click the **Message** button from the **Search** area at the top right of the window. If you are searching from **Order Entry** or **Point of Sale**, click the **Message Center** button. In both cases, the **Message Center** window opens.
- 2 In the **Search Parameters** area, enter the criteria you want to use to locate the message. When you have entered all desired parameters, click **Search**.

NOTE

- If you enter more than one search parameter, for a message to be included in the results list, it must match all parameters.
- 3 Messages that meet the criteria entered appear in the results area.

Once the search is complete, the first row in the results list is selected. When you highlight a message in the results list, any related messages are displayed in the related messages list. A preview of the actual message is displayed in the Message area, and details about the florist are displayed in the Florist area.

You can click on column headers in the results area to sort the results. If there are more matching messages than can be displayed, click More to display additional messages matching your search criteria.

Message Center

The Mercury Message Center is an integrated hub through which you can review all incoming and outgoing Mercury Messages, as well as access all related Mercury Messages in the conversation. You can search for Mercury Messages in your system using a variety of criteria.

Opening Message Center from Order Entry and Point of Sale

You can open Message Center from both the Order Entry window and the Point of Sale window. However, in Point of Sale, the opening balance must have been set (otherwise the Message Center button is disabled).

TASK To open Message Center from the Order Entry window or Point of Sale window:

On the Order Entry window or Point of Sale window, click Message Center. The Message Center window opens.

If you open Message Center from a blank Order Entry or Point of Sale window (that is, you have not entered information into the window yet for the order), by default Message Center searches for all orders that have not been attached, have an error status, have not been completed, or orders with related messages that have not been acknowledged nor had a response sent. If you attempt to open the Message Center when you are entering an order, you are asked if you want to cancel the order. If you respond Yes, the order is cancelled and Message Center opens. If you respond No, you are returned to the order.

If you have a completed order open in Order Entry or Point of Sale and you click Message Center, Message Center opens and automatically performs a search for that Order #, displaying all messages related to that order.

As you attach (open the incoming message in Order Entry) messages, acknowledge messages, or send responses to messages, orders are removed from the Message Center results list (that is, they no longer appear as requiring attention).

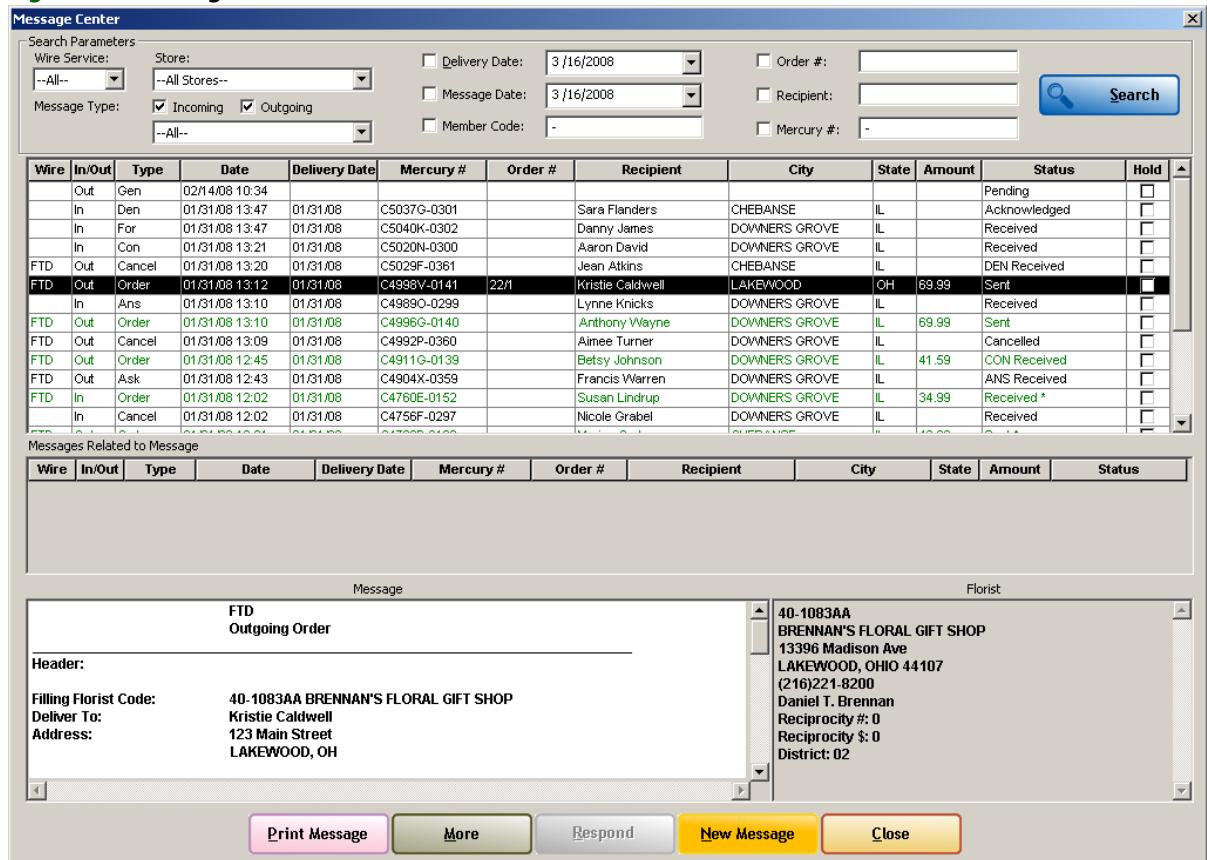
Opening Message Center from the FTD Mercury Main Menu

You can open the Message Center from the FTD Mercury Main Menu by clicking the Message button from the Search area at the top right of the window. You can also open it by selecting Message Search from the Search menu. By default, Message Center searches for all message types by message date and displays the results.

Message Center Window

The Mercury Message Center is an integrated hub through which you can review all incoming and outgoing Mercury Messages, as well as access all related Mercury Messages in the conversation. You can search for Mercury Messages in your system using a variety of criteria.

Figure 4-1: Message Center Window



The Message Center is divided into the following major areas:

- » Search Parameters Area
- » Search Results List
- » Related Messages List
- » Message Area
- » Florist Area
- » Button Ribbon

Search Parameters Area

In this area, you specify the criteria you want to use when performing a message search. If you select multiple criteria, a message has to match all parameters to be included in the search results area.

Table 4-3: Search Parameters

Parameter	Description
Wire Service	<p>Select the wire service you want to search. You can select from the following:</p> <ul style="list-style-type: none"> » --ALL--: This option searches all wire services configured in the Wire Code screen in Mercury Administration. » FTD: Restricts the search to FTD messages. » Teleflora: Restricts the search to Teleflora messages. » FOL: Restricts the search to Florists Online orders. » FAH: Restricts the search to Flowers All Hours orders. » WEB: Restricts the search to Web Order Interface (WOI) orders. » DOV: Restricts the search to Dove orders received via the Automated Order Interface (AOI), if you are licensed to use AOI. » BLM: Restricts the search to BloomLink orders received via the Automated Order Interface (AOI), if you are licensed to use AOI.
Store	<p>If you are configured as a multi-store business, either select --All Stores-- to search all stores, or select the specific store you want to search. If you are a single-store business, this parameter is disabled.</p>
Message Type	<p>Select whether you want to search incoming messages, outgoing messages, or both. Then select whether you want to restrict the search to specific message types. You can select from the following:</p> <ul style="list-style-type: none"> » Requires Attention » --ALL-- » Answer » Ask » Cancel » Confirm » Deny » Forward » Gen Message » Order » Reject » Retrieval » Adjustment » REC Message List » Resume » Suspend
Delivery Date	<p>Specify the delivery date for the message for which you are searching. Any delivery date from that date forward to the current date will be included in the search.</p>
Message Date	<p>Specify the message date for the message for which you are searching. Any date from that date forward to the current date will be included in the search.</p>

Table 4-3: Search Parameters (cont.)

Parameter	Description
Member Code	Enter the member code of the florist associated with the message you are searching for.
Ticket #	Enter the ticket number associated with the message you are searching for.
Recipient	Enter the recipient for the Mercury Message you are searching for.
Mercury #	Enter the Mercury number for the Mercury Message you are searching for.

Search Results List

Once you click the Search button, the Message Center displays a list of all messages that match your search criteria. This list contains the following columns (you can click on column headers to sort the list).

Table 4-4: Search Results List

Column	Description
Wire	The wire service through which the message was received. This can be one of the following: <ul style="list-style-type: none"> » FTD (used for orders received from or sent to the FTD Mercury Network) » TEL, AFS, etc. (used for orders entered for other wire services maintained on the system) » DOV (used for Dove orders received through AOI) » BLM (used for Bloomlink orders received through AOI) » FAH (used for orders received via Flowers All Hours) » FOL (used for orders received from Florists Online) » WEB (used for orders received through WOI)
In/Out	IN is for incoming messages; OUT is for outgoing messages. When you search for incoming orders, phoned in orders are included in the search results.
Type	The type of message. This can be one of the following: <ul style="list-style-type: none"> » Answer » Ask » Cancel » Confirm » Deny » Forward » Gen » Order » Reject » Adjustment » Retrieval » Resume » Suspend » Rec Message
Date	The date and time of the Mercury Message.
Delivery Date	The delivery date for the order. If there is no delivery date, this will be blank.

Table 4-4: Search Results List (cont.)

Column	Description
Mercury #	When there is an associated Mercury number, it will be displayed here. For phoned-in orders, this column displays the Contact Name; if no Contact Name was provided, this column will be blank.
Ticket #	The ticket number associated with the message. If this message is not order-related or is not attached to an order, this column will be blank.
Recipient	The Recipient Name from the message (if available).
City	The City from the message (if available).
State	The State or Province from the message (if available).
Amount	The total amount of the message.
Status	<p>The current status for the message. This can be one of the following:</p> <ul style="list-style-type: none"> » Received » Sent » Error (you can see the error cause at the bottom of the Mercury Message; errors are colored in red text) » Pending » ASK Received » ASK Sent » ANS Received » ANS Sent » Cancelled » Rejected » CAN pending » Phoned » CON Received » CON Sent » DEN Received » DEN Sent » Acknowledged » In Use (in addition to this status, the row will be highlighted in yellow) <p>Once you have responded to a message, the status includes an asterisk (*) after it in the Status column.</p>
Hold	When this box is checked, the message will be included in the Requires Attention list in Message Center. The Hold check box is disabled for all messages except for order messages.

Search Results Colors

Search results are color-coded as follows:

Table 4-5: Search Results Colors

Color	Description
Yellow Highlighted Row	The message is currently in use by another employee. You cannot access in-use messages.

Table 4-5: Search Results Colors (cont.)

Color	Description
Red Text	There was an error in the message. Typically, the error is listed at the bottom of the Mercury Message (in the bottom left corner of the Message Center).
Green Text	Any unattached message (messages waiting to have orders created for them on your system).

Related Messages List

This list displays all messages related to the message selected in the Mercury Message Log. When you select a message from this list, the message appears in the Message Area and the florist associated with the message displays in the Florist Area.

Message Area

This area contains the text of the Mercury Message. If you print a message, it will be outputted in the same format you see in the Message area.

Florist Area

This area displays information about the florist associated with the currently selected message.

Button Ribbon

The following buttons are available in the button ribbon at the bottom of the screen:

Table 4-6: Button Ribbon

Button	Description
Select	This button only appears if you open Message Center from Order Entry or Point of Sale. Clicking this button is equivalent to double-clicking a message—for unattached orders, this attaches them in Order Entry or Point of Sale, and for already attached orders (or messages related to already attached orders), the order opens in Order Entry or Point of Sale.
Print Message	Prints a copy of the currently selected and displayed message. A single copy of the selected Mercury Message prints to the Mercury Message printer. If no printer is configured as the Mercury Message printer, the message prints to the default Windows printer.
More	Displays additional messages that meet the search criteria.
Respond	This button is only enabled if the selected message is associated with a Mercury Message number. When you click Respond, the list of appropriate responses for the selected message is displayed (the same functionality exists if you right-click on a message in the results list). When you select the response, the appropriate response window opens so you can create the message and send the response. After you create a response, the related messages list automatically refreshes to include your response. Any responses will use the sending shop code from the original order.
New Message	Opens the New Message window, allowing you to select the message type you want to create. The appropriate message window will then open and allow you to craft and send your message.
Close	Closes Message Center and returns you to the window from which you launched Message Center (the FTD Mercury Main Menu, Order Entry, or Point of Sale).

Working with Message Center

There are several tasks you perform using Message Center.

- » Attaching incoming orders (creating orders in Order Entry from incoming orders). For more information, see [Attaching Incoming Orders](#) on page 4-9
- » Responding to incoming messages. For more information, see [Responding to Mercury Messages](#) on page 4-12.
- » Sending new outgoing messages. For more information, see [Creating New Mercury Messages](#) on page 4-11.
- » Printing the selected message. For more information, see [Printing Messages](#) on page 4-17.

Attaching Incoming Orders

Attaching incoming messages, in essence, allows you to convert an incoming message from another florist, from Florists Online (FOL), from Flowers All Hours (FAH), or from your Web site into an order in Order Entry. Once in Order Entry, you can then make any additional modifications to the order (product changes, set the delivery zone, etc.), and then complete the order.

NOTE In previous versions of FTD Mercury, this was done via Order Entry. Now, you handle it through Message Center.

Messages that still need to be attached appear in green text in Message Center.

IMPORTANT If you attach a Web order with a product code that has more than 10 characters, the product code on the Web order may not be selected correctly in Order Entry. You may have to manually select the equivalent product code on your system.

TASK To attach incoming orders:

- 1 On the **FTD Mercury Main Menu**, click either **Order Entry** or **Point of Sale**. The **Order Entry** or **Point of Sale** window opens.
- 2 Click **Message Center**. The **Message Center** opens, and automatically performs a search for messages that require attention. Orders in the results list that need to be attached appear in green text.
- 3 Double-click on an order in the results list. The order opens in **Order Entry** or **Point of Sale** (depending on where you opened Message Center).
- 4 Make any necessary changes and click **Payment**. The **Payments** window opens.
- 5 Click **Complete**.

Invoices and worksheets will print based on settings in Mercury Administration. The order will become available in Design Center for designer assignment.

Handling Messages that Require Attention

Message Center includes a filter that displays messages that require your attention. By default, when you open Message Center from Order Entry or Point of Sale, Message Center performs a search for these messages.

You should always ensure you are handling these messages that require attention to keep your business running smoothly when it comes to wire orders.

The following criteria is used in determining whether a message requires attention:

- » Any incoming or outgoing order message that has not been attached (except for phoned in orders)

- » Any incomplete order
- » Any outgoing order with errors
- » Any order where you have received a message that needs a response (for example, an Ask message you need to answer or a Reject message where the order needs to be resent)
- » Any order message where the Hold box has been checked

The Requires Attention list also sets the Delivery Date parameter to 30 days back from the current date.

TASK To display the Requires Attention list in Message Center:

- 1 Select both the **Incoming** and **Outgoing** check boxes.
- 2 From the **Message Type** list, select **Requires Attention**.
- 3 Click **Search**.

All messages that require attention appear in the results list.

TIP When you open Message Center from Order Entry or Point of Sale, the default search is for messages that require attention.

Removing Messages from the Requires Attention List

If a message appears in the Requires Attention list, you need to take an action on it to remove it from the list. If you are unclear on why the message appears in the Requires Attention list, right-click on the message and select Why This Requires Attention. A window will inform you why the message requires attention.

The action you take depends on the type of message and its status.

Table 4-7: Removing Messages from Requires Attention

Message Type	How You Remove It from Requires Attention
Incoming Order	<ul style="list-style-type: none"> » Attach it » Reject it » Forward it
Incoming Ask	<ul style="list-style-type: none"> » Send an Answer message (when you send an Answer message, the Ask message is automatically acknowledged) » Acknowledge the message
Incoming Answer	Acknowledge the message
Incoming Forward	Acknowledge the message
Incoming Reject	<ul style="list-style-type: none"> » Resend the order » Cancel the order
Incoming Confirm	Acknowledge the message
Incoming Cancel	<ul style="list-style-type: none"> » Confirm the message » Deny the message
Incoming Deny	Acknowledge the message
Outgoing Order with Error	Resend the order

Table 4-7: Removing Messages from Requires Attention (cont.)

Message Type	How You Remove It from Requires Attention
Outgoing Order Attached to an Incomplete Sale	Complete the sale

Although the optimal way for removing messages from the Requires Attention list is to take action on the message, you can also right-click on a message in Requires Attention and select Remove from Requires Attention. You are informed that updates to the order or additional related messages may cause the message to reappear in the list. You are then prompted to confirm the removal.

Dealing with Incoming Reject Messages

When you receive an incoming reject message and you double-click on it in Message Center, the original order that was rejected opens in Order Entry. The order itself is marked as an incomplete wire out order (that can be located via Ticket Search if necessary), and will show up in Dashboard as Incomplete.

Once you open the order in Order Entry, you can then select a new filling florist and complete the order as you would normally. A new Mercury Order message will be sent to the new filling florist.

NOTE If you use Auto Select to find a new filling florist, it will automatically disregard any florist who previously rejected the message (so there is no danger of sending it to the same florist again). For more information, see [Auto Select](#) on page 4-18.

Opening Orders Related to Messages

For any message that already has an associated order in your system, when you double-click the message in the results list, Order Entry opens the order associated with the message, allowing you to view the order or make appropriate changes (prior to responding to a message, for example).

If you reject or forward a message from Message Center, you are not required to open the message in Order Entry (by double-clicking the order). Once you send the Reject or Forward message, the original message you received will be removed from the results list.

Likewise, if you receive a Cancel message on an incoming order and send a Confirm message, the order will be removed from the results list without you having to open the message in Order Entry.

Creating New Mercury Messages

There are several different Mercury Messages you may need to create (as opposed to responding to an incoming message):

- » Adjustment message. For more information, see [Sending an ADJustment Report Message](#) on page 4-38.
- » General message. For more information, see [Sending a GENeral Message](#) on page 4-37.
- » REC Message list. For more information, see [Sending a REC Message](#) on page 4-40.
- » Retrieval message. For more information, see [Sending a RETrieval Message](#) on page 4-45.
- » Resume message. For more information, see [SUSpend and RESume Messages](#) on page 4-42.
- » Suspend message. For more information, see [SUSpend and RESume Messages](#) on page 4-42.

You can create all of these messages from Message Center by clicking the New Message button. When the New Message window opens, select the message type you want to create and another window will open, allowing you to craft and send your message.

New Message Window

The New Message window opens when you click New Message in the Message Center.

Figure 4-2: New Message Window



You can select from the following new message types:

- » Adjustment—Opens the Adjustment Message (ADJ) window. For more information, see [Sending an ADJUSTment Report Message](#) on page 4-38.
- » General—Opens the General Message Detail window. For more information, see [Sending a GENeral Message](#) on page 4-37
- » REC Message List—Opens the REC Message List window. For more information, see [Sending a REC Message](#) on page 4-40
- » Retrieval—Opens the Retrieval Message (RET) window. For more information, see [Sending a RETrieval Message](#) on page 4-45
- » Resume—Opens the Create Resume Message (RES) window. For more information, see [SUSpend and RESume Messages](#) on page 4-42
- » Suspend—Opens the Create Suspend Message (SUS) window. For more information, see [SUSpend and RESume Messages](#) on page 4-42

Once you select the message you are creating, click OK to open the appropriate message window and craft your message.

Responding to Mercury Messages

When you receive messages from other florists, you may need to respond to them. For example, if you receive an Ask message, you need to send an Answer message. If you receive a Cancel message, you either need to send a Confirm or a Deny message.

TASK **To respond to a message in Message Center:**

- 1 Perform a search to locate the message to which you want to respond.
- 2 Select the message from the results list and click the **Respond** button. A menu with valid responses opens. Select the response.
- 3 When the window for the response opens, craft the message.
- 4 Click **Send**.

NOTE You can only respond to messages that have a Mercury Message number.

Responding to Incoming Messages

Depending on the incoming message type, there are several tasks you can perform.

Responding to Incoming Order Messages

When you receive an incoming order message from another florist, you can:

- » Accept the order and fill it. You must attach the message and complete it in Order Entry. For more information, see [Attaching Incoming Orders](#) on page 4–9. Once you attach the message, it is removed from the Requires Attention list.
- » Send a price change request. For more information, see [Requesting a Price Change](#) on page 4–15.
- » Send an Ask message to ask a florist a question about the order. For more information, see [Sending an ASK Message](#) on page 4–19.
- » Forward the order to another florist. For more information, see [Sending a FORward Message](#) on page 4–32. Once you forward the order, the message is removed from the Requires Attention list.
- » Reject the order. For more information, see [Rejecting Incoming Orders](#) on page 4–16. Once you reject an order, the message is removed from the Requires Attention list.

Responding to Incoming Ask Messages

When you receive an incoming Ask message, you need to answer it using an Answer message. For more information, see [Sending an ANSwer Message](#) on page 4–21. The Ask message is used both to ask you a question and to request price changes.

If the incoming Ask message is requesting delivery confirmation, you can answer it using the Delivery Confirmation message (which is sent as an Answer message). For more information, see [Delivery Confirmation Message \(ANS\)](#) on page 4–27.

Once you answer the message, it will be automatically acknowledged and removed from the Requires Attention list.

Responding to Incoming Answer Messages

If you receive an incoming Answer message, you can either send another Ask message to the florist (see [Sending an ASK Message](#) on page 4–19) or acknowledge the message so it no longer appears in your Requires Attention list (see [Acknowledging Messages](#) on page 4–15).

Responding to Incoming Cancel Messages

When you receive an incoming Cancel message, the sending florist is asking you to cancel their order. There are two responses you can send: Confirm (see [Sending a CONFirmation Message](#) on page 4–26) if you agree to cancel the order, or Deny ([Sending a DENy Message](#) on page 4–30) if you will not agree to cancel the message. Typically, you should confirm the cancellation unless you have already begun work on the order.

Once you confirm or deny the message, it will be removed from the Requires Attention list.

Responding to Incoming Confirm Messages

When you receive an incoming Confirm message, the filling florist has agreed to your request to cancel the order. You can then acknowledge the message to remove it from your Requires Attention list. For more information, see [Acknowledging Messages](#) on page 4-15.

After you have acknowledged the Confirm message, you should either cancel the order in Order Entry or send it to another florist in Order Entry. In either case, double-click the message to open it in Order Entry and perform the necessary tasks. For more information, see [Cancelling Orders](#) on page 9-83.

Responding to Incoming Deny Messages

If you receive an incoming Deny message, the filling florist to whom you sent the Cancel message is indicating that they are unable/unwilling to cancel the order. In the overwhelming majority of cases, this is because work has already begun on the order. You can acknowledge the message to remove it from your Requires Attention list. For more information, see [Acknowledging Messages](#) on page 4-15.

Responding to Incoming Reject Messages

When you receive an incoming Reject message, the florist to whom you sent the order cannot fill it. In many cases, when this happens, the florist will automatically forward it to another florist. However, if you receive an incoming Reject message, that did not happen. You need to open the order in Order Entry (by double-clicking it from the Message Center results list) and either select a new filling florist or cancel the order. For more information, see [Cancelling Orders](#) on page 9-83.

Although you can also acknowledge the incoming Reject message (for more information, see [Acknowledging Messages](#) on page 4-15 for details), the original order message will still appear in the Requires Attention list until you either cancel it or send it to another florist.

Responding to Incoming Forward Messages

When you receive an incoming Forward message, it is to let you know that an order you sent was forwarded to another florist. The incoming Forward message includes information about the florist who received the order. You need to acknowledge the message to remove it from your Requires Attention list.

Responding to Outgoing Orders

Although there are fewer possible scenarios dealing with outgoing orders, you can also respond to outgoing orders for the following scenarios:

- » Requesting a price change. If you need to update a price after the initial order was sent (for example, the customer wants to add more money to the order), you need to respond using a Price Change request. [Requesting a Price Change](#) on page 4-15
- » Sending an order cancellation. If you need to send a cancellation message after the order has been sent, you need to respond with a Cancel message. [Sending a CANCEL Message](#) on page 4-24.

If you send a Cancel message to a florist, the order is automatically marked as incomplete. You can then double-click that order in Message Center to open it in Order Entry, allowing you to either cancel the order in or send the order to a new florist. Until you cancel or resend the order, the order will appear in Message Center as requiring attention.

IMPORTANT It is customary to wait for a Confirm message when you send a Cancel message, but it is not necessary to receive it in order to cancel it in your system or resend it to a different florist.

- » Sending an Ask message to the filling florist. The majority of time, this is to inquire about the order's delivery status. For more information, see [Sending an ASK Message](#) on page 4-19.

Requesting a Price Change

A possible response to a message is to request a price change. You can do this as the filling florist (the more common scenario), or as the sending florist wanting to update a price after the initial order was sent.

TASK **To request a price change:**

- 1 Open **Message Center** and perform a search to locate the order message for which you are requesting a price change.
- 2 Select the message from the results list and click the **Respond** button.
- 3 Select **Price Change**. The **Create Ask Message** window opens.
- 4 Enter information for the price change and click **Send**.

Acknowledging Messages

Acknowledging messages allows you to remove messages from the requires attention list without having to send a message in reply. Essentially, it allows you to mark that you have read the message.

You can acknowledge the following Mercury Message types:

- » Incoming Ask (ASK) messages
- » Incoming Answer (ANS) messages
- » Incoming Deny (DEN) messages
- » Incoming Reject (REJ) messages (although you can acknowledge this message, you must still either cancel the order or resend it to remove the message from the Requires Attention list)
- » Incoming Confirmation (CON) messages
- » Incoming Forward (FOR) messages
- » Incoming General (GEN) messages

When you acknowledge a message, the Acknowledgement window opens. You can then select your employee name from the Employee list, and then click Save to save the Acknowledgement. Once you acknowledge a message, it no longer shows up under the requires attention list and the message status is set to Acknowledged.

If you acknowledge a message that is associated with an already attached (opened in Order Entry via Message Center) order, the acknowledgement is recorded in Order Notes for the order.

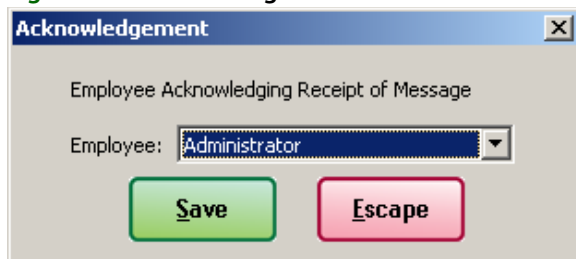
NOTE You cannot acknowledge a message that has previously been acknowledged; that option is no longer available as a response.

When you send an Answer message as a response to an Ask message, the Ask message is automatically acknowledged. Delivery Confirmation messages are automatically acknowledged when they are received.

Acknowledgement Window

The Acknowledgement window opens when you respond to a message and select Acknowledge as the response.

Figure 4-3: Acknowledgement Window



You can only acknowledge the following message types:

- » Incoming Answer (ANS) messages
- » Incoming Deny (DEN) messages
- » Incoming Reject (REJ) messages
- » Incoming Confirmation (CON) messages
- » Incoming Forward (FOR) messages
- » Incoming General (GEN) messages

When you acknowledge a message, the Acknowledgement window opens. You can then select your employee name from the Employee list, and then click Save to save the Acknowledgement. Once you acknowledge a message, it no longer shows up under the requires attention list and the message status is set to Acknowledged.

If you acknowledge a message that is associated with an already attached (opened in Order Entry via Message Center) order, the acknowledgement is recorded in Order Notes for the order.

NOTE You cannot acknowledge a message that has previously been acknowledged; that option is no longer available as a response.

Rejecting Incoming Orders

You may need to reject an incoming order. Some reasons for doing so include it is past your delivery cutoff time, the order is outside of your delivery area, or you do not have the product requested.

IMPORTANT You should forward the order to another florist instead of rejecting it if another florist can fill the order instead. Only reject an order if you feel that no other florist can fill it. For more information, see [Sending a FORward Message](#) on page 4-32.

- TASK** To reject an incoming order in Message Center:
- 1 Enter search criteria to locate the incoming order message. Click **Search**.
 - 2 In the results list, select the message, click Respond, and then select Reject from the pop-up menu. The **Create REJ Message** window opens.
 - 3 Fill out the window and click **Send**.

For more information, see [Sending a REJect Message](#) on page 4-34.

Deleting Messages from Message Center

Certain messages can be deleted from Message Center entirely:

- » General (GEN) messages
- » Unattached, non-FTD orders

In the case of General messages, this allows you to keep the Message Center organized. For users who also send with non-FTD wire services, this allows you to remove order messages that would otherwise appear in the Requires Attention list.

TASK To remove a message from Message Center:

- 1 In **Message Center**, right-click on the message and select **Delete Message**.
- 2 You are informed you are about to remove the message and will no longer be able to access it. Click **Yes** to confirm the deletion.

Printing Messages

TASK To print a Mercury Message:

- 1 On the FTD Mercury Main Menu, in the Search area, click Message. You can also click Message Center from a blank Order Entry or Point of Sale window. The **Message Center** window opens.
- 2 Select search parameters to locate the message and click **Search**.
- 3 From the **Mercury Message Log**, select the message you want to print. The message will display in the **Message Area**.
- 4 Click **Print Message**.

A single copy of the selected Mercury Message prints to the Mercury Message printer. If no printer is configured as the Mercury Message printer, the message prints to the default Windows printer.

Mercury Order Message

The Mercury Order message allows you to send an order to another Member florist. You may need to send orders to another florist if a customer requests that a delivery be made outside your delivery area. You create a Mercury Order message by creating a wire out order in Order Entry or Point of Sale.

IMPORTANT The preferred way of sending a Mercury Order message is by creating a wire out order in Order Entry or Point of Sale.

Helpful Hints on Sending a Mercury Order

Following are a few hints to keep in mind when sending a Mercury order:

- » Avoid using "same" as a second choice product. *Similar* is acceptable.
- » If you want to perform a Closest City Search while completing an order, see [Closest City Search](#) on page 5–11. A Closest City Search is used to find cities nearby any city in the United States. This feature is useful if there is no Mercury florist in the recipient's city or if there are no florists with an appropriate status in that city.
- » Retrans fees are applied to Retrans orders automatically. *Do not* enter the Retrans fee on the order; however, collect the payment from the customer. You are billed for the Retrans fee on your Clearing House statement. (See [FTD International Retrans Service](#) on page 3–2 for more information.)

- » If an outgoing Mercury Order message is rejected by the host, the Rejected notification on the message prints in a large font so it is noticeable.

Auto Select

The Auto Select feature allows FTD Mercury to select a filling florist for you based on location of the recipient, status of the filling florist, and the product and price of the first choice product on the order. To automatically select a filling florist, click the **Auto Select** button in the **Filling Florist Information** section of the screen.

The following criteria are used to select a filling florist:

- » The recipient's ZIP code.
- » The status of the filling florist (the system will NOT select a florist that is marked as NOT PREFERRED).
- » The first choice product code (the florist must carry the first choice product code). If the first choice product is not indicated at the time that you click the **Auto Select** button, then the first choice product will not be criteria for selecting the filling florist.
- » The price including delivery (the price must meet the florist's minimum ORDER amount requirement AND meet the florist's minimum PRODUCT amount requirement). If the price is not indicated at the time that you click the **Auto Select** button, then price will not be criteria for selecting the filling florist.

If multiple florists meet the requirements listed above, then the following will determine which florist is selected to fill the order:

- » Preferred status (First Choice florists are selected first, then Preferred, then Normal).
- » Reciprocity count (number of orders) or dollar amount (total dollar amount of orders), depending on your system's reciprocity configuration (see "[General Features](#)" on page 613). Reciprocity counts and dollar amounts are calculated on a daily basis.
- » Directory listing order (the directory rotates florists on a quarterly basis).

Recording a Phoned-In Order

Phoned-in orders should be recorded so that you can get paid for taking the order (on your Clearinghouse Statement). When you correctly record a phoned in order, the order is placed in the REC message window automatically so that it can be sent to FTD for payment.

Phoned-in orders should also be recorded for reconciliation purposes. Phoned-in orders are placed in the Mercury message log with a status of Phoned. When you reconcile, the order is in your message list so that you can match it with the order on the Clearinghouse Statement.

For more information on taking a phoned-in order, see [Entering Phoned-In Orders](#) on page 9-24.

Message Responses

Depending on the type of message being responded to, similar windows open when you select the message type from the Mercury Message menu. Messages that use this type of window include:

- » ASK ([Create ASK Message Window](#))
- » ANSwer ([Create ANS Message Window](#))
- » CANcellation ([Create CAN Message Window](#))
- » CONfirm ([Create CON Message Window](#))

- » DENy ([Create DEN Message Window](#))
- » FORward ([Create FOR Message Window](#))
- » REJect ([Create REJ Message Window](#))

Message Response Window

This window is used to respond to a Mercury Message. The message types that use this window are the ASK, ANSwer, CANcellation, CONFirm, DENy, FORward, and REJect messages.

TASK To complete a message response:

- 1 If necessary, change the recipient's name and address.
- 2 If you are requesting or confirming a price change (ASK and ANSwer messages only), click the **New Price** check box and enter the new price. You may click the calculator icon to help you compute the new price.
- 3 In the **Reason** field, click the down arrow to highlight and select the reason you are sending this message.
- 4 If you are forwarding a message, enter the shop code of the florist you are forwarding the message to in the **Florist** field. You may click ... to search for a florist.
- 5 Add notes (if any), in the **Notes** field.
- 6 In the **Operator** field, click the down arrow and select your name from the list.
- 7 If you have multiple stores, click the down arrow in the **Sending Florist** field and select the sending store code from the list.
- 8 Click **Send**.

ASK Message

The ASK message allows you to make order-related inquiries or to request a price change. If the message is used to indicate a price change, it must be sent in the same calendar month as the original order. Sending the ASK message within the same calendar month allows the program to correct the price for Clearing House billing. (If you have questions regarding Mercury messages and the FTD Clearing House, see your *FTD Member Owner Handbook* for more information.) If the filling Member requests a price change, the sending Member must send an ANSwer message stating the new price. Only then will the price be adjusted on the Clearing House billing.

Sending an ASK Message

TASK To send an ASK message:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Message**. **Message Center** opens
- 2 Locate the order message for which you are creating your ASK message. For information on searching for messages in Message Center, see [Searching for Mercury Messages](#) on page 4-2.
- 3 When you locate the message, right-click on the message in the list and click **ASK**. The **Create ASK Message** window appears with most of the information completed for you.
- 4 Change any information, or add notes as needed. If you are requesting a price change, click **New Price** and type the new price.
- 5 Click **Send**.

The system prints a verified copy of the message on your Mercury printer once the message has been received by the Host Computer (unless you have specified otherwise in Mercury Administration). The verified copy includes the Mercury number.

Create ASK Message Window

Figure 4-4: Create ASK Message Window

The ASK message allows you to make order-related inquiries or to request a price change. If the message is used to indicate a price change, it must be sent in the same calendar month as the original order. Settings for this window are described below.

Order Information

Table 4-8: Order Information Settings

Setting	Description
Order Date	Displays the date of the original order.
Number	Displays the Mercury number of the original order. You can also click the Search button (...) to search for the Mercury # in Message Center. When you find the message in Message Center and double-click it in the results list, this field will automatically populate with the selected message's Mercury #.

Recipient Information

In this area, enter the recipient's name and address in the appropriate fields.

Message Information

Table 4-9: Message Information Settings

Setting	Description
Delivery Date	Enter the delivery date. You can also click the arrow to display a calendar, from which you can select the delivery date.
New Price	If you are requesting a new price for the order, select this option and enter the new price in the text box.
Reason	Select the reason you are sending this message.

Detailed Florist Information

This area contains information about the sending florist, including their shop code and contact information.

Notes

Enter any additional information for this message in this area.

Operator Information

Table 4-10: Operator Settings

Setting	Description
Operator	Select the name of the employee sending this message.
Sending Florist	By default, your store name appears selected in this list. If you have multiple stores, select the name of the store sending this message.

Click the Ord. Detail button to open the Order Detail View window.

ANSwer Message

The ANSwer message allows you to respond to a question, comment, or price change request. ANSwer messages should only be used to respond to ASK messages.

Sending an ANSwer Message

TASK To send an ANSwer message:

- 1 On the FTD Mercury Main Menu, in the Search area, click Message. You can also click Message Center from a blank Order Entry or Point of Sale window. The Message Center opens.
- 2 Perform a search to locate the message to which you want to respond. For more information, see [Searching for Mercury Messages](#) on page 4-2.
- 3 Select the message from the results list and click **Respond**.
- 4 The **Create ANS Message** window appears with most of the information completed for you.
- 5 Change any information or add notes as needed. If you are answering a price change, click **New Price** and type the new price to confirm.
- 6 Click **Send**.

The system prints a verified copy of the message on your Mercury printer once the message has been received by the Host Computer (unless you have specified otherwise in Mercury Administration). The verified copy includes the Mercury number.

Create ANS Message Window

Figure 4-5: Create ANS Message Window

The screenshot shows a dialog box titled "Create ANS Message". It contains the following fields and controls:

- Order Information:** "Order Date:" (empty), "Number:" (C4433C-0000) with a search button (...).
- Recipient Information (F3):** "Name:" (empty), "Address:" (empty text area).
- Delivery Date:** 1 /31/2008 (dropdown), "New Price (F5) \$0.00" (checkbox and text), "Reason:" (empty dropdown).
- Detailed Florist Information (F2):** "Florist" (empty) with a search button (...).
- Notes:** A large empty text area.
- Operator:** Administrator (dropdown), "Sending Florist:" 90-5893AF (dropdown).
- Buttons:** "Send (F9)", "Ord_Detail", "Escape".

Order Information

Table 4-11: Order Information Settings

Setting	Description
Order Date	Displays the date of the original order.
Number	Displays the Mercury number of the original order. You can also click the Search button (...) to search for the Mercury # in Message Center. When you find the message in Message Center and double-click it in the results list, this field will automatically populate with the selected message's Mercury #.

Recipient Information

In this area, enter the recipient's name and address in the appropriate fields.

Message Information

Table 4-12: Message Information Settings

Setting	Description
Delivery Date	Enter the delivery date. You can also click the arrow to display a calendar, from which you can select the delivery date.
New Price	If you are requesting a new price for the order, select this option and enter the new price in the text box.
Reason	Select the reason you are sending this message.

Detailed Florist Information

This area contains information about the sending florist, including their shop code and contact information.

Notes

Enter any additional information for this message in this area.

Operator Information

Table 4-13: Operator Settings

Setting	Description
Operator	Select the name of the employee sending this message.
Sending Florist	By default, your store name appears selected in this list. If you have multiple stores, select the name of the store sending this message.

Click the Ord. Detail button to open the Order Detail View window.

CANcellation Message

The CANcellation message allows you to request that a filling Member or the Host Computer cancel a previously sent order. If the CANcellation message is sent before the order is processed by the Host Computer, the Host cancels the order (and does not transmit to the filling florist) and sends you a confirmation of the cancellation.

However, if the CANcellation message reaches the Host after the order has been processed and sent to the filling Member, the filling Member receives the CANcellation request (the incoming CANcellation message) and can either CONFIRM or DENY the request.

If you send a Cancel message to a florist, the order is automatically marked as incomplete. You can then double-click that order in Message Center to open it in Order Entry, allowing you to either cancel the order in or send the order to a new florist. Until you cancel or resend the order, the order will appear in Message Center as requiring attention.

IMPORTANT It is customary to wait for a Confirm message when you send a Cancel message, but it is not necessary to receive it in order to cancel it in your system or resend it to a different florist.

Sending a CANcel Message

TASK To send a CANcel message:

- 1 On the FTD Mercury Main Menu, in the Search area, click Message. You can also click Message Center from a blank Order Entry or Point of Sale window. The **Message Center** opens.
- 2 Perform a search to locate the message to which you want to respond. For more information, see [Searching for Mercury Messages](#) on page 4-2.
- 3 Select the message from the results list and click **Respond**.
- 4 From the menu, click **Cancel**. The **Create CAN Message** window appears with most of the information completed for you.
- 5 Change any information or add notes as needed.
- 6 Click **Send**.

The system prints a verified copy of the message on your Mercury printer once the message has been received by the Host Computer (unless you have specified otherwise in Mercury Administration). The verified copy includes the Mercury number.

Create CAN Message Window

Figure 4-6: Create CAN Message Window

The screenshot shows the 'Create CAN Message' window with the following fields and values:

- Order Information:**
 - Order Date: Thursday, January 31, 2008
 - Number: C4996G-0140
- Recipient Information (F3):**
 - Name: Billy Blythe
 - Address: 3113 WOODCREEK DR
DOWNERS GROVE, IL 60515-5412
- Delivery Date:** 1 /31/2008
- New Price (F5):** \$69.99
- Reason:** (empty dropdown)
- Detailed Florist Information (F2):**
 - Florist: 75-0370AE
- Notes:** (empty text area)
- Operator:** Administrator
- Sending Florist:** 90-5893AF

Buttons at the bottom: Send (F9), Ord. Detail, Escape

Order Information

Table 4-14: Order Information Settings

Setting	Description
Order Date	Displays the date of the original order.
Number	Displays the Mercury number of the original order. You can also click the Search button (...) to search for the Mercury # in Message Center. When you find the message in Message Center and double-click it in the results list, this field will automatically populate with the selected message's Mercury #.

Recipient Information

In this area, enter the recipient's name and address in the appropriate fields.

Message Information

Table 4-15: Message Information Settings

Setting	Description
Delivery Date	Enter the delivery date. You can also click the arrow to display a calendar, from which you can select the delivery date.
New Price	If you are requesting a new price for the order, select this option and enter the new price in the text box.
Reason	Select the reason you are sending this message.

Detailed Florist Information

This area contains information about the sending florist, including their shop code and contact information.

Notes

Enter any additional information for this message in this area.

Operator Information

Table 4-16: Operator Settings

Setting	Description
Operator	Select the name of the employee sending this message.
Sending Florist	By default, your store name appears selected in this list. If you have multiple stores, select the name of the store sending this message.

Click the Ord. Detail button to open the Order Detail View window.

CONFIRMATION MESSAGE

The CONFIRMATION message allows you to confirm a cancellation request. For example, you may receive a CANCELLATION message requesting that an order not be filled. CONFIRMATION messages are optional. You do not have to send back a CONFIRMATION message if you receive a CANCELLATION message and are able to cancel the order.

However if you cannot cancel the order in time, you must send a DENY message to deny the cancellation (see [DENY Message](#) on page 4-30).

Sending a CONFIRMATION Message

TASK To send a CONFIRMATION message:

- 1 On the FTD Mercury Main Menu, in the Search area, click Message. You can also click Message Center from a blank Order Entry or Point of Sale window. The Message Center opens.
- 2 Perform a search to locate the message to which you want to respond. For more information, see [Searching for Mercury Messages](#) on page 4-2.
- 3 Select the message from the results list and click **Respond**.
- 4 From the menu, click **Confirm**. The **Create CON Message** window appears with most of the information completed for you.
- 5 Change any information or add notes as needed.
- 6 Click **Send**.

The system prints a verified copy of the message on your Mercury printer once the message has been received by the Host Computer (unless you have specified otherwise in Mercury Administration). The verified copy includes the Mercury number.

Create CON Message Window

Figure 4-7: Create CON Message Window

The screenshot shows the 'Create CON Message' window with the following fields and values:

- Order Information:**
 - Order Date: Thursday, January 31, 2008
 - Number: C4440D-0151
- Recipient Information (F3):**
 - Name: Jimmy Smith
 - Address: 3113 Woodcreek Dr
DOWNERS GROVE, IL 60515-5412
- Delivery Date:** 1 /31/2008
- New Price (F5):** \$49.99
- Reason:** (empty dropdown)
- Detailed Florist Information (F2):**
 - Florist: 75-0370AE
- Notes:** (empty text area)
- Operator:** Administrator
- Sending Florist:** 90-5893AF

Buttons at the bottom: Send (F9), Ord. Detail, Escape

Order Information

Table 4-17: Order Information Settings

Setting	Description
Order Date	Displays the date of the original order.
Number	Displays the Mercury number of the original order. You can also click the Search button (...) to search for the Mercury # in Message Center. When you find the message in Message Center and double-click it in the results list, this field will automatically populate with the selected message's Mercury #.

Recipient Information

In this area, enter the recipient's name and address in the appropriate fields.

Message Information

Table 4-18: Message Information Settings

Setting	Description
Delivery Date	Enter the delivery date. You can also click the arrow to display a calendar, from which you can select the delivery date.
New Price	If you are requesting a new price for the order, select this option and enter the new price in the text box.
Reason	Select the reason you are sending this message.

Detailed Florist Information

This area contains information about the sending florist, including their shop code and contact information.

Notes

Enter any additional information for this message in this area.

Operator Information

Table 4-19: Operator Settings

Setting	Description
Operator	Select the name of the employee sending this message.
Sending Florist	By default, your store name appears selected in this list. If you have multiple stores, select the name of the store sending this message.

Click the Ord. Detail button to open the Order Detail View window.

Delivery Confirmation Message (ANS)

The Delivery Confirmation message is an Answer (ANS) message that you send back to the sending florist, confirming that you delivered the order.

There are two ways you can send a Delivery Confirmation: automatic or manual.

Sending an Automatic Delivery Confirmation Message

NOTE Before you can send an automatic Delivery Confirmation message back to the sending florist, you must first ensure that Delivery Confirmation is enabled for the FTD house account.

The easiest way to send a Delivery Confirmation is to send it automatically in Order Entry or Point of Sale.

TASK To send a delivery confirmation automatically in Order Entry or Point of Sale:

- 1 In **Order Entry** or **Point of Sale**, attach the incoming order.
- 2 Click **Delivery Confirmation**. The **Delivery Information** window opens.
- 3 Select **Send Confirmation**.
- 4 Click **Save**.
- 5 Complete the order as usual.

When the order is marked delivered, the Delivery Confirmation message is sent to the sending florist automatically.

Sending a Manual Delivery Confirmation Message

TASK To send a manual delivery confirmation message:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Message**. **Message Center** opens.
- 2 Enter the search parameters to locate the order for which you are sending delivery confirmation and click **Search**.
- 3 From the results list, select the message and click **Respond**.
- 4 Select **Delivery Confirmation**. The **Delivery Confirmation Message (ANS)** window opens.
- 5 Fill out the information on the window and click **Send**.

The system prints a verified copy of the message on your Mercury printer once the message has been received by the Host Computer (unless you have specified otherwise in Mercury Administration). The verified copy includes the Mercury number.

Delivery Confirmation Message (ANS) Window

Figure 4-8: Delivery Confirmation Message (ANS) Window

The Delivery Confirmation message is an Answer (ANS) message that you send back to the sending florist, confirming that you delivered the order.

After filling in the necessary fields, click **Send** to send the message, or click **Escape** to close the window. You can also click **Ord. Detail** to view the detail of the Mercury order.

Following are descriptions of each setting on this window.

Order Information

This area displays the date of the order (read-only) and the Mercury number. You can type the number of the Mercury order in the Number field, or click the Search button (...) to open Message Center.

Recipient Information

This section contains fields for the recipient's name and address. Enter the information into the appropriate fields.

Detailed Florist Information

This area contains information about the florist who sent you the order.

Delivery Information

In the Delivery Information area, provide the following information:

Table 4-20: Delivery Information Fields

Field	Description
Date Delivered	Enter the date you delivered the order.

Table 4-20: Delivery Information Fields (cont.)

Field	Description
Delivery Time	Enter the time the order was delivered.
Product Description	Enter a description of the order.
Invoice	Enter the Order Entry number of the order, or any information that will help identify the order. This field is optional.
Driver	Enter the name of the driver who delivered the order. This field is optional.

Notes

Enter any additional notes in this area.

Operator Information

From the Operator list, select your employee name. The Sending Florist list, by default, displays your florist code. If you have multiple shops, select the shop from which you are sending this message.

Click the Ord. Detail button to open the Order Detail View window.

DENy Message

The DENy message allows you to refuse to accept a request to cancel an order. If a CONFirmation message is sent after a DENy message for the same order, the CONFirmation message overrides the DENy.

Sending a DENy Message

TASK To send a DENy message:

- 1 On the FTD Mercury Main Menu, in the Search area, click Message. You can also click Message Center from a blank Order Entry or Point of Sale window. The **Message Center** opens.
- 2 Perform a search to locate the message to which you want to respond. For more information, see [Searching for Mercury Messages](#) on page 4-2.
- 3 Select the message from the results list and click **Respond**.
- 4 From the menu, click **Deny**. The **Create DEN Message** window appears with most of the information completed for you.
- 5 Change any information or add notes as needed.
- 6 Click **Send**.

The system prints a verified copy of the message on your Mercury printer once the message has been received by the Host Computer (unless you have specified otherwise in Mercury Administration). The verified copy includes the Mercury number.

Create DEN Message Window

Figure 4-9: Create DEN Message Window

Order Information

Table 4-21: Order Information Settings

Setting	Description
Order Date	Displays the date of the original order.
Number	Displays the Mercury number of the original order. You can also click the Search button (...) to search for the Mercury # in Message Center. When you find the message in Message Center and double-click it in the results list, this field will automatically populate with the selected message's Mercury #.

Recipient Information

In this area, enter the recipient's name and address in the appropriate fields.

Message Information

Table 4-22: Message Information Settings

Setting	Description
Delivery Date	Enter the delivery date. You can also click the arrow to display a calendar, from which you can select the delivery date.
New Price	If you are requesting a new price for the order, select this option and enter the new price in the text box.
Reason	Select the reason you are sending this message.

Detailed Florist Information

This area contains information about the sending florist, including their shop code and contact information.

Notes

Enter any additional information for this message in this area.

Operator Information

Table 4-23: Operator Settings

Setting	Description
Operator	Select the name of the employee sending this message.
Sending Florist	By default, your store name appears selected in this list. If you have multiple stores, select the name of the store sending this message.

Click the Ord. Detail button to open the Order Detail View window.

FORward Message

The FORward message allows the filling Member to forward an order to an alternate Member for delivery. When you select an alternate Member, the network routes the order and billing to that Member.

NOTE You can forward orders to Mercury subscribers only.

Do not forward Mercury orders by telephone. If you do, you will remain the filling Member on the Clearing House billing statement. Using the FORward message allows the network to reassign the order to the Member actually filling the order.

Sending a FORward Message

TASK To send a FORward message:

- 1 On the FTD Mercury Main Menu, in the Search area, click Message. You can also click Message Center from a blank Order Entry or Point of Sale window. The Message Center opens.
- 2 Perform a search to locate the message to which you want to forward. For more information, see [Searching for Mercury Messages](#) on page 4-2.
- 3 Select the message from the results list and click **Respond**.
- 4 From the menu, click **Forward**. The **Create FOR Message** window appears with most of the information completed for you.

- 5 In the **Florist** field, type the shop code of the new filling florist (the florist to whom you are forwarding the message). To perform a Florist Search, click the search button to find a new filling florist.
- 6 Change any information or add notes as needed.
- 7 Click **Send**.

The system prints a verified copy of the message on your Mercury printer once the message has been received by the Host Computer (unless you have specified otherwise in Mercury Administration). The verified copy includes the Mercury number.

Create FOR Message Window

Figure 4-10: Create FOR Message Window

Order Information

Table 4-24: Order Information Settings

Setting	Description
Order Date	Displays the date of the original order.
Number	Displays the Mercury number of the original order. You can also click the Search button (...) to search for the Mercury # in Message Center. When you find the message in Message Center and double-click it in the results list, this field will automatically populate with the selected message's Mercury #.

Recipient Information

In this area, enter the recipient's name and address in the appropriate fields.

Message Information

Table 4-25: Message Information Settings

Setting	Description
Delivery Date	Enter the delivery date. You can also click the arrow to display a calendar, from which you can select the delivery date.
New Price	If you are requesting a new price for the order, select this option and enter the new price in the text box.
Reason	Select the reason you are sending this message.

Detailed Florist Information

This area contains information about the sending florist, including their shop code and contact information.

Notes

Enter any additional information for this message in this area.

Operator Information

Table 4-26: Operator Settings

Setting	Description
Operator	Select the name of the employee sending this message.
Sending Florist	By default, your store name appears selected in this list. If you have multiple stores, select the name of the store sending this message.

Click the Ord. Detail button to open the Order Detail View window.

REject Message

The REject message allows you to reject an order sent to you by another Mercury Member. Only a filling Member may reject an order. Prior to rejecting an order, review the guidelines for order rejection in the *FTD Member Owner Handbook*. You **must** send the REject message in the same calendar month as the date of the original order. This ensures the accuracy of the Clearing House statement. If you have questions regarding Mercury messages and the FTD Clearing House, see your *FTD Member Owner Handbook* for more information.

NOTE The preferred method of declining an order is to send a FORward message.

Sending a REject Message

TASK To send a REject Message:

- 1 On the FTD Mercury Main Menu, in the Search area, click Message. You can also click Message Center from a blank Order Entry or Point of Sale window. The Message Center opens.
- 2 Perform a search to locate the message to which you want to respond. For more information, see [Searching for Mercury Messages](#) on page 4-2.
- 3 Select the message from the results list and click **Respond**.
- 4 From the menu, click **Reject**. The **Create REJ Message** window appears with most of the information completed for you.

- 5 Change any information or add notes as needed.
- 6 Click **Send**.

The system prints a verified copy of the message on your Mercury printer once the message has been received by the Host Computer (unless you have specified otherwise in Mercury Administration). The verified copy includes the Mercury number.

Create REJ Message Window

Figure 4-11: Create REJ Message Window

Order Information

Table 4-27: Order Information Settings

Setting	Description
Order Date	Displays the date of the original order.
Number	Displays the Mercury number of the original order. You can also click the Search button (...) to search for the Mercury # in Message Center. When you find the message in Message Center and double-click it in the results list, this field will automatically populate with the selected message's Mercury #.

Recipient Information

In this area, enter the recipient's name and address in the appropriate fields.

Message Information

Table 4-28: Message Information Settings

Setting	Description
Delivery Date	Enter the delivery date. You can also click the arrow to display a calendar, from which you can select the delivery date.
New Price	If you are requesting a new price for the order, select this option and enter the new price in the text box.
Reason	Select the reason you are sending this message.

Detailed Florist Information

This area contains information about the sending florist, including their shop code and contact information.

Notes

Enter any additional information for this message in this area.

Operator Information

Table 4-29: Operator Settings

Setting	Description
Operator	Select the name of the employee sending this message.
Sending Florist	By default, your store name appears selected in this list. If you have multiple stores, select the name of the store sending this message.

Click the Ord. Detail button to open the Order Detail View window.

Miscellaneous Mercury Messages

The other Mercury messages that do not fall into the categories of orders or responses include:

- » [GENeral Message](#)
- » [ADJustment Report Message](#)
- » [REC Message List \(REC\)](#)
- » [SUSpend Message](#)
- » [RESume Message](#)
- » [RETrieval Message](#)

GENeral Message

The GENeral message allows you to use your FTD Mercury program to communicate with other Mercury Members, FTD Headquarters in Downers Grove, IL, or your FTD Field Service Representative (FSR).

GENeral messages are not relayed through the order relay center. If the receiving Member's component program is not working, the program rejects the GENeral message.

NOTE The transmission charge for sending a GENERAL message to another Member is based on the transmission priority you select. There is no transmission charge for sending a GENERAL message to FTD Headquarters or your FTD Field Business Consultant.

Sending a GENERAL Message

TASK To send a GENERAL Message:

- 1 On the **Mercury Message** menu, click **General (GEN)**.
- 2 In the **Filling Florist** field, type the florist code of the filling florist (the florist to whom you are sending the message) and press **TAB**, or click the search button to perform a Florist Search OR type the Mercury number of the FTD department or FSR.

NOTE For more information on performing a Florist Search, see [Searching for Florists](#) on page 5-3.

- 3 In the **Priority** field, click the arrow and select a priority level for this message.
- 4 In the **Text or Reason** field, type your message text.
- 5 In the **Operator** field, click the arrow and select your name from the list.
- 6 In the **Sending Florist** field, click the arrow and select your shop code (if you have multiple stores).
- 7 If all information is correct, click **Send**.

The system prints a verified copy of the message on your Mercury printer once the message has been received by the Host Computer (unless you have specified otherwise in Mercury Administration). The verified copy includes the Mercury number.

General Message Window

The GENERAL Message window allows you to use the Mercury Network to communicate with other Mercury Members, FTD Headquarters in Downers Grove, IL or your FTD Field Service Representative (FSR).

General Message Detail Window

Figure 4-12: General Message Detail Window

The screenshot shows a software window titled "General Message Detail". At the top, there is a field for "Filling Florist (F2):" with a search button (three dots). Below this is a large empty rectangular area. Underneath is a "Priority:" dropdown menu currently set to "Normal". Below that is a "Text or Reason" label followed by a large empty text area for the message content. At the bottom of the window, there are two dropdown menus: "Operator:" set to "Administrator" and "Sending Florist:" set to "90-5893AF DOC'S BLOOMS". At the very bottom are two buttons: "Send (F9)" and "Escape".

This window displays detail information of a GENERAL message that has been sent from or received by your shop. The GENERAL message is used to communicate with other Mercury Members, FTD Headquarters in Downers Grove, IL or your FTD Field Service Representative (FSR). The information in this window is read only and cannot be changed.

This window contains the following settings:

Table 4-30: GENERAL Message Detail Window Settings

Setting	Description
Filling Florist	Enter the code of the florist to whom you are sending the message. You can also click the search button (...) to search for the filling florist's shop code.
Priority	Select the priority for this message.
Text or Reason	Enter the text for the GENERAL message.
Operator	Select the name of the employee sending this message.
Sending Florist	Select the name of your store.

Click **Send** to send the message, or **Escape** to cancel the message without sending.

ADJUSTMENT Report Message

The ADJUSTMENT Report message allows only the sending Member to report an error on the Outgoing Orders section of the Combined Report.

IMPORTANT Do not file this report until you have contacted the filling Member and an agreement is reached concerning the error.

Do not file this report for errors listed in the Confirmation of Orders Filled (Incoming) section of the Combined Report. You should contact the sending Member, explain the error, and authorize the sending Member to file the Adjustment Report.

Sending an ADJUSTMENT Report Message

TASK To send an ADJUSTMENT Report Message:

- 1 On the **Mercury Message** menu, click **Adjust (ADJ)**.
- 2 In the **Combined Report #** field, type the report number of the Combined Report on which the error occurred. Type the number in the following format: NN-1 where NN is the month of the year. For example, 02-1 would be February's report.
- 3 In the **Recipient** field, type the name of the person who received the order.
- 4 Click either the **Mercury #** (Mercury program number) or the **ROF#** (Report of Orders Filled number) option, depending on what number you plan to use on the adjustment.
- 5 In the text box next to the **Mercury#** or **ROF#** option, type the number in the following format: ANNNNA (F2031J) for the Mercury program number or NNN-NN (071-09) for the Report of Orders Filled number.
- 6 In the **Filling Florist** field, type the code of the florist who filled the order and press **TAB**. To perform a Florist Search, click the search button (...) to find a filling florist.
- 7 In the **Delivery Date** field, change the date to the delivery date. To change the date, click the arrow to reveal a calendar, and click the delivery date.
- 8 In the **Order Amount** field, type the total price of the order. You may click the calculator icon to help you compute the price.

- 9 In the **Reason** field, click the arrow and select a reason for sending this message.
- 10 In the **Text or Reason** field, further explain the reason you chose (in step 9, above) and why you are filing this adjustment. You can also type any additional information here.
- 11 In the **Over/Under Chg** field, enter the correct order amount. Do not enter the difference.
- 12 In the **Operator** field, click the arrow and select your name from the list.
- 13 In the **Sending Florist** field, click the arrow and select your shop code (if you have multiple stores).
- 14 If all information is correct, click **Send**.

Adjustment Message (ADJ) Window

The ADJUSTMENT Report message allows only the sending Member to report an error on the Outgoing Orders section of the Combined Report.

Figure 4-13: Adjustment Message (ADJ) Window

This window contains the following settings:

Table 4-31: Adjustment Message (ADJ) Window Settings

Setting	Description
Combined Report #	Enter the report number of the Combined Report on which the error occurred. Enter the number in the format NN-1, where NN is the month of the year. For example, 02-1 would be the February run.
Recipient	Enter the name of the person who received the order.
ROF # / Mercury #	Select whether you are using the Report of Orders Filled number or Mercury number, and enter that number in the field to the right of the options.
Filling Florist	Enter the shop code of the florist who filled the order. You can also click the search button (...) to search for the florist's shop code.

Table 4-31: Adjustment Message (ADJ) Window Settings (cont.)

Setting	Description
Delivery Date	Enter the delivery date. You can click the arrow to reveal a calendar, from which you can select the delivery date.
Order Amount	Enter the total price of the order and delivery. Click the calculator icon to help compute the total amount.
Reason	From this list, select the reason you are filing this adjustment.
Text or Reason	Type a further reason or a more detailed explanation of why you are filing this adjustment.
Over/Under Chg	Enter the correct order amount. Do not enter the difference.
Operator	From this list, select your employee name.
Sending Florist	By default, your store name is displayed in this list. If you have multiple stores, select the sending store name.

Click **Send** to send the message; click **Escape** to close this window without saving changes.

REC Message List (REC)

The Rec Message List allows you to report Mercury orders that you receive by telephone to the FTD Clearing House. This eliminates the need to enter these orders on your Report of Orders Filled form. Use the Rec Message List to report phoned in FTD orders only. You may send Rec Messages in batches rather than individually, if you prefer.

All Mercury orders (including order relay orders) received through the Mercury Network are reported automatically. Do not report orders sent over the Mercury Network using this message. Interflora orders cannot be reported using the Rec Message List.

Phoned In orders entered in Order Entry and Point of Sale automatically added to the list of Rec Messages. (If you want to delete orders created in Order Entry or Point of Sale from the Rec Message List, you must cancel these orders in Order Entry or Point of Sale before you can delete them from the list.)

NOTE There is no transmission charge to the filling Member who submits a Rec Message List. If the sending Member uses the Rec Message List to report an order, a transmission fee is charged.

For Canadian systems, when creating REC messages for incoming phone orders from outside of Canada, FTD Mercury uses the amount of the order in the Phoned-In window and not the amount converted to Canadian funds in the Order Entry window. If taxes are included on an incoming order, the amount in the REC message will be the order total including the taxes.

Sending a REC Message

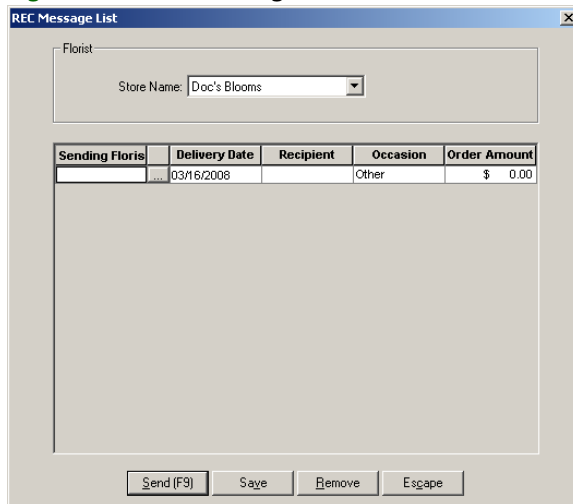
TASK To send a REC Message:

- 1 On the **Mercury Message** menu, click **Rec Message List (REC)**. The **REC Message List** window opens.
- 2 In the **Store Name** field, click the arrow and choose the store from which you are sending this message.
- 3 In the **Sending Florist** column, type the sending shop code (the shop that sent you the order) and press **TAB**. You can type the code in one of the following formats: NN-NNNNAA or NNNNNNAA where N is a number and A is a letter. For example, 90-1234AA. You may click the search button to perform a Florist Search.

- 4 To change the delivery date, click to the right side of the **Delivery Date** column, to reveal two sets of arrows. Highlight the month with your mouse, then click the up and down arrows until the correct month displays. Do the same for the day and year. Or, click the arrow to reveal a calendar and click on the delivery date.
- 5 In the **Recipient** column, type the full name of the person who received the order.
- 6 Click to the right side of the **Occasion** column to reveal a down arrow. click the arrow and select the occasion for this order.
- 7 In the **Order Amount** column, enter the total price of the order. You may click to the right side to reveal the calculator icon to help you compute the price.
- 8 Click **Save** to save your Rec Message List. The next time you open this window, it will contain all saved Rec messages. You can then click **Send** at any time when you are ready to send your Rec Message List to the Clearing House. It is strongly recommended that you send your Rec Message List before the end of each month so your Combined Report Statement will be correct.

REC Message List Window

Figure 4-14: REC Message List Window



You can configure the following settings in the REC Message List window:

Table 4-32: REC Message List Window Settings

Setting	Description
Store Name	From this list, select the store for which you are sending this message.
Sending Florist	Enter the sending shop code (the shop that sent you the order).
Delivery Date	To change the delivery date, click on the right side of this column to reveal two sets of arrows. Use these arrows to select the delivery date.
Recipient	Enter the name of the person who received the order.
Occasion	Click in this column and select the occasion for the order from this list.
Order Amount	Enter the total amount for this order.

Click **Send** to send the orders to the Clearing House. You should do this near the end of each month so your statement is correct. Click **Save** to save changes you made in this window. Click **Remove** to remove the selected order from the list. Click **Escape** to close this window.

SUSpend and RESume Messages

The SUSpend Message is used to suspend your system from receiving orders temporarily. FTD Mercury will continue to process administrative messages while the SUSpend message is in effect. The RESume Message activates FTD Mercury so it can receive orders earlier than the date and time specified in the SUSpend Message.

SUSpend Message

The SUSpend message allows you to suspend FTD Mercury temporarily from receiving orders or messages. Administrative messages will continue to be received during the suspension period. The Host Computer automatically forwards orders sent to your console to other Mercury Members. Orders that have a delivery date after the suspension period will be transmitted to your store. Flowers All Hours orders are not affected by the suspension.

Sending a SUSpend Message

TASK **To send a SUSpend Message:**

- 1 On the **Mercury Message** menu, click **Suspend (SUS)**.
- 2 In the **Suspend** area:
 - a. In the **From Date** field, click the arrow to reveal a calendar, and select the date you want to stop receiving orders.
 - b. In the **Time** field, change the time to the time you want to stop receiving orders. To change the time, highlight the hour with your mouse, then click the up and down arrows until the correct hour displays. Do the same for the minutes and AM/PM.
- 3 In the **Resume** area:
 - a. In the **To Date** field, click the arrow to reveal a calendar, and select the date you want to resume receiving orders.
 - b. In the **Time** field, change the time to the time at which you want to resume receiving orders. To change the time, highlight the hour with your mouse, then click the up and down arrows until it displays the correct hour. Do the same for the minutes and AM/PM.
- 4 In the **Operator** field, click the arrow and select your name from the list.
- 5 Click **Send**.

Suspend Message (SUS) Window

Figure 4-15: Suspend Message (SUS) Window

The Suspend Message (SUS) window contains the following settings:

Table 4-33: Suspend Message (SUS) Window Settings

Setting	Description
From Date	Enter the date you want FTD Mercury to begin suspending messages. You can also click the arrow to reveal a calendar, from which you can select the date.
Time	Enter the time on the selected date you want FTD Mercury to begin message suspension.
To Date	Enter the date on which you want FTD Mercury to begin receiving messages again. You can also click the arrow to reveal a calendar, from which you can select the date.
Time	Enter the time on the selected day you want FTD Mercury to begin receiving messages again.
Operator	From this list, select your employee name.
Sending Florist	If you have multiple stores, select the store for which you are sending this SUSpend message.

Click **Send** to send the SUSpend message, or click **Escape** to cancel the message without sending.

RESume Message

The RESume message allows your program to receive orders earlier than the date and time that you specified in your SUSpend message. FTD Mercury will continue to process administrative messages while the SUSpend message is in effect.

Sending a RESume Message

TASK To send a RESume Message:

- 1 On the **Mercury Message** menu, click **Resume (RES)**.
- 2 In the **Resume** area:

- a. In the **To Date** field, click the arrow to reveal a calendar, and select the date you want to resume receiving orders.
 - b. In the **Time** field, change the time to the time at which you want to resume receiving orders. To change the time, highlight the hour with your mouse, then click the up and down arrows until the correct hour displays. Do the same for the minutes and AM/PM.
- 3 In the **Operator** field, click the arrow and select your name from the list.
 - 4 Click **Send**.

Resume Message (RES) Window

NOTE When sending a RESume message, the Suspend area is disabled.

Figure 4-16: Resume Message (RES) Window

The Resume Message (RES) window contains the following settings:

Table 4-34: Resume Message (RES) Window Settings

Setting	Description
To Date	Enter the date on which you want FTD Mercury to begin receiving messages again. You can also click the arrow to reveal a calendar, from which you can select the date.
Time	Enter the time on the selected date you want FTD Mercury to begin receiving messages again.
Operator	From this list, select your employee name.
Sending Florist	If you have multiple stores, select the store for which you are sending this RESume message.

Click **Send** to send the RESume message, or click **Escape** to cancel the message without sending.

RETrieval Message

The RETrieval Request message allows you to retrieve previously transmitted messages. You should use the manual RETrieval message if one of the following occurs:

- » You are missing sequence number
- » You want to retrieve a copy of a prior transmission for your records

Normally, you may retrieve a maximum of 22 messages per request. During holiday periods, the maximum may be reduced. When necessary, the retrieval procedure may be temporarily restricted.

You are able to complete a RET for approximately four to six weeks after the message was originally sent or received. After this time period, you will need to request the information from the archive file, which a Mercury Technology Assistance Center representative can view and print to be mailed or faxed to you.

Sending a RETrieval Message

TASK To send a RETrieval Message:

- 1 On the **Mercury Message** menu, click **Retrieval (RET)**.
- 2 In the **From Order Number** field, enter the number of the last "good" order or message you sent or received if you were requesting the RETrieval message due to missing sequence numbers.

NOTE Typing an order number into this field and leaving the To Order Number field empty allows you to retrieve all messages from the number you typed in through the last message you sent or received.

- 3 In the **To Order Number** field, you may do one of the following:
 - » Type the same order or message and sequence number that you entered in the **From Order Number** field if you want to retrieve just that specific order or message.
 - » Type a different order or message and sequence number if you want to retrieve a range of orders or messages.
 - » Leave this field blank to retrieve all messages (from the order number you entered into the **From Order Number** field through the last message you sent or received).
- 4 Select one of the following:
 - » **Retrieve SENT Messages.** This option prompts the Host Computer to retrieve a copy of orders and messages that were sent over FTD Mercury (starting with the indicated order or message number).
 - » **Retrieve RECEIVED Messages.** This option prompts the Host Computer to retrieve a copy of orders and messages that were received over FTD Mercury (starting with the indicated order or message number).
 - » **Retrieve ALL Messages.** This option prompts the Host Computer to retrieve a copy of all orders and messages that were sent and received over FTD Mercury (starting with the indicated order or message number).

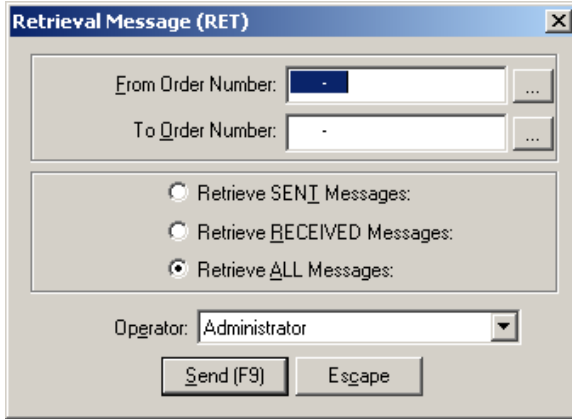
NOTE It is strongly recommended that you use the Retrieve ALL Messages option if your FTD Mercury program experiences a temporary printer problem or if you are missing sequence numbers.

- 5 In the **Operator** field, click the arrow and select your user name from the list.
- 6 If all information is correct, click **Send**.

Retrieval Message (RET) Window

The RETrieval Message window is used to retrieve previously received orders or messages. You may want to send this message type if you are missing sequence numbers. You should not use a Retrieval message if you just want to print a copy of a previous message for your records; instead, use Message Center to search for the message and print a copy of it.

Figure 4-17: Retrieval Message (RET) Window



The Retrieval Message window contains the following settings:

Table 4-35: Retrieval Message (RET) Window Settings

Setting	Description
From Order Number	Enter the number of the last “good” order message you sent or received. You can also click the Search button (...) to launch Message Center and select a message. When you select one in Message Center, when you return to this window, the Mercury # of the message you selected will automatically be populated in this field.
To Order Number	Enter the same order number you entered in the From Order Number field to retrieve that specific order or message. You can also type a different number to retrieve a range of orders and messages. To retrieve all messages, leave this field blank. You can also click the Search button (...) to launch Message Center and select a message. When you select one in Message Center, when you return to this window, the Mercury # of the message you selected will automatically be populated in this field.
Message Types to Retrieve	Select whether you want to retrieve sent messages, received messages, or all messages within the specified message number range.
Operator	Select your employee name from this list.

Order Detail View Window

Figure 4-18: Order Detail View Window

The screenshot shows a software window titled "Order Detail View" with a blue title bar and a close button (X) in the top right corner. The window contains several tabs: "Order" (selected), "Header/Footer", and "Additional". The "Order" tab displays the following information:

- Order Number: A2923V-0208
- Priority: FTO
- Sending Florist: 90-0001EE
- Occasion: Other
- Status: Received
- Price Includes Delivery: 39.45 US\$
- Recipient Information: Mindy Williams, 3113 Woodcreek Dr, DOWNERS GROVE, IL 60515-5412, 630-630-6300 Ext:- 1234
- Delivery Date: Wednesday, February 13, 2008
- First Choice: .BH FTD Big Hug Bouquet
- Second Choice: none
- Card Message: Hugs & Kisses! - Mark
- Special Instructions: (empty field)

At the bottom of the window, there are two buttons: "Print" and "Close".

This window displays detail information of an order that has been sent from or received by your shop. It opens when you click the Ord. Detail button in message creation windows (such as Create ASK Message, Create CON Message, etc.). The information in the tabs are read only and cannot be changed. To change an order, you must send another Mercury message.

Order Tab

Some important fields in this tab are described below. For information on a particular field in this window, right click on that particular field.

- » Order Number: Displays the number of the order (as assigned by your system).
- » Status: The current status of the order. An asterisk (*) next to a status type signifies that the status may change (due to ASK and ANSWER messages in progress for example). Status types are:
 - » Received displays for an order that has been received by your shop.
 - » Sent displays for an order that has been sent from your shop.

- » Pending displays when the order has been sent, but has not yet been received by the filling florist.
- » Error displays when the order has been rejected.

Header/Footer Tab

This tab displays header and footer detail information of an order that has been sent from or received by your shop. The Mercury Network may display a message in the header or footer, such as error codes or warning messages.

The information in this window is read only and cannot be changed. To change an order or message, you must send another Mercury message type.

Additional Tab

This tab displays general order information: wire service name, sending and filling florist, and the operator name.

This information is read only and cannot be changed. To change an existing order or message, you must send a Mercury message.

Message Locate Error Window

This window will appear if FTD Mercury cannot find a message that corresponds to the message number that you entered (usually from a Create ASK Message or Create ANS Message window and entering an incorrect number for the message). This may also occur if the message has not had a chance to be recognized by the Host Computer, or if you entered the message number incorrectly.

Figure 4-19: Message Locate Error Window



The best way to locate a message is by searching for the message in Message Center. This way, you can locate the message and its corresponding message number. Select Go to Mercury Message Search and click OK.

Florist Directory & Search

Using the Florist Search, you can locate florists in the electronic version of the FTD Florist Directory. The electronic directory is sent to you quarterly; you should always install it promptly to ensure your FTD Mercury system has the most up-to-date florist information. FTD also provides bi-monthly updates to the directory between CD releases.

Bi-Monthly Directory Update

Florist Directory updates are available to download from the Internet. The directory is updated twice per month. Downloading the directory allows you to keep your Florist Directory current in between the quarterly updates that you receive on CD.

When a directory update is available to download, you will receive a GENeral message from FTD. At that point, you can download the directory. These instructions teach you how to download the update.

IMPORTANT You must have the latest directory CD installed before you can download the directory update. If you have not yet installed the latest directory from the CD, please do so before downloading.

Configuring Your System for Bi-Monthly Directory Updates

If you use the Internet to send and receive Mercury orders and messages, then your system is already configured to download directory updates. Skip to [Downloading Directory Updates](#) on page 5–2.

Determining Whether FTD Mercury Uses the Internet for Mercury Orders and Messages

TASK To determine whether your system is configured to use the Internet to send and receive Mercury orders and messages:

- 1 On the **FTD Mercury Main Menu**, on the **Tools** menu, click **Mercury Administration**. You can also double-click the **Mercury Administration** icon on your computer's desktop. A login window for Mercury Administration opens.
- 2 Enter your login name and password and click **Login**. **Mercury Administration** opens.
- 3 Double-click the **Communication** folder.
- 4 Double-click **Mercury Connection**.
 - » If **Internet Access** is selected, it means that you use the Internet to send and receive Mercury orders and messages. You do *not* have to set up any information to download the directory update. Proceed to [Downloading Directory Updates](#) on page 5–2.


- » If **Direct Dial Access** is selected, it means that you use the Ford Mercury Protocol to send and receive Mercury orders and messages. You will have to complete the configuration in the following section ([Configuring Your System for Updates](#)) so you can download the directory updates (you only have to set up the information once).

Configuring Your System for Updates

TASK To configure FTD Mercury for bi-monthly directory updates:

- 1 Access the **Internet** screen in **Mercury Administration**.
- 2 In **Internet Connection Type** section, select the connection type that you use to connect to the Internet. Your options are as described below:
 - » **Always Online:** The Always Online connection type means that your system is always connected to the Internet, and your computer does not have to “dial up” to connect. The three types of Always Online connections available are a LAN connection, cable modem connection, or a DSL connection.
 - » **Dial Up:** The Dial Up connection type means that your system will dial an access number to connect to the Internet.
 - » **Dial Client:** The Dial Client connection type means that you are using third-party software (only AOL is supported at this time) to connect to the Internet.
- 3 Depending on the option you chose in the **Internet Connection Type** section, you will have to complete the rest of the necessary information on this screen.
 - » If you chose **Always Online**, the **Permanent** section is active. You only have to complete this section if you are using a proxy server. If you are using a proxy server, click the **Proxy Server is Used** check box and the fields to the right become active. If you are unsure of your proxy server settings, contact your network administrator for the proxy server settings in this section.
 - » If you chose **Dial-Up**, the **Dial-Up Networking** section is active. In this section, select the name of the ISP company that you are using from the **Internet Service Provider** list. If the name of your ISP does not appear in this field, it means that it has not yet been set up. Exit Mercury Administration and set up your ISP before returning to this screen.
 - » If you chose **Dial Client** (choose only if you are using AOL), the **Dialing Client** section at the bottom of the window is active. From the **Name** list, select **AOL**. Leave the default of **60** seconds in the **Authentication Delay** field.
- 4 Click **Apply** to save your changes before exiting this screen.

Downloading Directory Updates

By default, the Mercury Technology Software Update Application (MTSUA) is configured to download directory updates automatically at approximately 3:00 A.M. You can determine if MTSUA is running by looking for the  icon in your system tray (in the lower right corner of your desktop, next to the time).


TASK To launch MTSUA if it is not running:

On the **Windows Start** menu, point to **All Programs**, then to **FTD Software**, and click **MTSUA**. **MTSUA** will launch and the icon will appear in the system tray.

Manually Downloading Directory Updates

If you want to manually download any available directory updates (for example, if your computer has been offline for a period of time and you do not want to wait until 3:00 A.M. for the automatic update), you can do so by launching MTSUA.

TASK To download the directory update:

- 1 Double-click the  icon in the system tray (the lower right hand corner of your computer's desktop, next to the time). The **Mercury Technology Software Update** window opens.
- 2 Click **Check for Updates**. The system downloads the update from the Internet.

The directory update is then complete.

Banner Ads

Banner Ads allow you to advertise your shop in the online Florist Directory. Sending florists see your Banner Ad when your shop is returned in the Florist Search results list. Ads are rotated every few seconds. Clicking on a Banner Ad highlights that florist in the Florist Search window.

Three types of ads are available: Gold, Silver, and Bronze. The price and type of ad depends on how often the ad is rotated, as well as the content of the ad. If you have an ad in the printed Florist Directory, you already have a Banner Ad in the online Florist Directory. If you have a Display Ad in the printed directory, you have a Gold Banner Ad in the online directory. Otherwise you have a Silver Banner Ad (6 inch or 4.5 inch list ad in the printed directory) or a Bronze Banner Ad (3 inch or 1.5 inch list ad in the printed directory).

If you do not already have a Banner Ad, you can work with Member Services to create an ad to be placed in the online directory. Call Member Services at 1-800-669-1000 for details.

NOTE

Florist directories beginning with November 2005 include Banner Ads in Florist search. For that reason, do not reinstall a florist directory dated August 2005 or earlier. For information on installing the florist directory, refer to the instructions printed on the CD jacket of the florist directory.

Banner Ads and Multiple Shop Codes

Banner Ads are tied to your shop code (including the suffix) so you can have multiple Banner Ads if you have multiple store locations. For example, you can have one Banner Ad for 90-9999AA and one for 90-9999AB (also served by). However only the banner ad for the location that displays in the florist search results will display. Therefore if you only have an ad for your main location and not one for your also served by listing, then no ad will display in a search that returns only the also served by listing.

Searching for Florists

When you need to find a filling florist, you perform a Florist Search. If you are in the middle of a wire out order, you will access the Florist Search from the Order Entry or Point of Sale window; otherwise, you can access Florist Search from the FTD Mercury Main Menu.

Florists who match all of the selected parameters appear in the results list. For this reason, you may want to start with a single parameter to search and narrow the results by adding subsequent parameters if there are too many results; if you start with too many parameters, you may find few florists who match your criteria in its entirety.

TASK **To search for a florist:**

- 1 In **Order Entry** or **Point of Sale**, in the **Florist** area, click the **Search** button (...). If you have already entered in the recipient's address, the Florist Search attempts to find a filling florist in the same city. Alternatively, on the **FTD Mercury Main Menu**, in the **Search** area, click **Florist**. The **Florist Search** window opens.
- 2 Select the parameter(s) you want to use for your search and enter values in their associated fields. You must select at least one of the following parameters: **City/State**, **Zip**, **Member Code**, **Florist Name**, **Phone**, or **Owner's Name**.
- 3 Refine your search, if necessary, by selecting one or more of the secondary parameters: minimum order amount, product/price, FTD-only florists, florists with Mercury terminals, and/or florists who deliver on Sundays.
- 4 Click **Search**.

Florists matching your search criteria are displayed in the results list. When you select a florist, details about that florist are displayed below the results list.

If you did not spell the city name correctly, the Close City Match window opens, listing city names that have a similar spelling. Select the correct city name and click **Select**. Or, if none of the names match your desired city, click **Escape** and try another search in the Florist Search window.

If you are unable to find a Mercury florist in the town you entered, you may need to perform a Closest City Search. See [Closest City Search](#) on page 5-11 for more information.

When you locate a florist through a Florist Search, you may also change a florist's status. When your Florist Search results display, click the current status of a florist in the list to change the status. A down arrow will display. Click the down arrow to highlight and select a new status.

Florist Search Tips

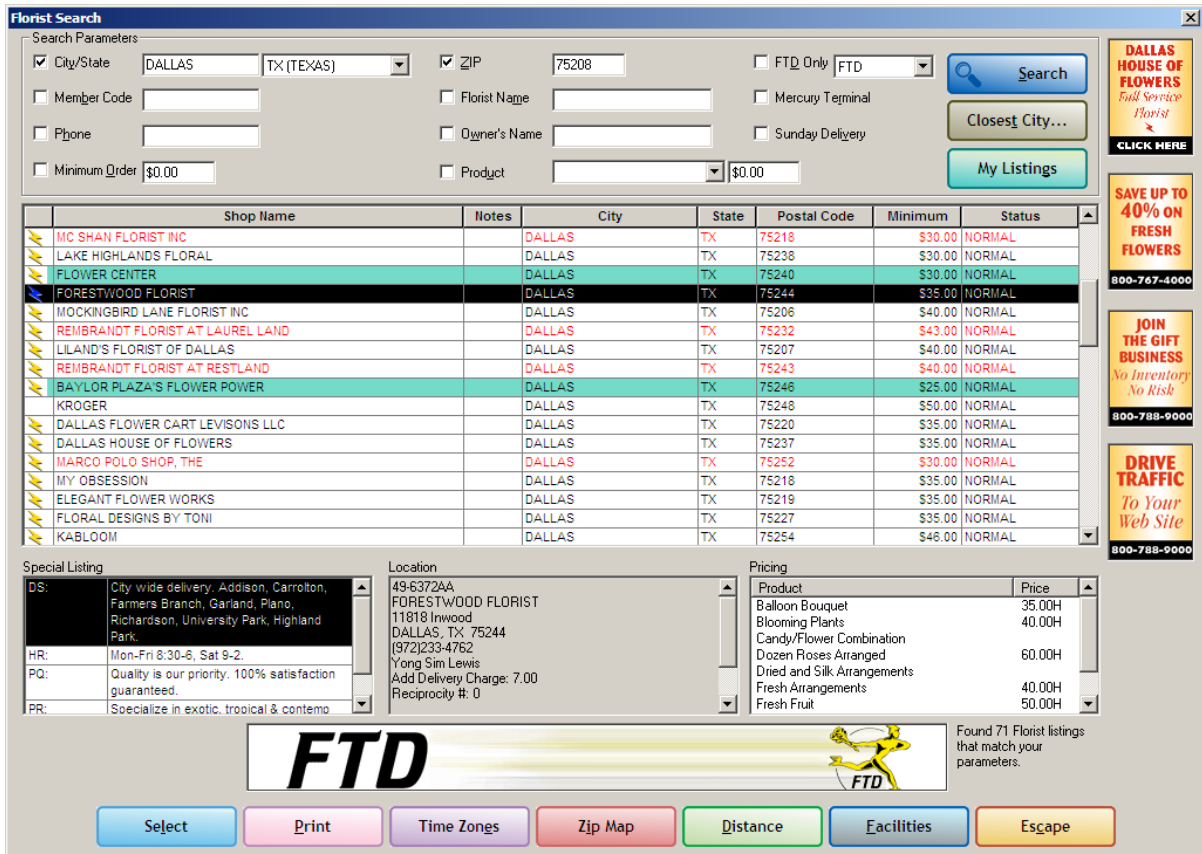
Following are a few helpful tips to keep in mind when you are performing a Florist Search:

- » The status of the store may be changed directly from the Florist Search window. See [Florist Status](#) on page 5-10 for details.
- » If you type an abbreviation for a city in Florist Search, the system corrects it for you automatically:
 - » Mt, Mt., Mnt, or Mnt. is corrected to Mount.
 - » Ft, Ft., Frt, or Frt. is corrected to Fort.
- » In the Store Name column, if the name of the store is preceded by ALSO SERVES, the florist also serves the recipient's city.
- » You can display a time zone map by clicking the Time Zones button in the Florist Search window.
- » You can display a ZIP code map of your chosen city by clicking the Zip Map button in the Florist Search window (if available).
- » When the shop has purchased an ad in the Sunday supplement, the grid color in the results list will be light green.
- » When the shop has paid for Red ink in the paper version of the Florist Directory, the letters in the results list will be red.
- » If a florist has a Mercury terminal, the Mercury terminal indicator will display an icon in the Mercury column of the results.

- » If there are notes about the florist you have entered, FTD Mercury displays a note icon in the notes column for the florist. You can double-click on the icon to view or edit the notes. If you want to add notes about a florist, you can double-click in the notes column and the Notes window opens for you to enter and save your new florist notes.

Florist Search Window The Florist Search window allows you to enter criteria for a florist and search the electronic florist directory for florists who match your parameters.

Figure 5-1: Florist Search Window



Search Parameters Area

When you perform a Florist Search using multiple search parameters, the florist must match all parameters to be included in the results list.

You must select at least one of these parameters to perform a Florist Search:

Table 5-1: Primary Search Parameters

Parameter	Description
City/State	Enter the city and state or province for the florist. Your city name must be at least three characters in length. If you enter only part of the city name, you could have multiple cities that match and will be displayed in the results list; for optimal accuracy, enter the entire city name. If you select a state, you must enter a city. If you access Florist Search from the FTD Mercury Main Menu, you do not have to select a state; Florist Search will search for the city regardless of the state. If you enter Florist Search from Order Entry or Point of Sale, the state is automatically filled in based on the recipient address.

Table 5-1: Primary Search Parameters (cont.)

Parameter	Description
Zip	Enter the ZIP/postal code for the florist. If the value you enter matches the beginning of a ZIP/postal code for a florist, the shop will be included in the results list.
Member Code	Enter the florist's member code. If the value you enter matches the beginning of a florist's member code, the shop will be included in the results list.
Florist Name	Enter the name of the florist's shop. You must enter a minimum of three characters as the value. If the value you enter matches the beginning of a florist name in the directory, the florist will be included in the results list.
Phone	Enter the phone number for the florist. You must enter at least three digits of the phone number as the value. If the value you enter matches the beginning of a florist's phone number, the shop will be included in the results list.
Owner's Name	Enter the owner's name for the florist shop. You must enter at least three characters as the value. If a florist shop's owner contains the value you enter, the shop will be included in the results list.

The following search parameters are available only if you select a primary search parameter as well:

Table 5-2: Secondary Search Parameters

Parameter	Description
Minimum Order	If you want to ensure a filling florist will accept a certain order value, select this parameter and enter the value for the order. Florists who will accept an order with of that value (or less) will be included in the results list. For example, if you enter \$20.00 as the Minimum Order value, florists who will accept \$20 or less as their minimum value will be included in the results list. However, florists who will only accept a value of \$20.01 or more will not be included.
Product/Price	If you want to ensure a filling florist sells a product, select the Product parameter and select the appropriate product from the list. If you want to further refine the search, you can enter a minimum product price. All florists who sell the product for the amount you enter or less will be included in the results. If you do not enter a minimum product price, the results list will contain florists who sell that product regardless of the price.
FTD Only	If you select this parameter, the Florist Search will only return florists who are marked as FTD Only in the florist directory.
Mercury Terminal	If you select this parameter, the Florist Search will only return florists who have Mercury terminals.
Sunday Delivery	If you select this parameter, the Florist Search will only return florists who are marked as having Sunday delivery in the florist directory.

After you click Search, results are displayed in the results list below the Search Parameters area. All results are included in the scrollable list.

Results List

Search results are displayed in a list below the Search Parameters area. The number of florists who matched your search criteria is listed directly to the right of the banner ad. Each florist who matches the search criteria is listed on an individual line, which includes the following columns:

Table 5-3: Results List Columns

Column	Description
Mercury Terminal	If the florist has a Mercury terminal, an icon will appear in this column.
Shop Name	The name of the florist shop. If a shop serves the city, but is not located in the city, the shop name is preceded by Also Served By.
Notes	If florist notes exist, a notes icon will appear in this column. You can click the icon to display or edit the notes in the Note Entry window. If no notes exist and you click in the Notes column, the Note Entry window will open, allowing you to enter notes about the florist.
City	The florist's city.
State	The florist's state or province.
Postal	The florist's ZIP or postal code.
Minimum	The minimum order amount the florist will accept (if listed).
Status	The florist's status, as determined by your shop. By clicking on the column, you can set this value to First Choice, Preferred, Normal, or Not Preferred. By default, all florists have a status of Normal.

TIP If you click on a column header in the results list, the list will sort by that column.

If a florist has purchased an advertisement in the Sunday supplement, that florist's row will be light green in the results list. If the florist has red ink in the printed florist directory, the letters in the florist's row will be red.

Table 5-4: Florist Search Window Legend

Format	Description
Green Highlight	The florist has purchased an advertisement in the Sunday supplement.
Red Letters	The florist has purchased red ink in the printed florist directory.

TIP If you want to purchase an advertisement or red ink, contact the National Marketing Consultant for your area by calling 800-788-9000.

When you highlight a florist in the results list (either by clicking on the row or using the arrow keys to highlight the row), additional information is displayed in the Special Listings area, the Location area, and the Pricing area.

FTD Domestic Retrans Service as Result

If there are no florist shops that service a town you searched for, the FTD Domestic Retrans Service will display in the results list. This will only happen if you are entering an order in Order Entry or

Point of Sale—not if you are searching for a Florist using Florist Search from the FTD Mercury Main Menu.

FTD Mercury will never automatically select the FTD Domestic Retrans Service as the filling florist. You must manually select it if you want FTD's Domestic Retrans department to place an order with a non-member florist that might service the town

Special Listings Area

The Special Listings area contains additional information about the selected florist. Some or all of the following codes can appear in this area:

- » **HR:** Hours of business
- » **CL:** Days closed
- » **SU:** Sunday delivery available
- » **TF:** Toll-free telephone number
- » **FX:** Fax number
- » **DS:** Delivery service information
- » **PR:** Products available
- » **PQ:** Professional qualifications

TIP If you want to purchase special listings, contact the National Marketing Consultant for your area by calling 800-788-9000.

Location Area

The Location area contains information about the selected florist, including the florist's member code, address, and telephone number. You can also determine from this area whether this florist is FTD only, and what the reciprocity totals are.

Pricing Area

The Pricing area contains information about minimum pricing for codified products that the florist provides. This is obviously not an all-inclusive listing. However, it can give you a good idea for common items (for example, the price for a dozen roses).

Banner Ads

Banner ads are displayed based on your search results. If you click on a banner ad (displayed at the bottom of the window), the florist associated with that ad will be highlighted in the results list.

Paid Placement Ads

Paid placement ads are displayed on the right side of the window, and are based on search results. If you click on a paid placement ad, the florist associated with that ad will be highlighted in the results list.

Buttons

At the top of the Florist Search window, there are three buttons:

Table 5-5: Florist Search Buttons

Button	Description
Search	After selecting at least one search criteria, click Search to display matching florists in the results list.
Closest City	Click this button to display cities close to the city you entered as a search parameter.
My Listings	Click this button to display your listings in the florist directory.

At the bottom of the Florist Search window, there are several buttons in the button ribbon that provide access to additional features and functions

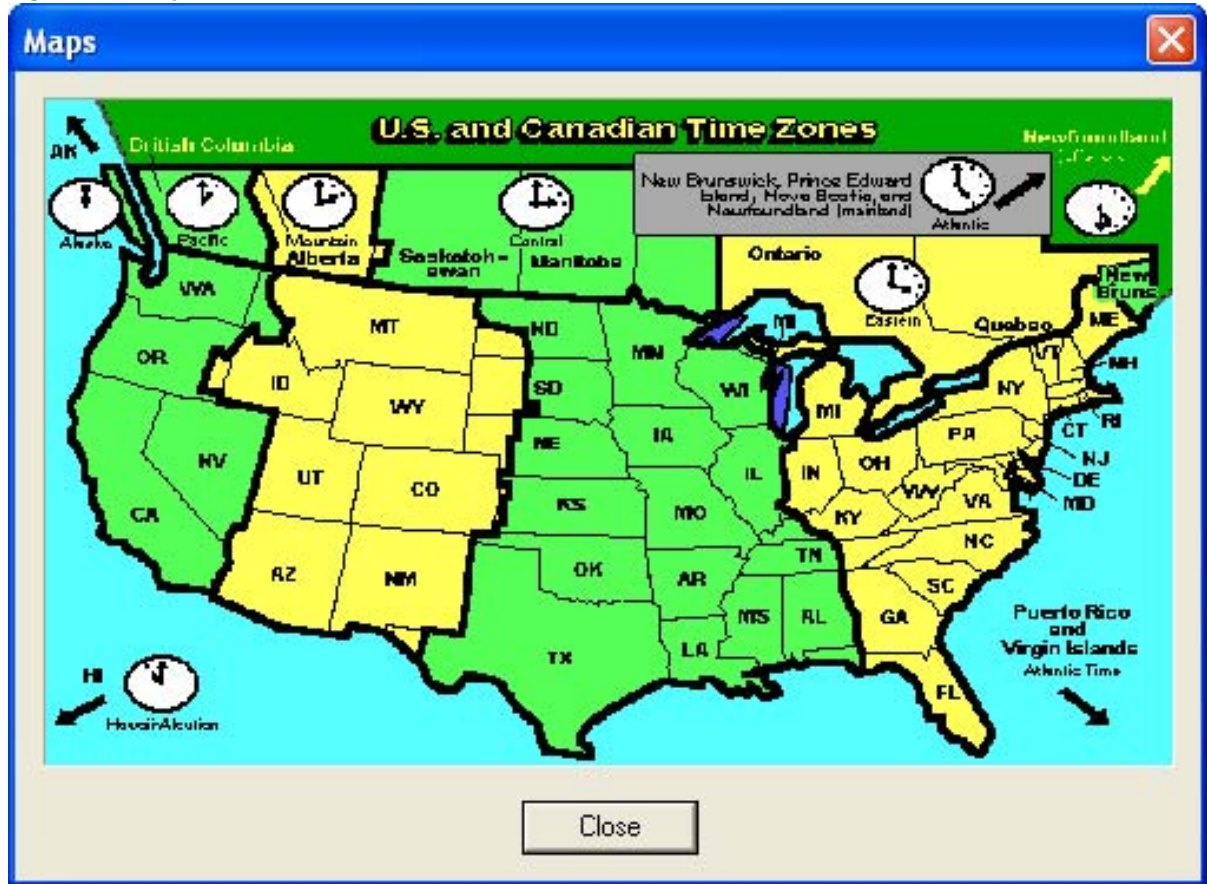
Table 5-6: Florist Search Button Ribbon Buttons

Button	Description
Select	If you opened Florist Search from Order Entry or Point of Sale, you can click this button to select the currently highlighted florist from the results list.
Print	Click this button to print detailed information about the florist currently selected in the results list.
Time Zones	Click this button to display a time zone map.
Zip Map	Click this button to display a ZIP code map for the city (if available).
Distance Map	Click this button to display a distance map that shows where the available florists are vs. the recipient. This can help you select the best florist for the order.
Facilities	When you click this button, a Facility Search will be performed for the florist currently selected in the results list. The list of facilities associated with the selected florist are displayed in the Facilities for a Florist window.
Escape	Click this button to close the Florist Search window.

Maps (Time Zones) Window

The Maps window displays the time zones within the United States and Canada. The clocks at the top of the window show the relative time changes between zones. You can open this window by clicking Time Zones in the Florist Search window.

Figure 5-2: Maps Window



Florist Status

You can provide a status for each florist in the florist directory. Status is your “ranking” of a florist in relation to other florists in the city. By default, all florists have a status of Normal. The available status levels for each florist are (in descending order):

- » **First Choice**
- » **Preferred**
- » **Normal**
- » **Not Preferred**

As a sending shop, it is up to you how you rank florists (the florists in your directory do not know how you have ranked them). However, it is beneficial to rank florists so you make sure your employees know which filling florists deliver the best quality and represent your shop. Additionally, if you use Auto Select to select a filling florist, the florist status comes into play (along with location, product availability, and reciprocity). Also, if you use automatic order processing, the florist chosen for outgoing messages relies on your ranking.

You can change a florist’s status from the Florist Search window.

TASK To change a florist’s status:

- 1 On the FTD Mercury Main Menu, in the Search area, click **Florist**. The **Florist Search** window opens.
- 2 Enter your search criteria and click **Search**.

- 3 In the results list, click in the **Status** column for the florist to display an arrow. Click the arrow and select a status from the list.

The change in florist status is effective immediately.

Looking Up Your Directory Listings

You may, at some point, want to look up your own Florist Directory listing. When you do, you can see your current Rank (1, 2, 3, etc.) in the Florist Directory. This is the order in which your store displays when other florists perform a “city, state” search. For example, if your rank is 3 and you are located in Westmont, IL, when a florist types Westmont, IL in Florist Search, your shop is the third shop listed. Ranks are rotated with each florist directory.

You can also see the Type of listing you have, and detailed information about your listing.

TASK To view your listing(s) in the online Florist Directory, including the rank of each listing:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Florist**. The **Florist Search** window opens.
- 2 Click **My Listings**. The **My Listings** window opens, displaying all of your listings along with their current ranks in the Florist Directory.
- 3 Double-click on a listing to display to display that listing in the **Florist Search** window.

My Listings Window

This window gives you easy access to all of your listings in the florist directory. Your listings display along with their current ranks in the directory. The Rank (1, 2, 3, etc.) is the order in which your store displays in a “city, state” search in Florist Search. For example, if your rank is 3 and you are located in Westmont, IL, when you type Westmont, IL in Florist Search and click Search, you are the third shop listed. Ranks are rotated with each florist directory.

The Type of listing is categorized as Regular (**R**), Extra (**E**), or Also Serve (**S**).

To view details about that listing, double-click on it to open it in the Florist Search window.

Closest City Search

A Closest City Search is used to find cities nearby any city in the United States. This feature is useful when you want to search for a filling florist near (but not in) the city where the recipient is located. For example, if Long Grove, IL does not have a Mercury florist (or a florist with an appropriate status), you can use the Closest City Search feature to locate nearby cities: Buffalo Grove, IL and Vernon Hills, IL. You may then decide to locate a filling florist in one of these cities.

Searching for the Closest City

TASK To find the closest city:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Florist**. The **Florist Search** window opens.
- 2 In the **City** field, enter the name of the city for which you want to find a close city. From the **State** list, select the state. If you are searching for a Canadian store, select the province from the State list. If you are searching for a florist in Puerto Rico, select **PR (PUERTO RICO)** from the **State** list.
- 3 Click **Closest City**. The **Closest City Search** window opens.

- 4 The city and state (or province) you entered in the **Florist Search** is already entered. Click **Search**.
- 5 The ten closest cities appear in the results list. An asterisk next to the town name indicates that there is a Mercury florist in that town. From the results list, select the city you want to use in your **Florist Search** and click **Select**.

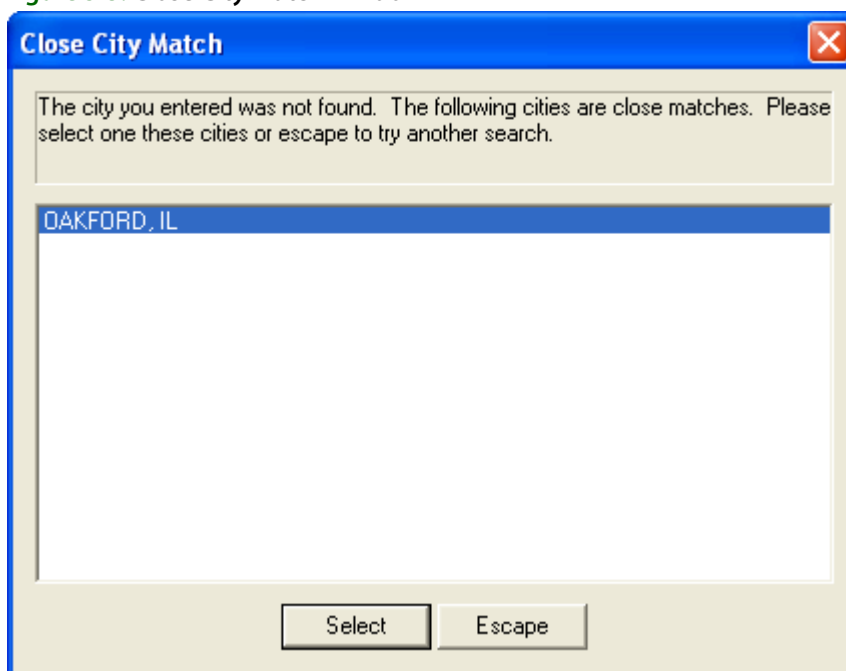
When you return to the Florist Search window, a search has already been performed on the city you selected.

NOTE If there are other cities with the same name, the Closest City County Selection window appears. Select the county of your search city from the list and click Select. The Closest City Search window reappears and displays the cities closest to your search city.

Close City Match Window

The Close City Match window is used to determine which city you are searching for in a Florist Search. This window is particularly useful if you have forgotten the spelling of a particular city, but can remember part of it. Your FTD Mercury system can help you determine which city you are looking for by listing several cities that have similar spellings to the one you have entered.

Figure 5-3: Close City Match Window



Highlight the correct city in the list and click Select. Or, if none of the names match your desired city, click Escape and try another search in the Florist Search window.

Closest City County Selection Window

From the Closest City County Selection window, select the correct county from the list. This window appears because there is more than one city with the same name and the program needs to verify the correct city.

- 1 With your mouse, select the name of the county in which the city is located.
- 2 Click **Select**. The **Closest City Search** window will reappear and display the ten cities closest to your search city.

Closest City Search Window

The Closest City Search window is used to find cities nearby your Florist Search city. You may need to find a filling florist in another city in the case that there is not a Mercury florist in your search city. The Closest City Search feature is available for cities in the U.S. only.

Figure 5-4: Closest City Search Window

Enter city and state

LONG GROVE, IL

Search

FTD Non-Member City

County: Lake

Notes about this city:

FTD Member City	State	County	Distance
BUFFALO GROVE*	IL	Cook	2.7 SE
VERNON HILLS*	IL	Lake	3.0 NE
WHEELING*	IL	Cook	4.4 SE
PALATINE*	IL	Cook	5.1 SW
LAKE ZURICH*	IL	Lake	5.1 W
MUNDELEIN*	IL	Lake	5.9 N
LAKE FOREST*	IL	Lake	6.1 E
ARLINGTON HEIGHTS*	IL	Cook	6.3 S
PROSPECT HEIGHTS*	IL	Cook	6.5 SE
ROLLING MEADOWS*	IL	Cook	6.6 S

Select

Escape

Facility Search

You perform a Facility Search when a customer is sending flowers to a recipient in a hospital or nursing home, or if you are sending flowers to a funeral home. You use the Facility Search to locate the recipient information (such as address and phone number) for that facility.

You can begin a Facility Search directly from the Order Entry, Point of Sale, or Add Recipient window. You can also begin a Facility Search by clicking Facility Search on the Search menu.

TASK To perform a Facility Search from the Order Entry, Point of Sale, or Add Recipient window:

- 1 Click the **Facility** button.
- 2 Type your search criteria in the text box. You can search by ZIP code, city/state (for example, Chicago, IL), facility ID number, or part or the entire facility name.
- 3 The search automatically includes all hospitals, nursing homes, and funeral homes that meet your search criteria. If you want to exclude any of these facility types from your search, clear the boxes containing unwanted facility types.
- 4 Click **Search**. The results list displays facilities display in alphabetical order.
- 5 If you want to view details about the facility, double-click a facility from the results list. The **Facility Detail** window opens.

- 6 If you want to search for additional florists in the area, click **Search Surrounding Area**.

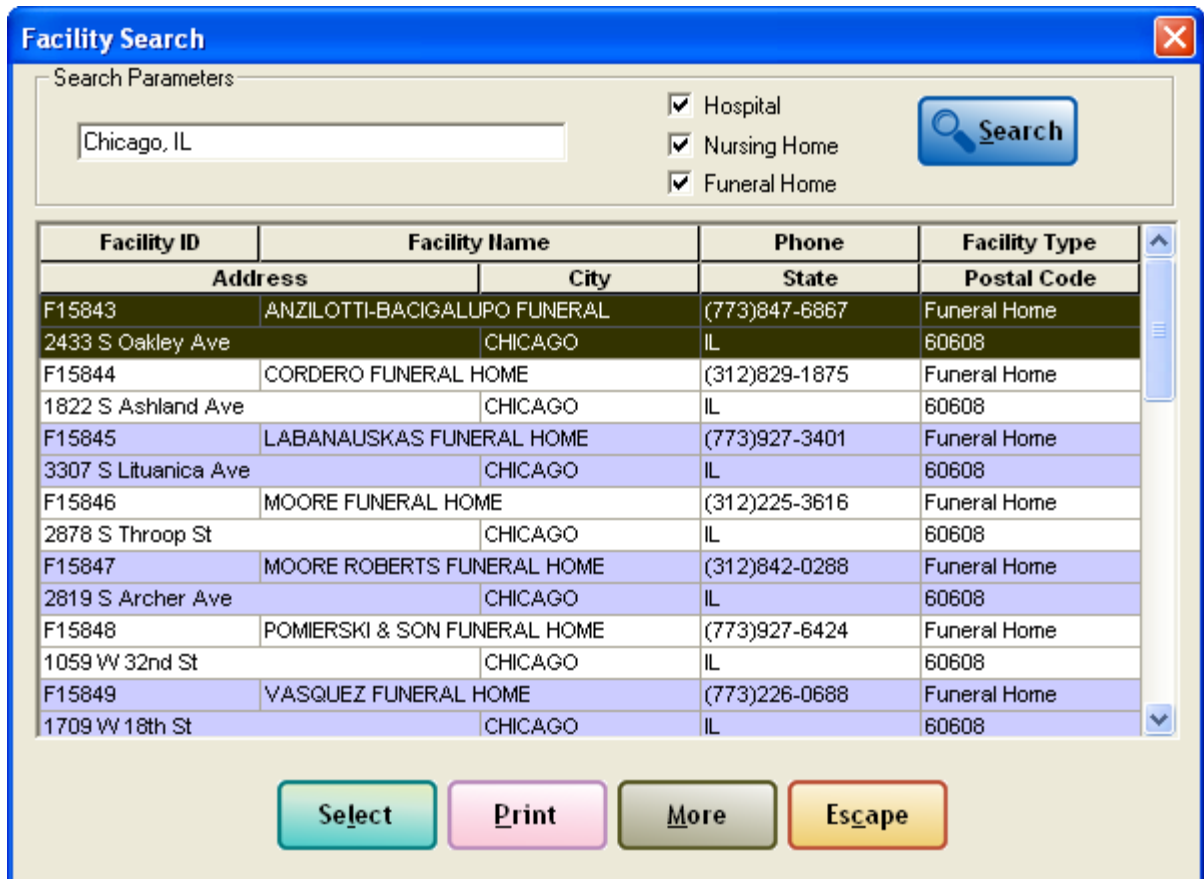
Facility Search Window

The Facility Search window is used to locate facility (hospital, nursing home, etc.) information. This window is most commonly used when completing the recipient information in the Order Entry or Point of Sale windows, and the recipient is located at a facility. You can also open this window from the Add Recipients window (in Funeral Log).

If you accessed this window from the Order Entry, Point of Sale, or the Add Recipient window, highlight the facility where the recipient resides and click Select.

When you locate a facility through a Facility Search, you may also display facility detail information. Double-click a facility in the list or highlight it in the list and press the **SPACEBAR** to display the Facility Detail window. In this window you may view florists that deliver to that facility.

Figure 5-5: Facility Search Window



Facility Detail Window

When you double-click on a facility in a Facility Search results list or in the Facilities for a Florist window, the Facility Detail window opens. This window displays the following information:

- » Facility location, phone number, ID, and facility type.
- » Florists delivering to that facility. You can double-click on a florist in the list to display detailed information.

NOTE Florists listed here are not necessarily the only florists that deliver to the facility.

If you want to search for additional florists in the area, click Search Surrounding Area.

NOTE If you need updates to the list of facilities your shop is associated with, send a GENERAL message to FTD Directory Services (90-2058AA).

Facilities for a Florist Window

The Facilities for a Florist window opens when you select a florist from the results list in Florist Search and click Facilities. This window displays a listing of facilities that this florist serves. If you double-click on a facility, information about the facility opens in the Facility Detail window.

Distance Map Window

When you click the Distance button, the Distance Map window opens. This button is only available if you open Florist Search from Order Entry or Point of Sale for wire out orders. This window plots the available florists for the order in relation to the recipient address, providing you the distance between the recipient and potential filling florists. This can assist you in choosing the right florist for the order.

Figure 5-6: Distance Map Window

Recipient Address: 123 W MAIN ST, DALLAS, TX 75208

	Miles	Min	Shop Name	City	State	Zip Code	Phone	Status
1	1.0	\$40.00	LILAND'S FLORIST OF DALLAS	DALLAS	TX	75207	(214)823-9505	Normal
2	1.4	\$37.00	GERALDINE HALE FLORIST	DALLAS	TX	75202	(214)748-1226	Normal
3	1.8	\$35.00	AM FLOWERS	DALLAS	TX	75201	(214)777-6584	Normal
4	1.8	\$45.00	ANTHONY CHISOM INTERIORS	DALLAS	TX	75201	(214)542-1626	Normal
5	2.1	\$35.00	FLOWERS BY JOCELYN	DALLAS	TX	75208	(214)941-8880	Normal
6	2.2	\$35.00	ROSE GARDEN	DALLAS	TX	75208	(214)943-8100	Normal
7	2.6	\$30.00	ALL OCCASIONS FLORIST	DALLAS	TX	75219	(214)528-0898	Normal
8	2.6	\$50.00	KROGER	DALLAS	TX	75219	(713)507-6255	Normal
9	2.6	\$35.00	THE PETAL PUSHER	DALLAS	TX	75246	(214)827-7496	Normal
10	3.0	\$35.00	ELEGANT FLOWER WORKS	DALLAS	TX	75219	(214)522-3790	Normal

Buttons: Add To Map, Select, Escape

By default, the map displays the first 10 florists; if you want to display florists beyond the first 10, select the florist from the list and click Add to Map.

IMPORTANT You must have Microsoft MapPoint installed on a computer to view the Distance Map.

Managing Employees

Topics in this section focus on employee management and maintenance in FTD Mercury, including tracking their personal information as well as sales and employment information. Almost all configurations for employees are performed through Mercury Administration (see [Employee Folder](#) on page 24–51 for details).

Adding Employees

You should add employees to FTD Mercury and not use the default logins so you can track employee productivity and restrict access to areas of FTD Mercury. Once you have added an employee, you can set the employee's password, allowing each employee to log in separately to the system.

TASK

To add an employee in Mercury Administration:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Right-click on the screen (not on an existing employee), point to **New**, and select **Employee**.
- 3 When a message appears asking if you want to add a new employee, click **Yes**. An icon labeled **New Employee** appears.
- 4 Double-click the **New Employee** icon. The screen displays information about the new employee.
- 5 Fill in information about the employee.
- 6 Click **Apply** to save your changes before leaving this screen.

Figure 6-1: Adding Employees

Name: Paul Skobel Employee ID: Paul

Address Information
Home 440 Main Street
DOWNERS GROVE, IL 60515
 Primary Address

Phone Information
Home 630-555-7677
 Primary Phone

Allow this Employee Online
Login Name: Paul
Language: English

Password: *****
Confirm: *****

Active Status
Social Security No: 555-55-5555
Employee Type: Full Time
Job Category: Designer

Notes
Available to work: M-F 9am to 5:30pm

Apply Terminate... Undo

Editing Existing Employee Information

TASK To access details about an employee:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Double-click on an employee. Employee details appear for that employee.
- 3 Change information about the employee as necessary.
- 4 Click **Apply** to save your changes before leaving this screen.

Requiring Employee Names in Order Entry and Point of Sale

FTD Mercury provides a setting that allows you to require that employees select their employee name when entering an order in either Order Entry or Point of Sale.

TASK To require employees to select their name in Order Entry and Point of Sale:

- 1 On the **Tools** menu, click **Settings**.
- 2 On the **FTD Mercury Configuration** window, in the **Order Entry/POS** area, select **Prompt for Employee Name**.
- 3 Click **Save**.

After you have done this, the Employee list in Order Entry and Point of Sale is by default blank when filling out a new order. Employees must select their employee name from the list before they can complete orders.

Changing Employee Passwords

You can change employee passwords in both FTD Mercury and within Mercury Administration.

Changing Employee Passwords in FTD Mercury

TASK To change an employee's password within FTD Mercury:

- 1 On the **Tools** menu, click **Change Password**.
- 2 In the **Login** field, enter the login name of the employee that you want to change.
- 3 In the **Old Password** field, type the old password for this employee. Asterisks (****) appear to protect the password.
- 4 In the **New Password** field, type a new password.
- 5 In the **Confirm Password** field, type the new password again to confirm.
- 6 Click **Save**.

Changing Employee Passwords in Mercury Administration

TASK To change an employee's password in Mercury Administration:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Double-click the employee to display employee details.
- 3 In the **Password** field, delete the existing password (displayed in asterisks) and then enter the new password.
- 4 Enter the new password again in the **Confirm** field.
- 5 Click **Apply**.

FTD Server Password Window

The FTD Server Password window is used to change an employee's password in your FTD Mercury system.

Figure 6-2: FTD Server Password Window

The screenshot shows a dialog box titled "FTD Server Password". It has a standard Windows-style title bar with a close button (X) in the top right corner. The main area contains four text input fields stacked vertically. The first field is labeled "Login:" and contains the text "Kristie". The second field is labeled "Old Password:" and contains a series of asterisks. The third field is labeled "New Password:" and also contains a series of asterisks. The fourth field is labeled "Confirm Password:" and contains a series of asterisks. Below these fields are two buttons: "Save" and "Escape".

The existing password must be entered first, and then the new password must be entered twice to change the employee password.

Terminating an Employee in Your System

TASK To terminate an employee in your system:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Double-click the name of the employee you want to terminate.

- 3 Click **Terminate**.
- 4 When the **Terminate Employee** window opens, enter the date of termination for the employee and click **Terminate**.
- 5 When prompted for whether you want to terminate the employee, click **Yes**.

Once you exit Mercury Administration and re-launch it, the terminate employee's name appears in the Employees screen with a red X through it.

Activating Terminated Employees

TASK To activate an employee that has been terminated:

- 1 Access the **Employees** screen in **Mercury Administration**.
- 2 Double-click on the terminated employee's name. Employee details (grayed out) appear with this employee's information.
- 3 Click **Activate**.
- 4 When the **Terminate Employee** window opens, click **Activate**.
- 5 When you are prompted whether you want to activate this employee, click **Yes**. The **Employee** details become active so you may change information as needed.
- 6 Click **Apply** to save your changes before exiting this screen.

Once you exit Mercury Administration and re-launch it, the red X that was on the employee's name disappears.

Handling Employee Payroll

FTD has teamed up with Intuit Payroll Services to provide you with several Payroll options by using Payroll through QuickBooks. QuickBooks Payroll is an easy, hassle-free way to run Payroll and pay your Payroll taxes. QuickBooks offers many payroll services such as tax table updates, tax deposit and filing, W-2 preparation, and even check delivery. If you sign up for Payroll through QuickBooks, you are billed directly through Intuit.

For more information on QuickBooks Payroll options, go to www.payroll.com or call Intuit at 866-238-3345 to get a free quote. If you mention that you are an FTD member florist and that FTD is part of Intuit Payroll Services' affiliate program, you will receive a 15% discount on select products and services.

Tracking Employee Time

FTD has partnered with Count Me In to provide you with an easy, efficient way to keep track of your employees' time. Every time an employee checks in or out, they tap a finger on a scanner that is attached to your PC. After the PC recognizes the employee's fingerprint, the precise entry or exit time is recorded. This information is then compared to the employee schedule that you set up, and you are notified if there are any discrepancies with the schedule (late arrivals, long breaks, etc.) the next morning.

At the end of the pay period, you can then use Count Me In's QuickBooks importing tool to import the timeclock information into QuickBooks, where you can run your Payroll (see [Handling Employee Payroll](#) on page 6-4) and print checks.

TIP Count Me In is easy to install and simple to operate. No special training is required. For more information on Timeclock, call Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com.

Employee Reports

If your FTD Mercury system includes Accounts Receivable, Order Entry, or Point of Sale, it also includes several employee reports. Learn more about available reports in [Business Reports](#) on page 19-1.

Employee Types

Employee types are used when entering new employees into FTD Mercury. By default, there are two employee types in your system: Full Time and Part Time. You may want to add additional employee types (for example, seasonal, student, contract, etc.) for your needs. Employee types are not used in reporting or in searches.

Adding Employee Types

TASK To add an employee type:

- 1 Access the **Employee Type** screen in **Mercury Administration**.
- 2 In the upper text box, enter the new employee type and click **Add**.
- 3 Click **Apply** to save the changes before exiting this screen.

Removing Employee Types

TASK To remove an employee type:

- 1 Access the **Employee Type** screen in **Mercury Administration**.
- 2 Select the employee type you want to remove from the lower text box and click **Remove**.

NOTE An employee type cannot be removed if any employee is labeled with that type.

- 3 Click **Apply** to save the changes before exiting this screen.

Job Functions

Job functions are used to determine the level of access your employees have in the system. For example, you may want your "Manager" employee job function to access all levels of the program, but you want your "Clerk" to access only the Order Entry and search functions. Procedures in this section teach you how to add or remove job functions. (To learn how to change employee access level, refer to [Window Access Screen](#) on page 24-57 after adding any job functions.)

NOTE A job function cannot be removed if any employee is labeled with that type.

Adding Job Functions

TASK To add a job function:

- 1 Access the **Job Functions** screen in **Mercury Administration**.
- 2 Right-click in the **Job Functions** screen (but not on an existing job function), point to **New**, and select **Job Function**.
- 3 In the **Job Functions** window, in the upper field, enter the new job function name and click **Add**.
- 4 Click **Apply** to save your changes before exiting this window.

Removing Existing Job Functions

TASK To remove an existing job function:

- 1 Access the **Job Functions** screen in **Mercury Administration**.
- 2 Right-click in the **Job Functions** screen (but not on an existing job function), point to **New**, and select **Job Function**.
- 3 In the **Job Functions** window, from the list of existing job functions, select the job function you want to remove and click **Remove**.
- 4 Click **Apply** to save your changes.

Security

There are three types of security you can set for employees in FTD Mercury:

- » **Employee-Level Security**—Employee-level security can be set for Point of Sale functions only. These settings can be set in addition to what you have set for the employee's job function. Note that employees have equal rights in all stores. When you set up an employee in Mercury Administration, that employee's security settings apply at all locations.

NOTE Job function-level security overrides employee-level security.

- » **Job Function-Level Security**—Job function-level security is security that you set that is the same for all employees in a particular job function. For example, you may want to restrict all clerks from performing a No Sale transaction in Point of Sale, or you may want all Managers to be able to terminate an employee. When you create these settings for a job function, you create them for all employees in the job function. These settings override settings that you set for specific employees.
- » **Window Access**—Initially, your system is set to grant full access to all windows for all employees. However, you may wish to limit the level of access per job function. For example, you may prefer that your clerks not have access to employees' personal information. The following procedure teaches you how to limit access to the program for some employees. The message "You are not authorized to use this function" displays if the employee tries to access a restricted area.

TIP Window access displays the same list of program areas as individual job function security levels. However, because you can see all job functions at the same time in the Window Access screen, you may find it easier to compare access between different job functions.

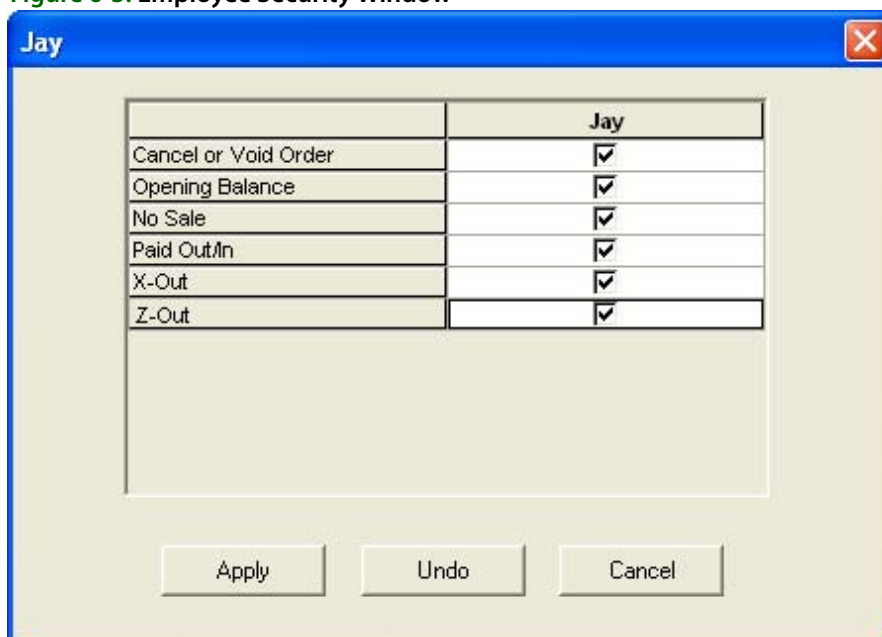
Setting Employee-Level Security

TASK To access employee-level security for a specific employee:

- 1 Expand the **Employees** menu in **Mercury Administration**.
- 2 Right-click on the name of the employee, then click **Security**. A window with the employee's name opens.
- 3 Each Point of Sale function is listed with a check mark next to it. For the functions you want the employee to be able to perform, ensure the check box is selected.
- 4 Click **Apply** to save the changes.

Employee Security Window

Figure 6-3: Employee Security Window



Single employee security can be set for Point of Sale functions only. These settings can be set in addition to what you have set for the employee's job function.

NOTE Job-function level security overrides single employee security.

In this window you can indicate which transaction types this employee can perform in Point of Sale. For every transaction type that you will like the employee to perform, click in the box so that a check mark appears. For all of the transactions that are left unchecked, the employee will not be able to perform. Click Apply when you are finished making changes.

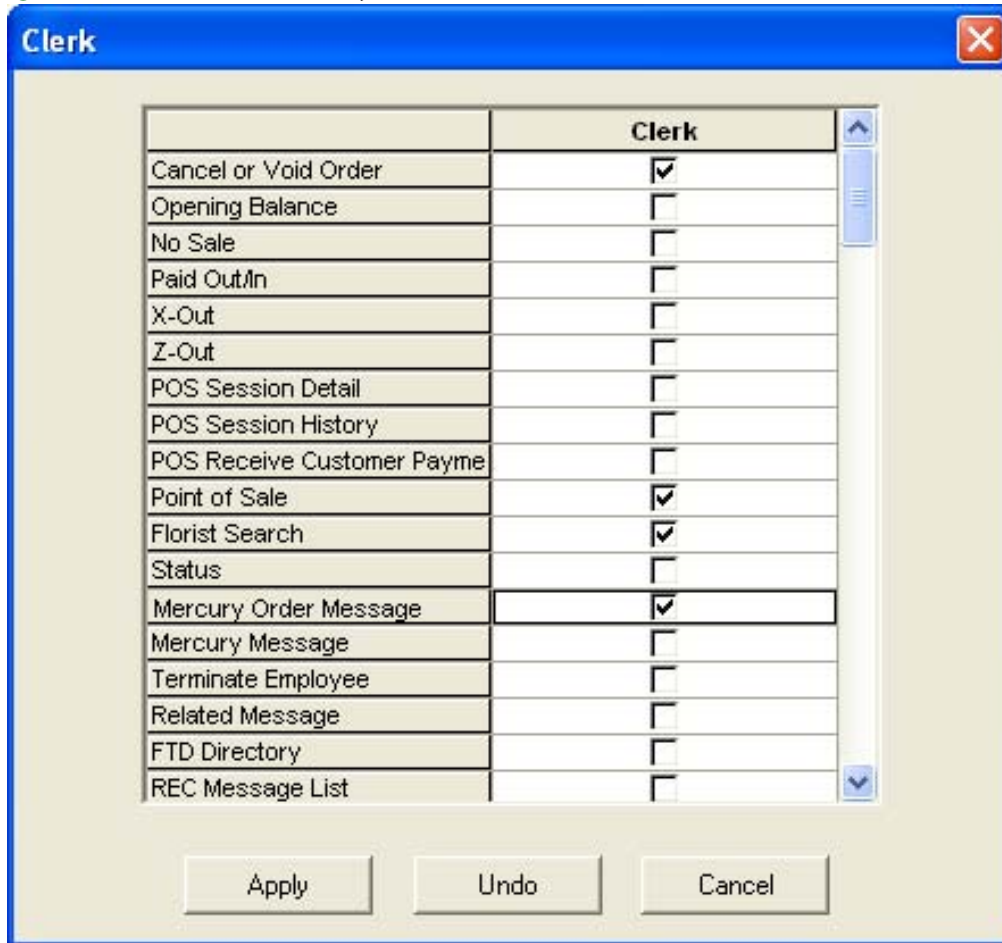
Setting Job Function–Level Security

TASK To set job-level security for a job function:

- 1 Access the **Job Functions** screen in Mercury Administration.
- 2 Right-click on the job function you want to set security for and click **Security**.
- 3 Select check boxes for areas of the program to which you want that job function to have access.
- 4 Click **Apply** to save changes before exiting this window.

Job Function Security Window

Figure 6-4: Job Function Security Window



Job function-level security is security that you set that is the same for all employees in a particular job function. For example, you may want to restrict all clerks from performing a No Sale transaction in Point of Sale, or you may want all Managers to be able to terminate an employee. When you create these settings for a job function, you create them for all employees in the job function. These settings override settings that you set for specific employees.

For every area of the program that you will like the employees to access, select the corresponding check box. For all of the areas that are left unchecked, the employees will not be able to access. Make sure that you scroll down to see all the options.

Once you have finished making changes, click Apply to save them, click Undo to revert to the settings that were there when you opened the window, or click Cancel to close the window without saving changes.

Setting Window Access for Employees

TASK To set window access levels for employees:

- 1 Access the **Window Access** screen in **Mercury Administration**.
- 2 Initially, all employees may access every area of the program. To change the access level, click the field in the appropriate column to reveal an arrow. Click the arrow button and select either **Full access** or **No access** for each job function and window
- 3 Click **Apply** to save the changes before exiting this screen.

Searching for Employees

If you want to view employee information (such as address, phone number, and login name), you must first locate the employee's data through an Employee Search.

TASK To perform an employee search:

- 1 On the **Search** menu, click **Employee Search**. The **Employee Search** window opens.
- 2 In the **Search Parameters** area, in the text box, type the name, part of the name, or telephone number of the employee for whom you are searching.
- 3 Click **Search**.
- 4 In the results list, double-click on an employee to view the employee's information. Use Mercury Administration to make changes to employee information. See [Editing Existing Employee Information](#) on page 6-2 for more information.

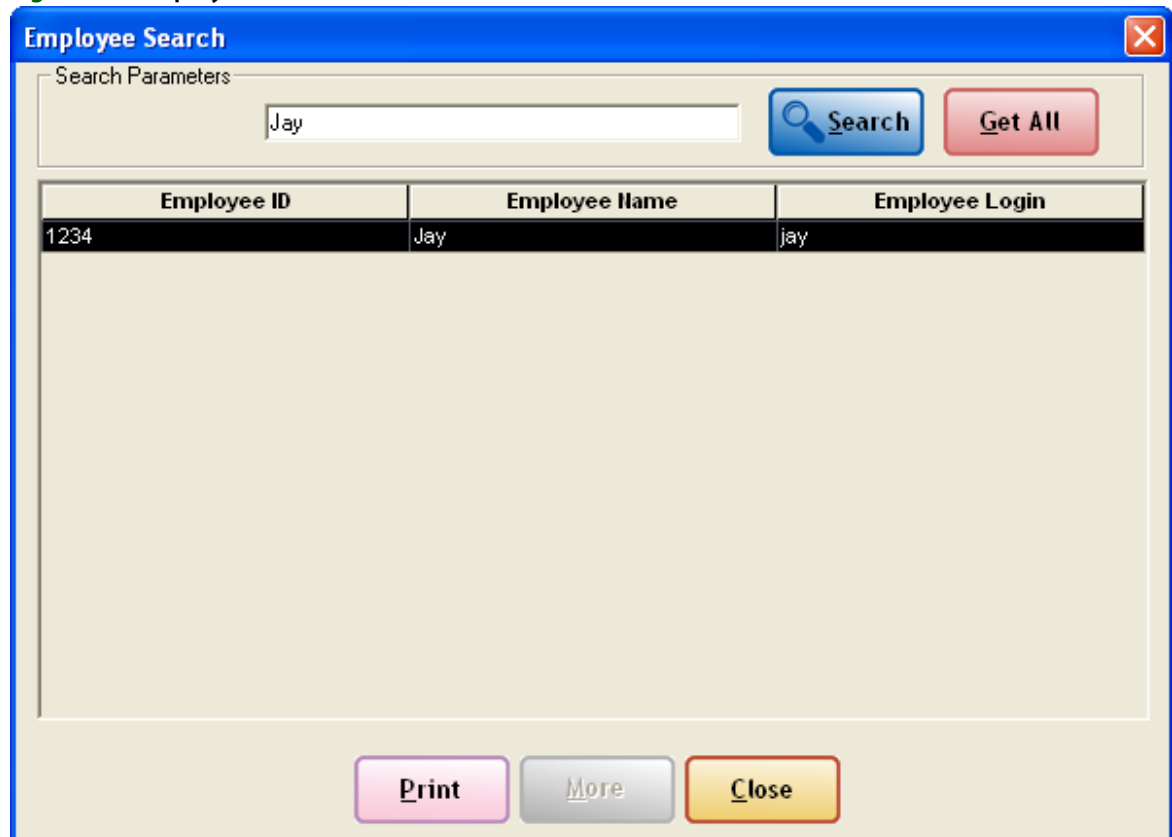
TIP If you want to retrieve information for all your employees, click **Get All** in the Employee Search window. Then, double-click on the individual employee records to display information for each employee.

Employee Search Window

The Employee Search window opens when you select Employee Search from the Search menu in FTD Mercury. In the Search Parameters area, you can enter the name (full or partial) for the employee and then click Search. You can also click Get All to get all employees in FTD Mercury. Matching employees appear in the results list, which includes the employee ID, name, and login.

Click Print to print the results list. Click More to display additional employees in the results list (if the search returned more results than could fit on the window). Click Close to close the window.

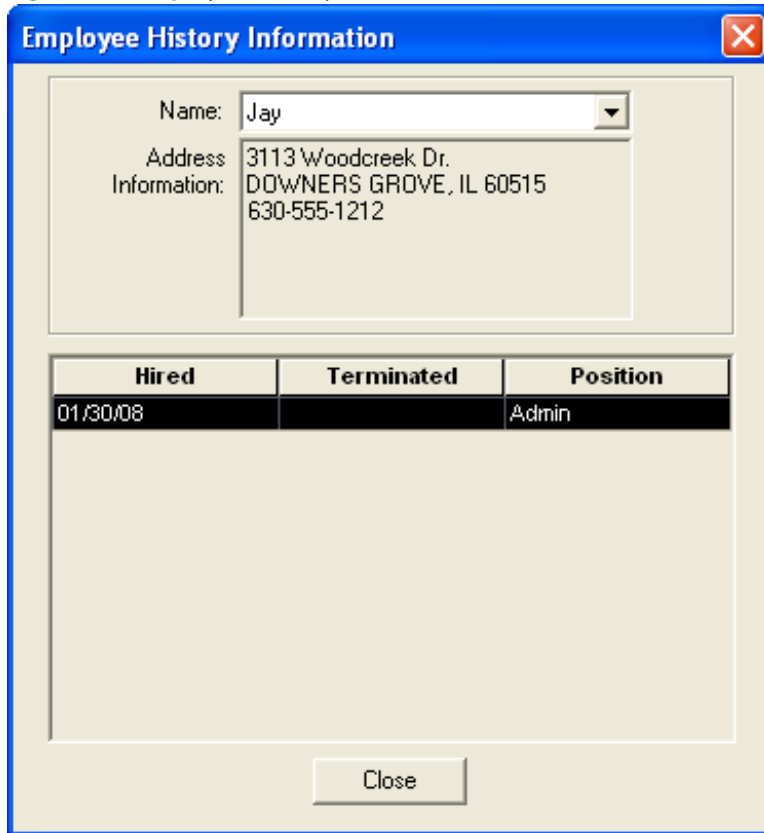
Figure 6-5: Employee Search Window



Employee History Information Window

The Employee History Information window displays an employee's address, phone number, position, date of hire, and termination.

Figure 6-6: Employee History Information Window



The screenshot shows a window titled "Employee History Information" with a blue title bar and a close button. The window contains a form with the following fields:

- Name: Jay (dropdown menu)
- Address Information: 3113 Woodcreek Dr., DOWNERS GROVE, IL 60515, 630-555-1212

Below the form is a table with three columns: Hired, Terminated, and Position. The first row of data shows the date 01/30/08 in the Hired column and Admin in the Position column. The Terminated column is empty. A "Close" button is located at the bottom of the window.

Hired	Terminated	Position
01/30/08		Admin

In the Name field, click the down arrow and select the employee's name. The employment history information will display.

Employee Sales Report Window

The Employee Sales Report window displays an employee's total number of transactions and total sales volume for a given date range. You can use this window to generate an employee sales report.

Figure 6-7: Employee Sales Report Window

From Date	To Date	Order Count	Order Amount
02/18/03	02/18/03	14	1749.31

Generating an Employee Sales Report

TASK

To generate an Employee Sales Report from the Employee Sales Report window:

- 1 On the **Management** menu, click **Employee Sales Summary**. The **Employee Sales Report** window opens.
- 2 At the top of the window, select whether you would like to display **Daily Sales Data**, **Weekly Sales Data**, or **Monthly Sales Data**. For example, if you choose weekly sales data, the total number of transactions and the total volume of sales (for the given employee) will display per week.
- 3 In the **Employee Name** field, click the down arrow and choose the employee's name.
- 4 Select a beginning date. Click the down arrow in the **From Date** field to select the starting date for which you would like to display statistics.
- 5 Select an ending date. Click the down arrow in the **To Date** field to select the ending date for which you would like to display statistics.
- 6 Click **Search**. The employee sales report will display.
- 7 Click **Print** to print the report.

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. 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" containing "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 'Last Purchase Date' field. The footer contains buttons for 'Save', 'Print', 'Previous', 'Next', 'Delete', 'Escape', and a 'Batch Mode' checkbox.

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	Return of Sale #591	-8.55	-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

1

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:

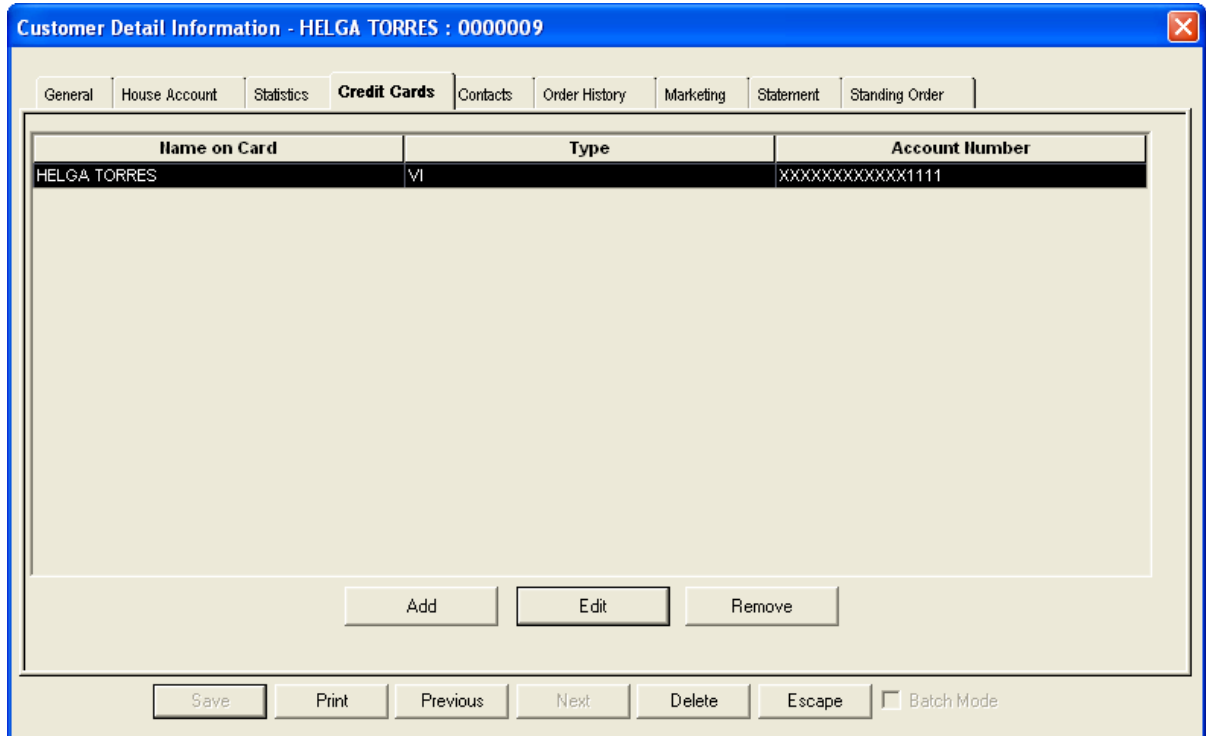
Table 7-9: Customer Account Balance Detail Report Columns

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 in the top right corner. The window contains four input fields: "Name" with the value "HELGA TORRES", "Number" with a masked value "XXXX XXXXXXXX XXXX", "Type" with the value "Visa", and "Expiration date" with the value "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.

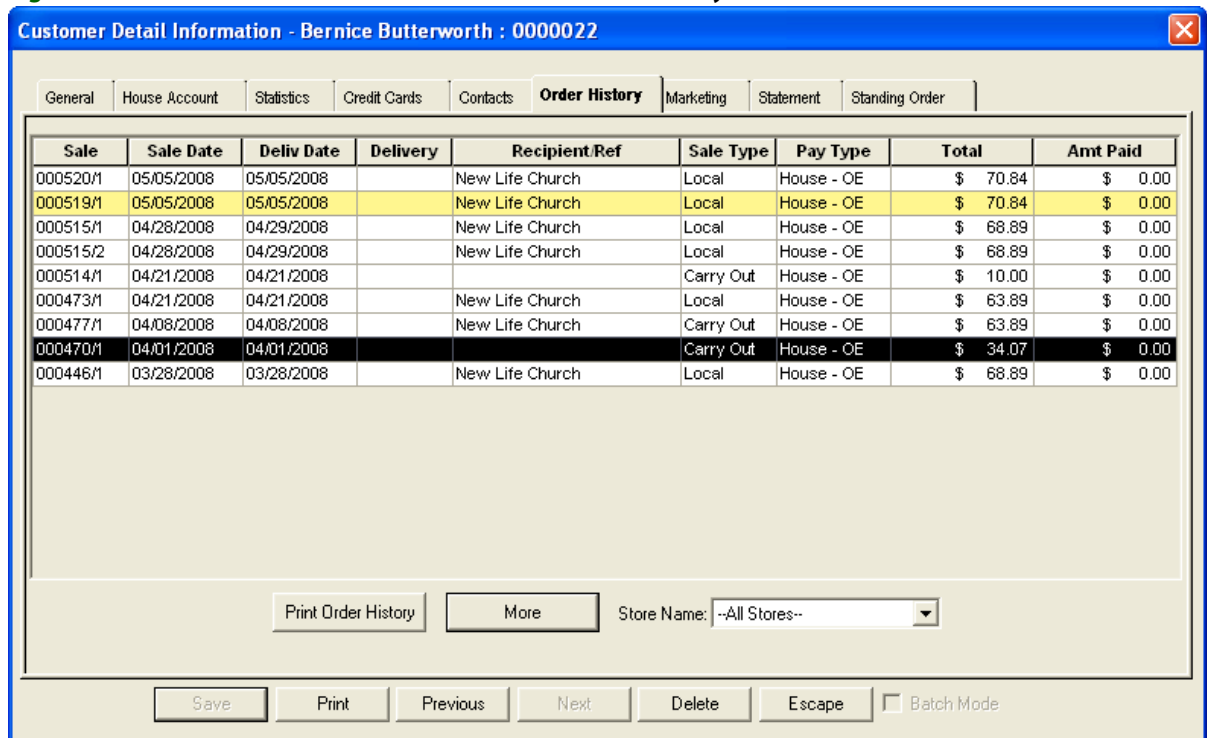
Order History Tab

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.

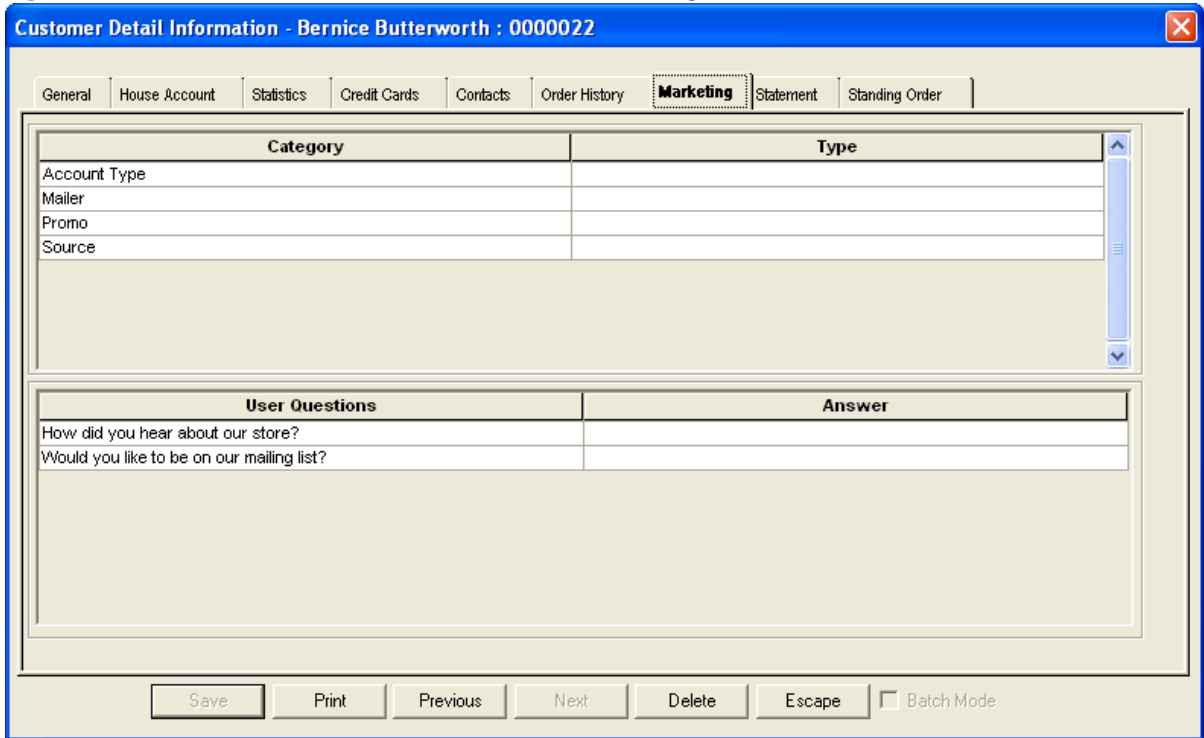
NOTE Finance charges are included on the report generated from Print Order History.

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

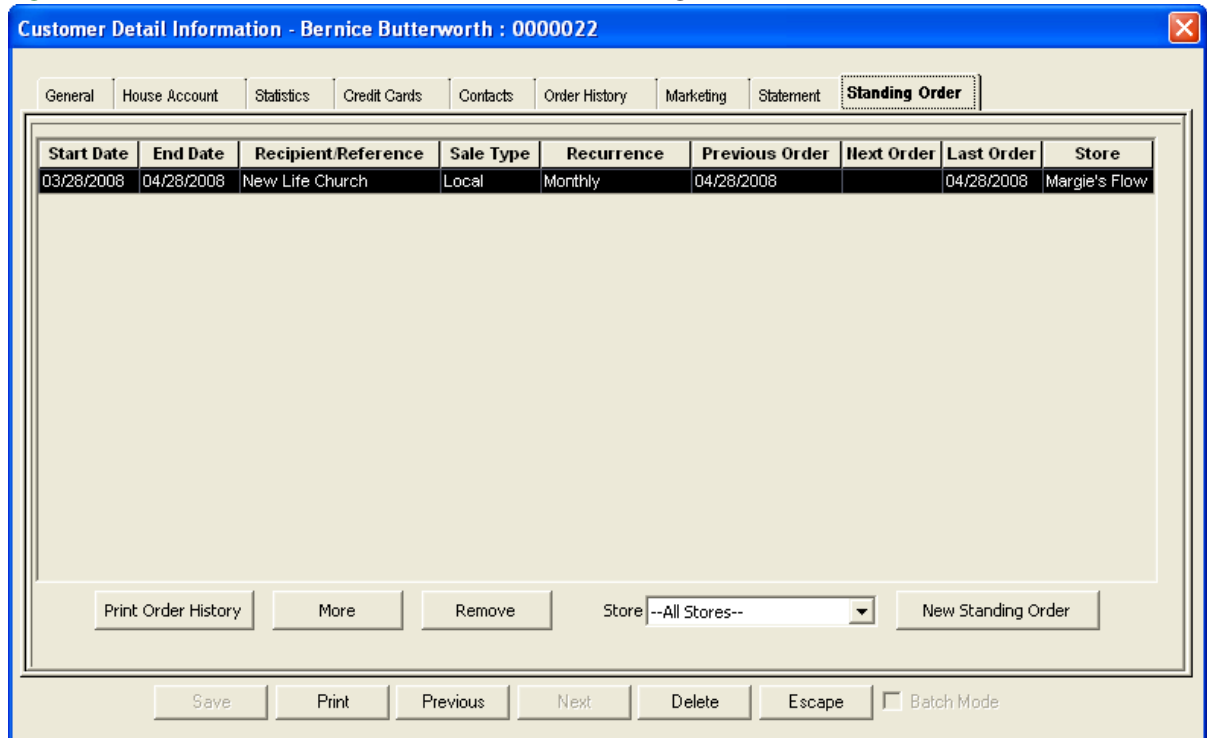
Save Print Previous Next Delete Escape Batch Mode

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.

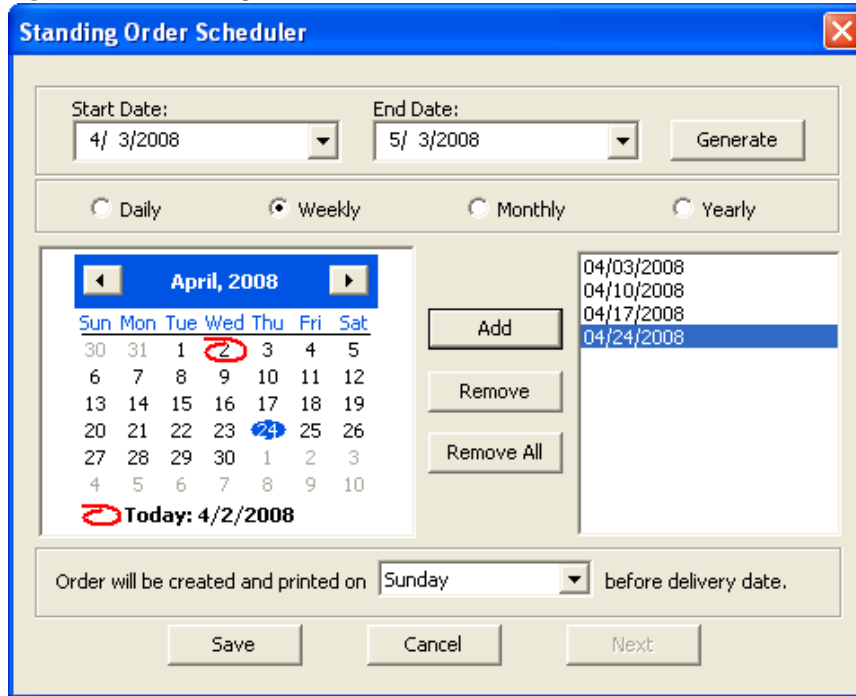
Below the grid, if you select a store from the Store Name list, you can see all standing order templates associated with the customer that were created for the selected store. You can also select All Stores to see a comprehensive list of all standing order templates associated with the customer. If there 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> <hr/>
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.

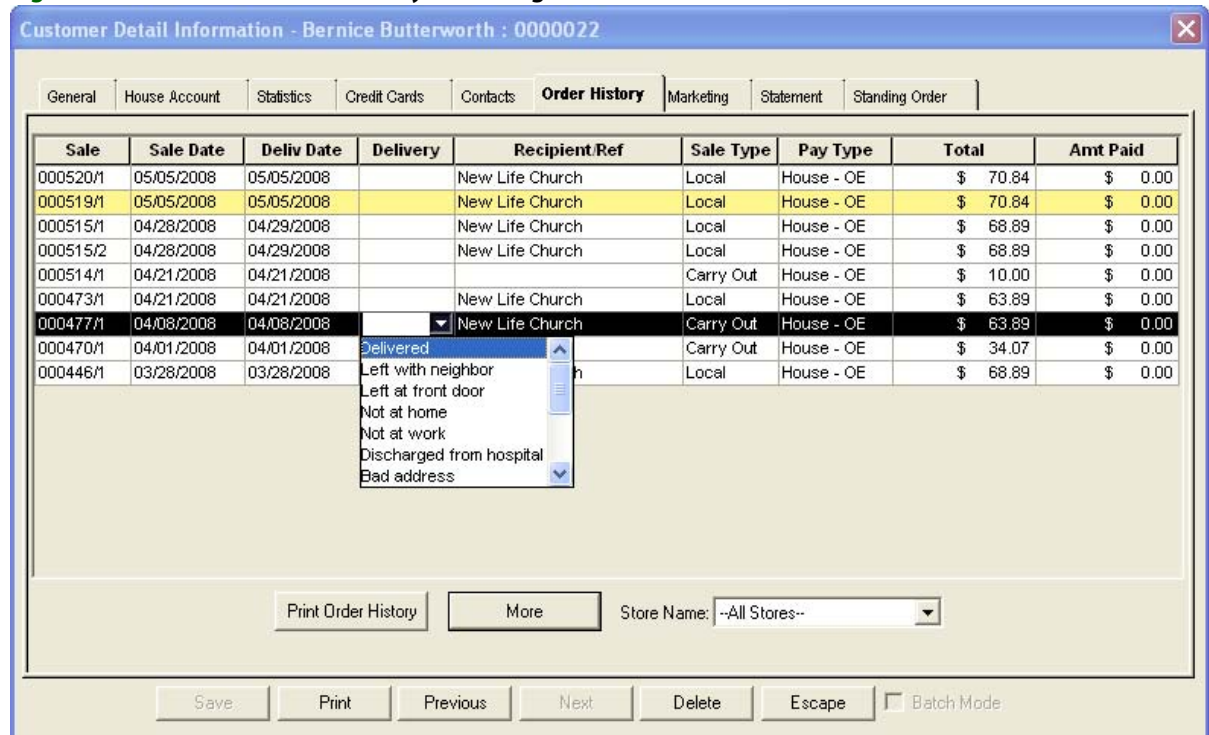
By default, orders from all stores display. To view orders only from a particular store, change the store name in the Store Name field and the screen refreshes automatically.

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



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

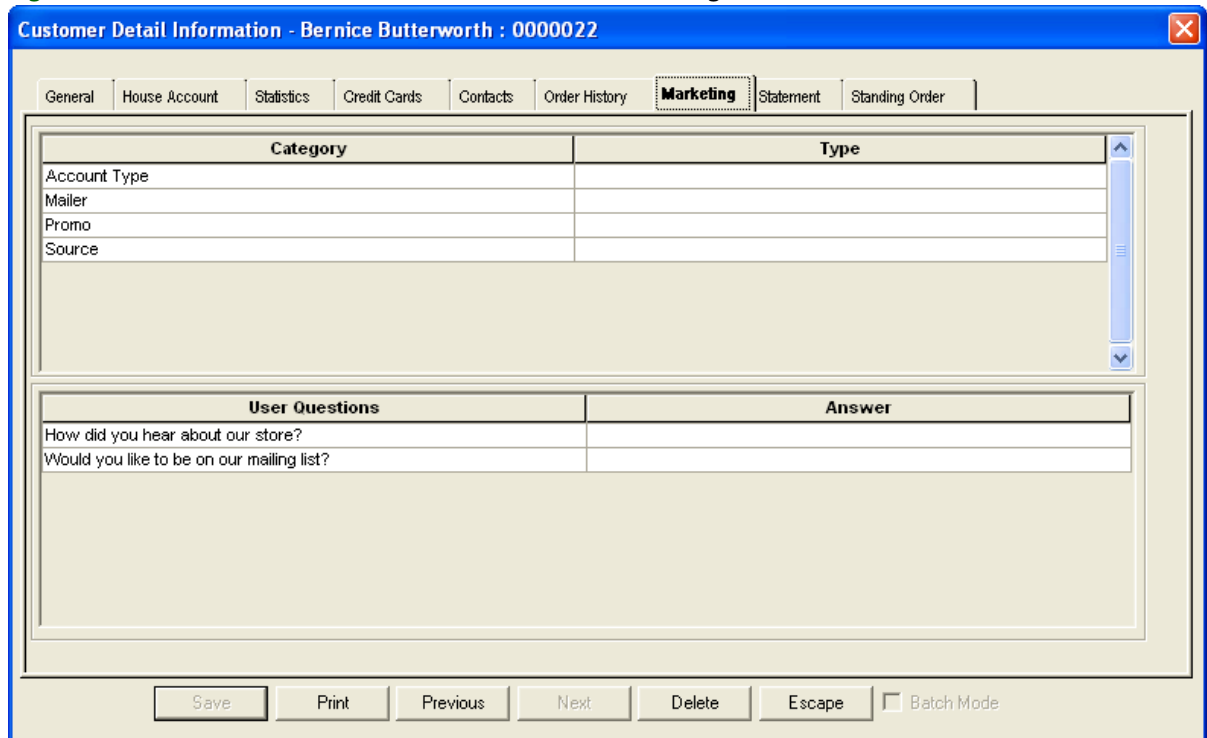
The Marketing tab allows you assign marketing categories to your customers. Marketing categories help you market to your customers more efficiently. For example, you may want to send marketing letters to customers with a birthday in February, or send a list of specials to your business accounts.

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.

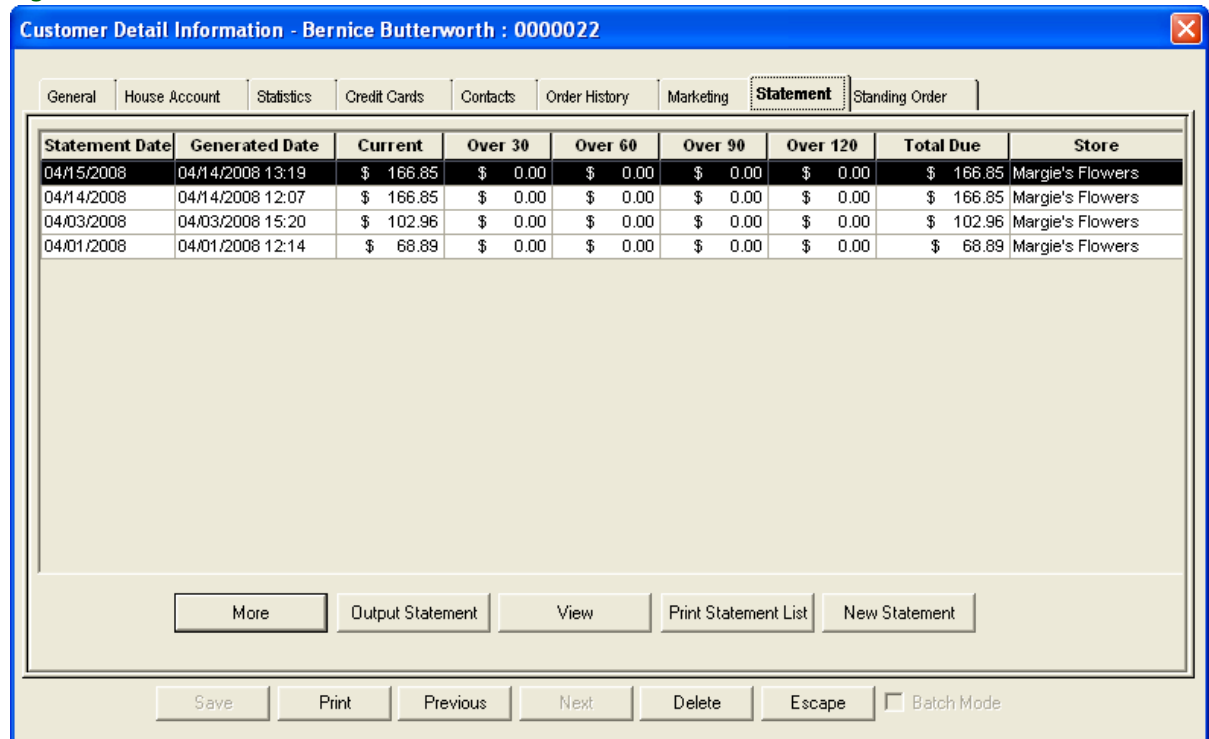
When you are finished selecting categories for the customer, click Save to save your changes.

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

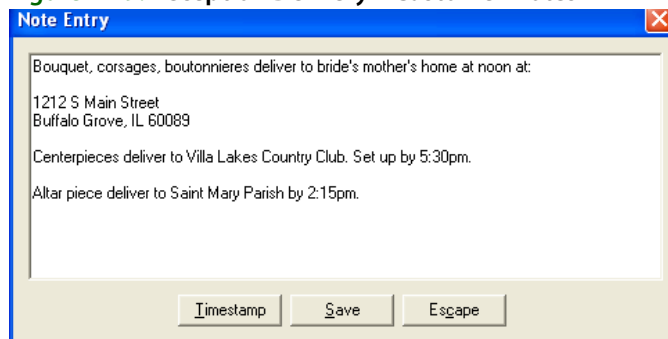
You do not maintain this account like a regular house account. Because the customer will most likely be making several payments over a span of months, you do not want to print statements for the customer or charge finance charges.

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 components:

- 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 Table:**

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**.

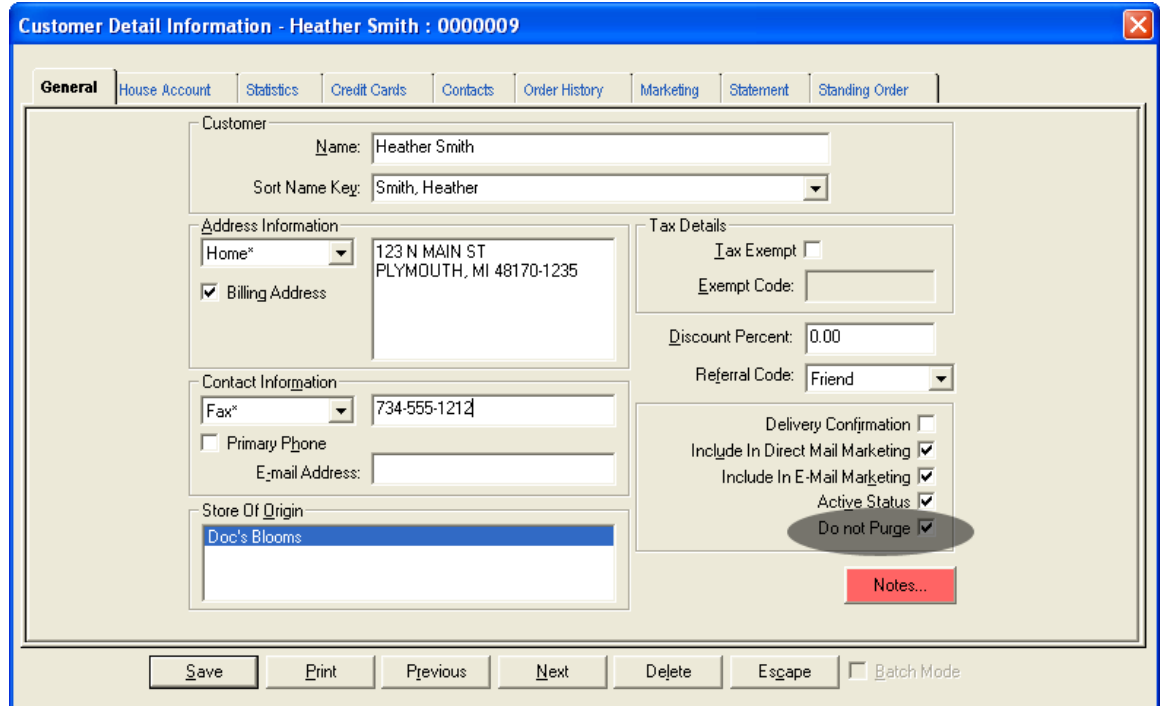
Protecting Customers from Customer Purge

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

Product Maintenance

The products you sell in your store include your wire service–branded products as well as any custom products that you sell. FTD Mercury is loaded with your wire service and Selection Guide products, and these products are arranged by product codes. Product codes are a way for you and FTD Mercury to track what is being sold in your store.

Product codes also help you when you are processing an order. For example, when a customer requests an FTD-branded product, enter the product’s code and the product information is completed for you. This way, your system knows which product is to be sent, eliminating product entry errors and faulty pricing.

Product Codes

Product codes are abbreviations for products you sell in your store. They help you track sales and quantity on hand. Wire service–branded and Selection Guide products are installed in your system for you. FTD Mercury allows you to add your own products, and allows you to enter care and design information for each product in the database. You can also associate pictures with your products.

When sending a Mercury order, the Mercury Network uses the product codes in the product fields to determine if a filling florist can fill your order. The sending florist has control over the method used by the Mercury Network in scanning the choice fields of an order. If a sending florist enters product codes in both choice fields, the Mercury Network checks to see whether the filling florist is accepting either or both products. If not, it attempts to find another filling florist (unless the sending florist has decided not to auto forward).

Following are some examples:

Table 8-1: Product Codes in Mercury Orders

Scenario	Settings	Description
Both First and Second Choice Provided	First Choice	.PMU1
	Second Choice	.PMU2
	Action by Network	The Network checks to see if the filling florist is accepting either or both products. If not, it attempts to find another filling florist (unless No Auto Forwarding was selected in the order message).

Table 8-1: Product Codes in Mercury Orders (cont.)

Scenario	Settings	Description
First Choice and Non-Product Code Second Choice Provided	First Choice	.PMU1
	Second Choice	ONE DOZEN YELLOW ROSES
	Action by Network	The Network checks to see if the filling florist is accepting the .PMU1 product. The Network cannot interpret the Second Choice field because it is not a product code. If the filling florist does not carry the .PMU1 product or yellow roses, then it is the filling florist's responsibility to reject or forward the order.
First Choice and SIMILAR Second Choice Provided	First Choice	.PMU1
	Second Choice	SIMILAR
	Action by Network	The Network checks to see if the filling florist is accepting the .PMU1 product. The Network cannot interpret the Second Choice field because it is not a product code. If the filling florist does not carry the .PMU1 product, the florist tries to match the arrangement as best as it can. It is the filling store's responsibility to forward or reject orders it cannot fill or match appropriately.
Only First Choice Provided	First Choice	.PMU1
	Second Choice	
	Action by Network	The Network checks to see if the filling florist is accepting the .PMU1 product code. If not, it attempts to find another filling florist (unless No Auto Forwarding was selected in the order message). It is not recommended to leave the Second Choice field blank when sending Mercury orders.

Using Product Codes in Order Entry and Point of Sale

When entering the product information, type the product code and press **TAB** to allow the system to search for the product for you, or click the Search button (...) to browse your product database.

TIP

By default, when you click the Search button, it searches for any defined Quick Picks. You can still enter in search criteria and perform subsequent searches to browse your product database. If you do not have any products marked as Quick Picks, you will be able to browse your product database immediately. For more information, see [Quick Picks](#) on page 8-11.

Add products that you regularly sell into your product database to reduce order processing time (see [Adding New Products](#) on page 8-5). Wire service-branded products are set up for you.

If you have multiple stores, products are associated with each store. If in Order Entry or Point of Sale you type a product code of a product that is not associated with the store selected for the order, you receive the following message:

The product code you have entered is not available at this store. Use anyway?

Click **Yes** to use the product code anyway, or click **No** to select a different product code. If you select **Associate product with all stores** and then click **Yes**, you associate this product with all stores (this message will not appear the next time you select this product at this store).

Searching for Products

You can search for products from the FTD Mercury Main Menu (either from the Product search button or from the Search menu), the Order Entry window, and the Point of Sale window.

TASK To perform a product search:

- 1 On the **FTD Mercury Main Menu**, click the **Product Search** button. Additionally, in the **Order Entry** or **Point of Sale** window, in the **Products** area, click the **Search** button (...).
- 2 When the **Product Search** window opens, enter your search parameters and click **Search**. (When you use the **Product Name** parameter, Product Search searches against the product code and product name.) Products matching your parameters appear in the results list.

TIP You can also use a % symbol as a wildcard. If you just enter %, all products will be returned. If you enter some text before the wildcard (such as W%), Product Search will perform a search for all matches that start with W.

NOTE If you specify multiple search parameters, products must match all parameters to appear in the results list.

When you find the product you are looking for, double-click on the product or press the **SPACEBAR** when the product is highlighted to view detailed information or make changes to the product's information.

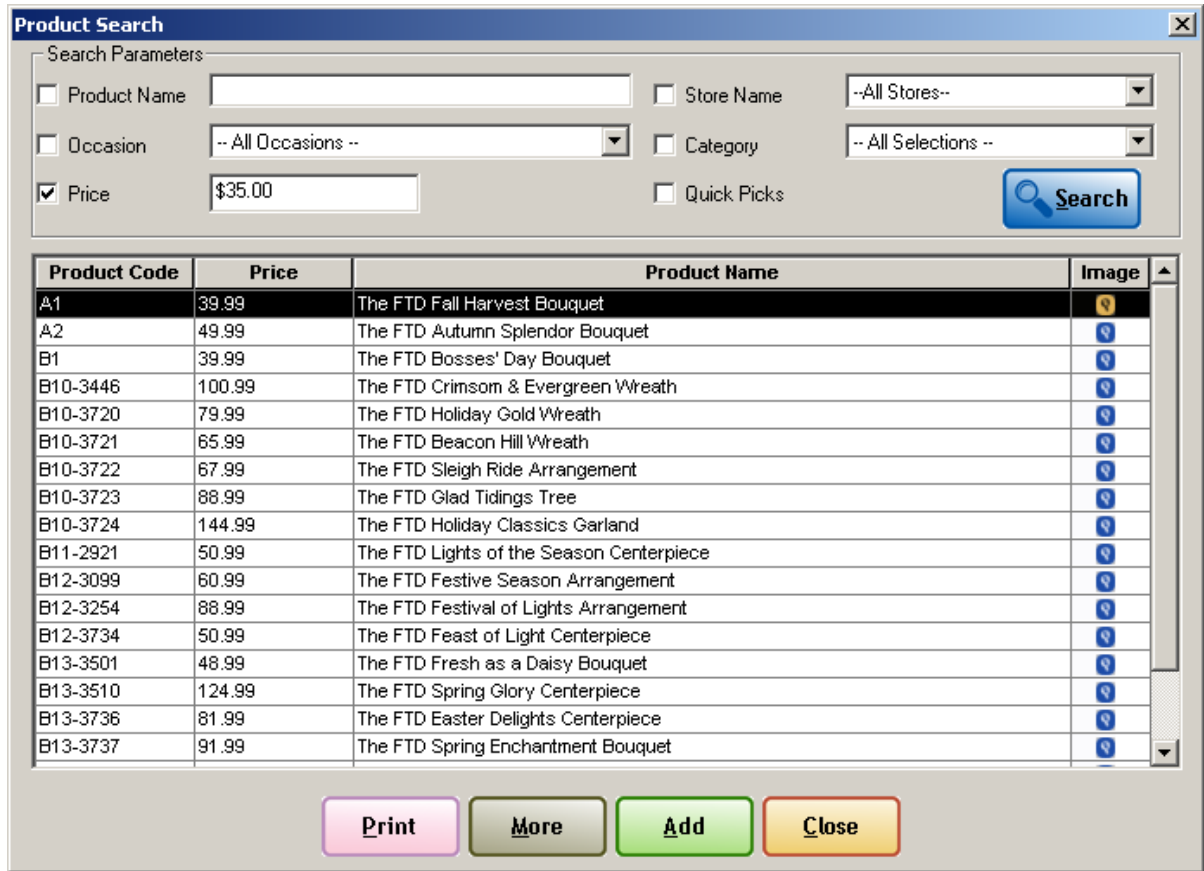
In most cases, you will be searching for a product while taking an order. Once you perform your search and locate the product, highlight it in the results list and click Select (you can also highlight and use the keyboard shortcut **ALT+L**). You are then returned to Order Entry or Point of Sale with the product entered in the Products area.

TIP If there are multiple price points for the product, you can select the appropriate price from the Price column in the Product Search results list prior to clicking Select. The appropriate price will be reflected when you return to Order Entry or Point of Sale. For more information, see [Multiple Price Points](#) on page 8-13 for details.

Product Search Window

The Product Search window is used to look for the products you sell in your shop. This window provides you access to all products in FTD Mercury. This window is most frequently used when looking up products (performing Product Searches) from Order Entry and Point of Sale. You can also access it by clicking the Product Search button on the FTD Mercury Main Menu.

Figure 8-1: Product Search Window



Search Parameters

If you search using multiple parameters, products must match all parameters to be included in the results list. You can use the following parameters when searching for products:

Table 8-2: Product Search Parameters

Parameter	Description
Product Name	Enter the product code or product name of the product for which you are searching. Product Search first searches against the Product Code, and if no matches are found, it will search against the Product Name. You can also use the % symbol as a wildcard.
Occasion	Select the occasion with which the product is associated. If you have products assigned to occasions, you can search for those products by selecting the occasion.
Price	Results will be included if the price on a product is the value you enter or above. For example, if you enter \$45.00, all products that are \$45.00 and above will be included in the search results.
Store Name	If you are a multi-store environment, select the store which sells the product.
Category	If you want to restrict the category, select it from this list.
Quick Picks	Select this option to display products that have been marked as Quick Pick items in their respective product details. For more information, see Quick Picks on page 8-11.

Results List

The results list displays products that match your search parameters. If you used multiple parameters, products must match all parameters to be included in the results list. When you double-click a product in the results list, it opens in the Product Entry window.

Each product has the following information displayed in individual columns:

Table 8-3: Search Results Columns

Column	Description
Product Code	The product code for the product.
Price	The product's price. If there are multiple price points for the product (see Multiple Price Points on page 8-13), you can select the price point you want to use for this product before clicking Select and returning to Order Entry or Point of Sale. When you return to the order, the selected price will be used.
Product Name	The product's name as it appears in the Product Entry window.
Image	If there is an image available for this product, an icon appears in this column. Click the icon to display the picture without opening the Product Entry window.

Button Ribbon

The following buttons are available in the button ribbon at the bottom of the window:

Table 8-4: Button Ribbon Buttons

Button	Description
Select	This button only appears if you access Product Search from Order Entry or Point of Sale. From the results list, highlight the product you want to use for the order and click Select (or press ALT+L). The Product Search window will close and the selected product appears in the Products area of the Order Entry or Point of Sale window.
Print	Click to print the results list.
More	Available if there are additional matching results that could not be displayed. Click to display the additional results.
Add	Opens the Product Entry window, allowing you to add a new product.
Close	Closes the window.

Adding New Products

FTD Mercury is preloaded with your wire service-branded and Selection Guide products; however, likely you will want add your own products to your system.

NOTE

You are only required to enter the **Local Product Code** and **Product Name** when adding a new product; other required fields already have default values.

TASK **To add a new local product:**

- 1 On the **File** menu, click **NewProduct**. Alternatively, if you are at the **Product Search** window, click **Add**.
- 2 In the **Local Product Code** field, enter the product code for the new product in any format. Typically, you will want to make this short and memorable so you do not have to search for it when entering orders.
- 3 In the **Product Name** field, type a short description for the product.
- 4 Configure other fields as necessary. For more details, see [Product Entry Window](#) on page 8-8.
- 5 If you want to add any additional notes for this product, click the **Notes** button and type them in.
- 6 If all the information is correct, click **Save**.

Adding Pictures to Products

You can also add your own pictures to local products (Selection Guide products already have pictures associated with them). You must have previously saved a new product before you can add a picture to it. You can either take a picture using the Logitech QuickCam, or browse to an existing picture.

NOTE If you are attaching pictures you are using for custom products that you will upload to your FOL Web site, FTD recommends the pictures are 300x300 pixels.

Product pictures are stored in C: \Wi ngs\Pi cs\Products.

Taking Pictures and Adding Them to Products

TASK **To add a picture to a local product using a live camera view:**

- 1 Perform a **Product Search** to locate the product to which you want to add a picture.
- 2 Double-click the product from the results list. The **Product Entry** window opens.
- 3 Click **Add Picture**. The **Picture Center** window opens.
- 4 Click **Camera View**.
- 5 Place the product so that it is in view of the Logitech QuickCam. If you want to change the camera settings, click **Change Settings** in the Logitech QuickCam toolbar.
- 6 Click **Take Picture**.
- 7 If you are satisfied with the picture, click **Attach**. The path to the picture appears in the **Attached Pictures** area.
- 8 Click **Escape** to close Picture Center.

The picture now appears in the Image area of the Product Entry window.

NOTE When you add a picture, you do not need to click Save.

Adding Existing Pictures to Products

TASK **To add a picture to a local product using a file:**

- 1 Perform a **Product Search** to locate the product to which you want to add a picture.
- 2 Double-click the product from the results list. The **Product Entry** window opens.
- 3 Click **Add Picture**. The **Picture Center** window opens.
- 4 Click **Browse**. The **Open Photo** window opens.
- 5 Browse to the picture you want to associate with the product and click **Open**.
- 6 Click **Attach**. The path to the picture appears in the **Attached Pictures** area.
- 7 Click **Escape** to close Picture Center.

The picture now appears in the Image area of the Product Entry window.

NOTE When you add a picture, you do not need to click Save.

Removing Pictures from Local Products

You can remove pictures you have added to local products. You cannot remove Selection Guide images.

TASK To remove a picture from a local product:

- 1 On the **FTD Mercury Main Menu**, click the **Product Search** button. The **Product Search** window opens.
- 2 Enter search parameters to locate the product from which you want to remove the picture. Click **Search**.
- 3 From the results list, double-click the product. The **Product Entry** window opens.
- 4 Click **Remove Picture**. The picture is removed.

NOTE Picture removal is instantaneous; you do not need to click Save.

If you remove an image, you are only disassociating it from the product. The picture remains in the C:\FTD Album\product folder.

Product Recipes

Each product in your system can have a recipe associated with it. By default, FTD Selection Guide products have their recipes included so your designers know the components that go into making up these products. Likewise, you can include recipes with your own products.

When you have configured to print recipes on Worksheets (in Mercury Administration), the entire recipe you enter (or was provided by the FTD Selection Guide) will be printed.

You enter or modify product recipes from the Product Entry window (accessible after you perform a Product Search).

TASK To add a recipe to a product:

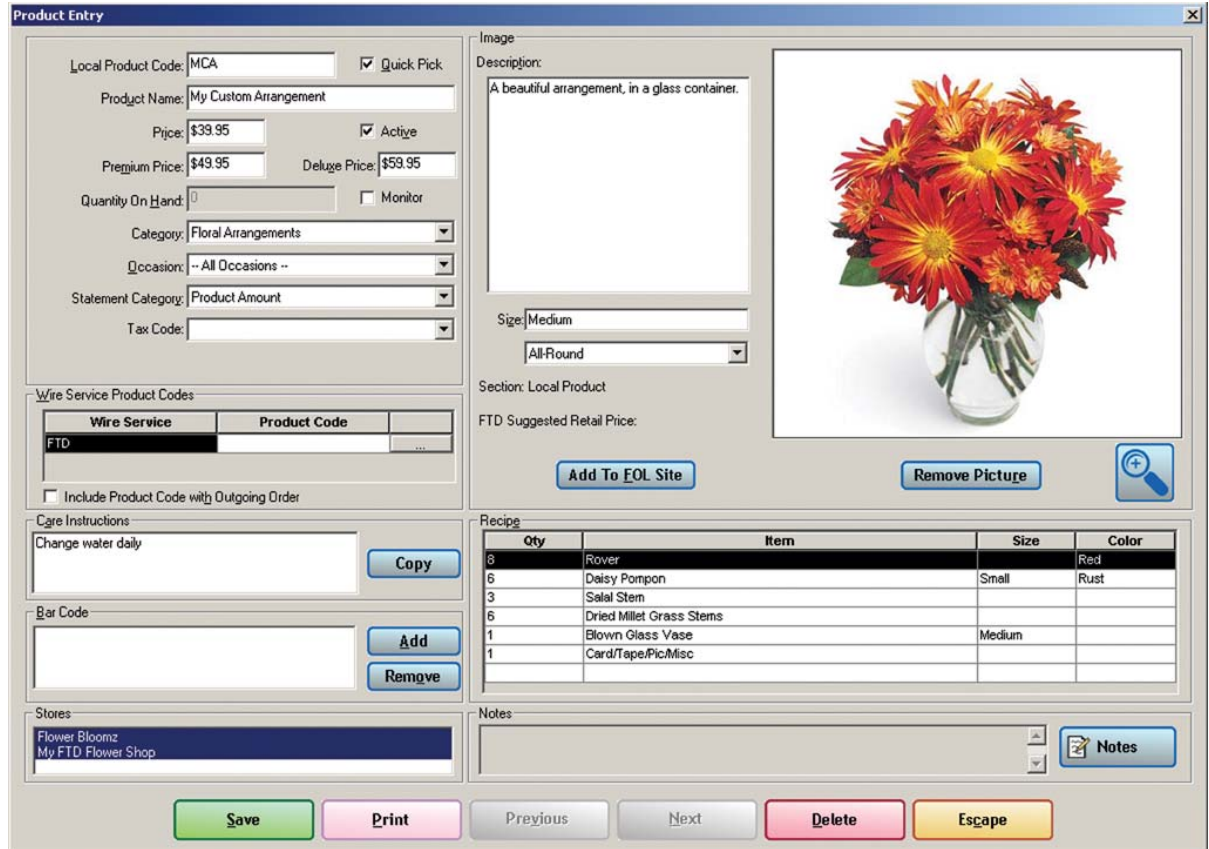
- 1 Perform a **Product Search** to locate the product to which you want to add the recipe.
- 2 Double-click the product from the results list. The Product Entry window opens.
- 3 In the Recipe area:
 - a. Click in the **Qty** column of the blank row. Enter the quantity the item you are entering. Press **TAB** to move to the next column.
 - b. In the **Item** column, enter the name of the item (for example, Oriental Lily stem). Press **TAB**.
 - c. In the **Size** column, enter a size for the item. Press **TAB**.
 - d. In the **Color** column, enter a color for the item.
 - e. If you have additional items to add to the recipe, press **TAB** to tab to another line and repeat steps a–d.
- 4 Click **Save** to save your changes.

TIP If you have multiple price points for the product, you can add additional lines to the recipes and indicate in the Item column instructions for each additional price point.

Product Entry Window

The Product Entry window opens when you either view a product's details (by double-clicking a product in Product Search) or when you add a new product to FTD Mercury.

Figure 8-2: Product Entry Window



The window is divided into several areas.

Product Details

The main area of the Product Entry window is for product details. You can enter the following information:

Table 8-5: Product Detail Options

Option	Description
Local Product Code	Enter the product code in any format for this product. Typically, this should be short and memorable so you do not have to search for it when entering orders. This is a required field.
Quick Pick	Select this check box if you want this item to appear in the Quick Pick list. For more information, see Quick Picks on page 8-11.
Product Name	Enter a short name for the product. This is a required field.

Table 8-5: Product Detail Options (cont.)

Option	Description
Active	Select this check box if you want to offer this item for sale. If this check box is cleared, the product is marked as inactive in your system. If you attempt to enter this product code in Order Entry or Point of Sale, you will be prompted to confirm you really want to use this inactive product. When you perform a Product Search from Order Entry or Point of Sale, inactive products will not appear in the results list.
Price	Provide a default price for the product. When the product is chosen for purchase, this price appears automatically. For more information, see Multiple Price Points on page 8-13.
Premium Price	Enter the price for the middle price point for the product. For more information, see Multiple Price Points on page 8-13. This field is enabled only if the value for Price is greater than \$0.00.
Deluxe Price	Enter the price for the top tier of the product. For more information, see Multiple Price Points on page 8-13. This field is enabled only if the value for Price is greater than \$0.00.
Quantity on Hand	When the Monitor check box is selected, you can enter the number of this item you have in stock in this field. Ensure you update the quantity when you receive more in stock.
Monitor	Select this check box if you want FTD Mercury to monitor your inventory and warn you when the quantity on hand is less than or equal to zero. When you select this check box, the Quantity on Hand field becomes enabled.
Category	Click the arrow and designate the category for this product. By default, all Selection Guide products have the category of Other. <hr/> TIP: Because Selection Guide products have the category of Other, you should avoid using this product category for your own products. <hr/> Product category types are maintained in Mercury Administration.
Occasion	Select the occasion with which you want the product associated. You can then locate this product when you search by occasion. You can also select --All Occasions-- to designate this product as one that can be used for any occasion.
Statement Category	Click the arrow and select the category under which this product or fee should be displayed on customer statements. Ensure this matches the product type correctly. For example, ensure all delivery fees have this set to Delivery Charge and all relay fees (including Retrans) have this set to Relay Charge.
Tax Code	By default, this field is blank. If the product falls under a different tax code, click the arrow and select the appropriate code. The new tax code overrides the customer, store, and delivery zone tax codes for this product. Changing this value is useful if, for example, an item is food and is taxed differently than other items in an order.
GL Account Number	If you are using the legacy General Ledger module, the GL Account field is active. If you have the Accounting module, you cannot see this field. Enter the GL account number to which this product should be attributed in this field.

Wire Service Product Codes

This area allows you to associate a local product code with a wire service product code. For example, if you create a local product code for a balloon bouquet, you can associate that balloon bouquet with the FTD wire service product code for balloons (.BLN). Then, if Include Product Code with Outgoing Order is selected, the corresponding wire service code goes out with the outgoing order.

To select a wire service product code, click the Search button (...) and select the wire service product code from the resulting list.

Care Instructions

This area contains the care instructions for the product. If another product already has care instructions you want to use for this product, you can click Copy to search for that other product and copy the care instructions to this product.

Bar Code

If you want to associate a bar code with this product, you can click Add to display a window from which you can either scan the bar code or manually type in the bar code.

Stores

The Stores area lists the stores where this item is available. If you are a single store, this will always be your store. If you have multiple stores, you can select the stores where you are offering this product.

Image

The Image area allows you to describe the product, enter dimensions for it, and view/attach pictures of the arrangement for reference.

Table 8-6: Image Options & Buttons

Option/Button	Description
Description	Enter a description for this product.
Size	Enter the dimensions for this product. If this is an FTD Selection Guide product, this field is read-only.
Product Design	Select whether this product is one-sided or all around. You can also leave this field blank. If this is an FTD Selection Guide product, this list is disabled.
Section	If this is an FTD Product, the section in the selection guide where this product appears is listed here.
FTD Suggested Retail Price	If this is an FTD product, the suggested retail price appears here.
Add Picture	Click to associate a picture with the product. You can only associate new pictures with local products. For more information, see Adding Pictures to Products on page 8-6.
Remove Picture	Click to remove an associated product picture from a local product. If you remove an image, you are only disassociating it from the product. The picture remains in the C:\FTD Album\product folder.
Enlarge Button	Click to display a larger version of the product picture (if available).
Add to FOL Web Site	Click to upload the product to your Florists' Online (FOL) Web site.

Recipe

The Recipe area contains the recipe for the product. Each line can contain the quantity, item, size, and color for each component of the product. For more information, see [Product Recipes](#) on page 8-7.

Notes

Click the Notes button to open the Note Entry window and enter any notes about this product. Any notes entered appear in the Notes area (so you can read the notes without having to open the Note Entry window).

Quick Picks

You can designate items as Quick Picks in FTD Mercury. When you perform a Product Search from the Products grid in Order Entry or Point of Sale, the Product Search automatically returns all items marked as Quick Picks. Although you might already know the product codes for common items, designating an item as a Quick Pick can substantially help a person who is unfamiliar with the product codes. You can also easily change Quick Picks for each holiday.

Designating Products as a Quick Picks

TASK To designate a product as a Quick Pick:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 Enter your search parameters to locate the product and click **Search**.
- 3 From the results list, double-click on the product you want to make a Quick Pick. The **Product Entry** window opens.
- 4 Select the **Quick Pick** check box.
- 5 Click **Save**.
- 6 Click **Escape** to close the **Product Entry** window.
- 7 Click **Close** to close the **Product Search** window.

In subsequent Product Searches, the product you designated will show up as a Quick Pick.

Searching for Quick Picks

Typically, you search for Quick Picks from Order Entry or Point of Sale. However, if you perform a Product Search from the FTD Mercury Main Menu, you can also select Quick Pick as a search parameter.

TASK To search for a Quick Pick from Order Entry or Point of Sale:

In the **Products** grid in the **Order Entry** or **Point of Sale** window, click the **Search** button (...). The **Product Search** window opens and automatically performs a search for all Quick Picks.

TASK To search for a Quick Pick from the FTD Mercury Main Menu:

- 1 In the **Search** area, click **Product**. The **Product Search** window opens.
- 2 Select the **Quick Picks** check box.
- 3 Click **Search**.

Quick Picks appear in the results list.

Removing Products as Quick Picks

TASK To remove a product as a Quick Pick:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 Enter your search parameters to locate the product and click **Search**. (The fastest way may be to search using the **Quick Picks** parameter).
- 3 From the results list, double-click on the product you want to remove as a **Quick Pick**. The **Product Entry** window opens.
- 4 Clear the **Quick Pick** check box.
- 5 Click **Save**.
- 6 Click **Escape** to close the **Product Entry** window.
- 7 Click **Close** to close the **Product Search** window.

The product will no longer show up as a Quick Pick.

Copying Care Instructions

When you create a new product, you may want to use the same care instructions from an already existing product. FTD Mercury provides a mechanism for copying these instructions.

TASK To copy care instructions from one product to another:

- 1 Perform a product search and bring up the product detail of the product that you want to copy the care instructions to (or add a new product).
- 2 With the product detail on the screen, click the **Copy** button (located to the right of the **Care Instructions** field). This brings up the **Product Search** window.
- 3 Search for the product from which you want to copy the care instructions. Enter your search criteria and then click **Search**.
- 4 Highlight the product in the list and then click **Select**. (Do not double-click on the product; this brings up the product detail and does not copy the product information).
- 5 After clicking **Select**, the care instructions are copied into the **Care Instructions** field. Click **Save** to save the new care instructions.

Deleting Products

To delete a product from your system, you must first search for the product via a Product Search. The product will be deleted from your system permanently. You can only delete local products from your product database; you cannot delete Selection Guide products.

An alternative is to remove the check from the Active check box in the Product Entry window. This will cause a message to appear when you try to enter the product in the Products area in Order Entry or Point of Sale. Additionally, if you perform a Product Search from Order Entry or Point of Sale, inactive products do not appear in search results.

You can only delete local products; FTD Selection Guide products cannot be removed.

TASK To delete a product:

- 1 On the **FTD Mercury Main Menu**, click the **Product Search** button. The **Product Search** window opens.
- 2 Enter your search parameters and click **Search**.

- 3 From the results list, double-click on the product you want to delete. The product opens in the **Product Entry** window.
- 4 Click **Delete**. You will be prompted to confirm the deletion. Click **Yes**.
- 5 Click **Escape** to close the **Product Search** window.

Multiple Price Points

Each product can have up to three price points (good, better, best pricing). You can enter these values in the Product Detail window for any product. The lowest value is recorded in the Price field, the middle value is in the Premium Price field, and the top value is in the Deluxe Price field.

When you perform a Product Search and display results, you can click in the Price column to display a drop-down list of available prices. Select the price you want to use, and select the product. When you return to Order Entry or Point of Sale, the product is entered in the Products area with the price you selected.

FTD Mercury & Your FOL Web Site

You can use FTD Mercury to upload product pictures and pricing information to your Florists' Online (FOL) Web site. This functionality is available when:

- » An image is associated with the product (for information on adding pictures to products, see [Adding Pictures to Products](#) on page 8–6). Pictures should be 300x300 pixels for best results on your FOL Web site.
- » The product is not an FTD-branded product.

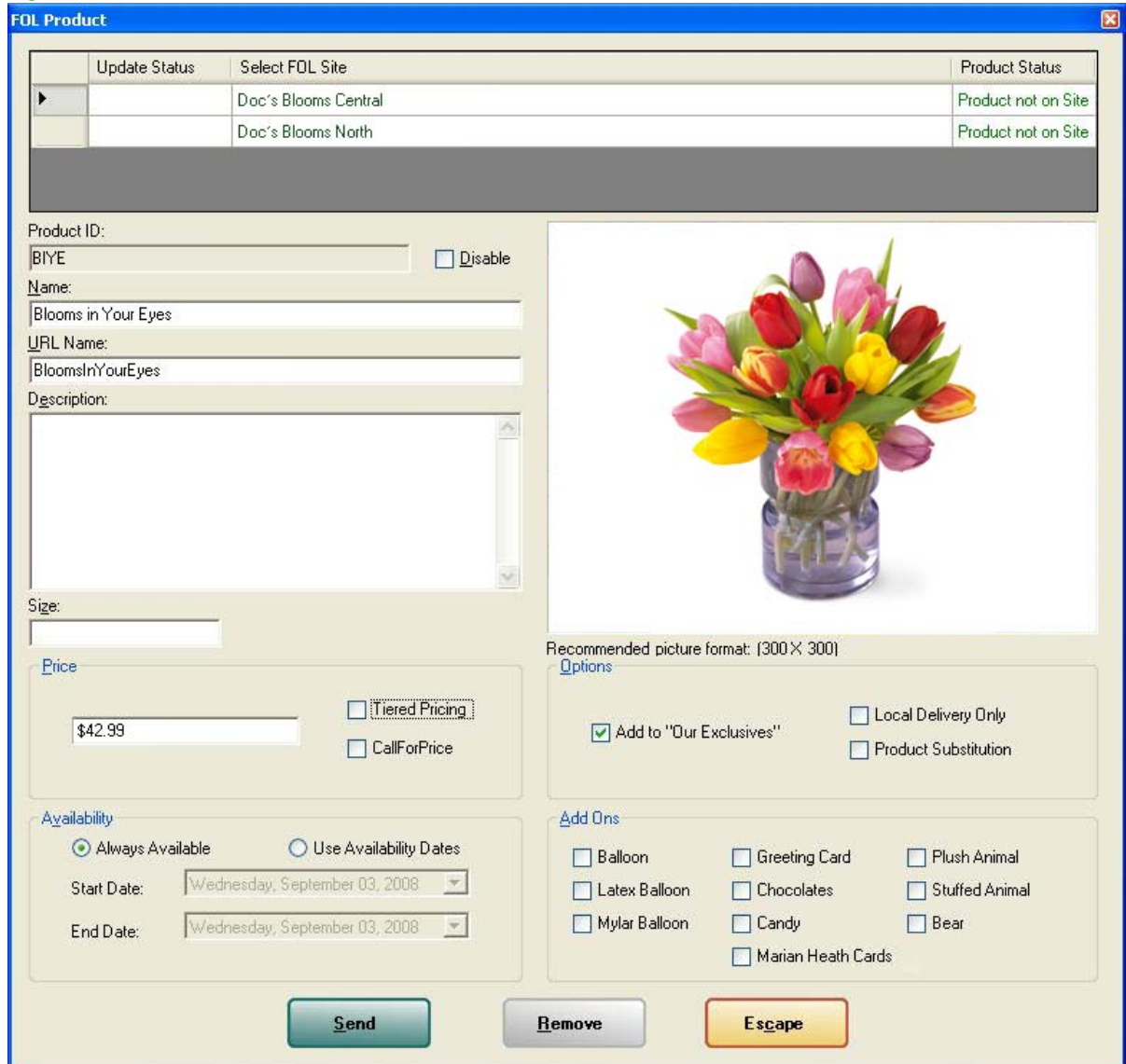
When you maintain products on your FOL Web site from FTD Mercury, the product codes must match (that is, your local product code must be used for the FOL Product ID). If you change a local product code, the link between FTD Mercury and the FOL site is broken and the local product will no longer be associated with the product on your site. If you delete a product in FTD Mercury, the product is not removed from your FOL Web site (maintenance of the product then must be handled through the FOL Web portal).

FOL Product Window

The FOL Product window allows you to configure product information prior to uploading it from FTD Mercury to your FOL Web site. If a product does not yet exist on your FOL Web site, details are populated from information in the Product Entry window. However, if the product does exist, the FOL Product window displays the details from the FOL Web site.

NOTE The picture displayed in this window will always be the one displayed in the Product Entry window for this product.

Figure 8-3: FOL Product Window



The window contains the following areas:

FOL Site

The FOL Site area provides information about the current product status and update status for each of your FOL Web sites.

Table 8-7: FOL Site Area

Column	Description
Select FOL Site	Displays a list of your available FOL Web sites.
Product Status	Displays the current product status, which can be one of the following: <ul style="list-style-type: none"> » Active—the product exists on the FOL site and is active. » Disabled—the product exists on the FOL site, but is currently disabled. The background color for products that exist but are disabled is yellow. » Does Not Exist—the product does not exist on the FOL site (after a successful removal of a product, its status will change to Does Not Exist). The text color for products that do not exist is green.

Table 8-7: FOL Site Area (cont.)

Column	Description
Update Status	<p>Displays the status of the update. This can be one of the following:</p> <ul style="list-style-type: none"> » Blank—displays if you have yet to click the Send or Remove buttons » Pending—the update is being processed » Updated—the product has been created or updated successfully » Removed—the product has been successfully removed from your FOL site » Error—the response received contains an error code

Product Information

The product information area contains the following information:

Table 8-8: Product Information Fields

Field	Description
Product ID	<p>The Product ID. This is automatically populated from the local product code for this product, and is not editable from this window. However, if the local product code format does not conform to FOL product ID requirements (maximum of 20 alphanumeric characters with no spaces), you will be prompted to change the local product code when you attempt to upload the item to your site.</p> <p>If you select the Disable check box, the product will be disabled when you add or update the product on your site by clicking the Send button.</p>
Name	Enter the name of the product as it will appear on your FOL site.
URL Name	Enter the URL for the product. (If a URL contains spaces, they will automatically be converted to underscores.)
Description	Enter a description for the product. The default text comes from the description entered in the Product Entry window.
Size	Enter the size for the product. By default, this comes from the size entered in the Product Entry window.

Price

Enter the price for this product. If you want to enable multiple price points for this product, select the Tiered Pricing box. (Once selected, the price you enter will be the lowest tier for tiered pricing.) You can also select the Call for Price box to not list a price for the product and advise customers to call you for pricing. (If you select Call for Price, other pricing information will be ignored.)

Availability

Select whether you want to always have this product available on your FOL Web site, or want it only available between certain dates. If you select Use Availability Dates, enter a start date and an end date for product availability.

Options

Select from the following options for this product:

Table 8-9: Product Options

Option	Description
Add to "Our Exclusives"	Select this check box to add this product to the "Our Exclusives" portion of your FOL site. By default, this option is selected. IMPORTANT: This option must be selected for the product to appear on your FOL Web site.
Local Delivery Only	Select this check box to mark this product as local delivery only on your site.
Product Substitution	If you select this option, the product can be substituted for a similar product. If this option is cleared, no product substitution is allowed for this product.

Add Ons

Select the add on(s) you want to make available with this product. You can choose from the following:

- » Balloon
- » Latex balloon
- » Mylar balloon
- » Greeting card
- » Chocolates
- » Candy
- » Marion Heath cards
- » Plush animal
- » Stuffed animal
- » Bear

Button Ribbon

The button ribbon includes the following buttons:

Table 8-10: Ribbon Bar Buttons

Button	Description
Send	Click this button to either add a product (if it does not yet exist on your FOL Web site) or update it (if it already exists).
Remove	Click this button to remove the product from your FOL Web site.
Escape	Click this button to close the FOL Product window without uploading the product to or removing the product from your FOL Web site.

Adding Custom Products to Your FOL Web Site

TASK To add a custom product to your FOL Web site:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 Enter criteria to locate the product and click **Search**.
- 3 From the results list, double-click the product. The **Product Entry** window opens.
- 4 Click the **Add to FOL Web Site** button. The **FOL Product** window opens.

NOTE The Add to FOL Web Site button is only available when you are adding a custom product that already has an image associated with it.

- 5 Select the FOL Web site to which you want to add the product.
- 6 The window displays details about the product from the **Product Entry** window. Edit product details as necessary.
- 7 Click **Send**.

Once the product has been successfully uploaded, the Product Status will change to Active and the Update Status will change to Updated.

Editing Custom Products on Your FOL Web Site

TASK To edit details about a custom product on your FOL Web site:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 Enter criteria to locate the product and click **Search**.
- 3 From the results list, double-click the product. The **Product Entry** window opens.
- 4 Click the **Add to FOL Web Site** button. The **FOL Product** window opens.
- 5 Select the FOL Web site for the product you are editing.
- 6 The window displays details about the product as it currently exists on the selected FOL Web site. Edit the product details as necessary.
- 7 Click **Send**.

Once the product has been successfully edited, the Update Status will change to Updated.

Removing Custom Products from Your FOL Web Site

IMPORTANT You can only remove a custom product from your FOL Web site via FTD Mercury if you have a corresponding product in FTD Mercury. If you already have products on your FOL Web site that you want to maintain in FTD Mercury, you can add a new product with a product ID that matches the FOL Web site product ID.

TASK To remove a custom product from your FOL Web site:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 Enter criteria to locate the product and click **Search**.
- 3 From the results list, double-click the product. The **Product Entry** window opens.
- 4 Click the **Add to FOL Web Site** button. The **FOL Product** window opens.
- 5 From the FOL site list, click the site from which you want to remove the product.

NOTE If the product status is Does Not Exist, the product is not listed on your FOL Web site (and therefore cannot be removed).

6 Click **Remove**.

Once removal has happened successfully, the Update Status column will change to Removed and the Product Status column will change to Does Not Exist.

Deactivating Custom Products on Your FOL Web Site

You can deactivate a product on your FOL Web site, allowing you to continue to have the product on the site, but not show it to customers. This is particularly useful if you are out of stock on an item, or if it is used only for particular holidays.

TASK To deactivate a custom product on your FOL Web site:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 Enter criteria to locate the product and click **Search**.
- 3 From the results list, double-click the product. The **Product Entry** window opens.
- 4 Click the **Add to FOL Web Site** button. The **FOL Product** window opens.
- 5 Select the FOL site for the product you want to deactivate. (You must pick a site where the Product Status is active.)
- 6 The window displays information about the product as it currently exists on the selected Web site. In the product information area, click the **Disable** check box.
- 7 Click **Send**.

Once the product has been successfully marked as disabled, the Product Status will change to Disabled and the Update Status will change to Updated.

Changing the Price for Products on Your FOL Web Site

TASK To edit details about a custom product on your FOL Web site:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 Enter criteria to locate the product and click **Search**.
- 3 From the results list, double-click the product. The **Product Entry** window opens.
- 4 Click the **Add to FOL Web Site** button. The **FOL Product** window opens.
- 5 Select the FOL Web site for the product you are editing.
- 6 The window displays information about the product as it currently exists on the selected Web site. Change the price as desired.
- 7 Click **Send**.

Once the product has been successfully updated, the Update Status will change to Updated.

Gift Certificates

To set up your system so that your customers can purchase and redeem gift certificates, you must first set up a gift certificate product so that the gift certificate can be purchased in Order Entry and Point of Sale. A payment type of **Gift Certificate** has been added to the payment window in Order Entry and Point of Sale so that your customers can pay by gift certificate.

Setting Up Gift Certificates

To set up gift certificates in FTD Mercury, add a new product called “Gift Certificate” and set it up like you would any other product. The only unique setup for gift certificates is that you must select **Gift Certificate** as the statement category when you are setting up the product.

FTD Mercury allows great flexibility when working with gift certificates so you can customize how you want to issue and redeem them. For example, if you have custom gift certificates in your store, you can use the **Product Entry** window to monitor the quantity that you have on hand. Also, you should consider how the gift certificate should be taxed, according to the tax regulations in your state. Most often gift certificates are set up as tax exempt or no tax.

TIP FTD Mercury also allows you to use Gift Cards, which can be loaded and redeemed in your shop. For more information about getting set up with Gift Cards, contact FTD Technology Sales at 1-800-767-3222.

Coupons

FTD Mercury allows you to create coupons and to assign quantities and amounts. Coupons are set up similar to products, and can be taxable or non-taxable. Taxable coupons reduce the sale amount before taxes are calculated. Non-taxable coupons reduce the sale amount after the taxes are calculated.

Setting Up Coupons

TASK To add a coupon to FTD Mercury:

- 1 On the **FTD Mercury Main Menu**, click the **Product Search** button. The **Product Search** window opens.
- 2 Click **Add**. The **Product Entry** window opens.
- 3 In the **Local Product Code** field, type the product code for the coupon. In most cases, you will want to make this short and memorable so you do not have to look it up in the product search each time.
- 4 In the **Product Name** field, provide a name for the coupon.
- 5 In the **Price** field, enter the value of the coupon. This must be a positive value; FTD Mercury will interpret this value as the price off of the transaction.
- 6 Ensure the **Active** check box is selected.
- 7 Ensure the **Monitor** check box is cleared.
- 8 In the **Statement Category** list, click the arrow and select **Coupon**.
- 9 In the **Tax Code** list, click the arrow and select either the correct tax code for a taxable coupon or **Tax Exempt** for a non-taxable coupon.
- 10 In the **Description** field, enter a description for the coupon (if desired).
- 11 Click **Apply**.

Delivery Zones and Fees

If your store charges for delivery, you can set up multiple delivery zones and a delivery charge for each zone. After you set up your zones and charges, delivery charges are automatically entered in Order Entry and Point of Sale when you select a zone for delivery.

There are two ways that you can set up delivery zones:

- » **Using the Mercury Delivery application**—If you have purchased it, you can set up delivery zones in Mercury Delivery. You can set up delivery zones by postal codes, address, or by drawing a boundary on a map. See [Delivery Zones](#) on page 14–7.
- » **Within Mercury Administration**—If you do not have Mercury Delivery, the quickest and easiest way to set up delivery zones and delivery charges is within Mercury Administration. By setting up delivery zones in Mercury Administration, you are assigning delivery zones to postal codes (when a recipient address with a particular postal code is entered in Order Entry or Point of Sale, the associated delivery charge is added to the order automatically). See [Delivery Zone Screen](#) on page 24–43 for more information.

Bar Codes

FTD Mercury includes support for bar codes and bar code readers. You can either scan an existing bar code and assign it to a product, or you can create a new bar code for a product by manually entering an alphanumeric code as a bar code. Once you have associated a bar code with a product, you can use a bar code scanner when entering an order to scan products.

If you want to create and print bar code labels to use with your products, you must purchase your own third-party bar code creation software. You can typically find this software at an office supply store or on the Internet. Once you create bar code labels, you can affix them to your products so they can be scanned at in Point of Sale or Order Entry (see [Using Bar Codes](#) on page 9–83).

NOTE FTD does not support any third-party software for printing bar codes. However, to ensure you are purchasing bar code creation software that is compatible with your bar code scanner, consult the bar code scanner documentation. This documentation (or the manufacturer's Technical Support department) can tell you which software is compatible with your specific bar code scanner model.

For instructions on setting up an LS2208 bar code reader for use with a Cherry keyboard in FTD Mercury refer to [Bar Code Reader Configuration](#) on page E-1.

Associating Bar Codes with Products

TASK To associate a bar code with a product in FTD Mercury:

- 1 Either create a new product or perform a Product Search to locate an existing product.
- 2 In the **Bar Code** area, click **Add**.
- 3 Scan the bar code (if you already have a bar code reader) or enter the alphanumeric sequence in the **Bar Code** window.
- 4 Click **Save** to add the bar code to the list.
- 5 Click **Save** to save the change to the product.

Deleting Associated Bar Codes

TASK To delete a bar code already associated with a product:

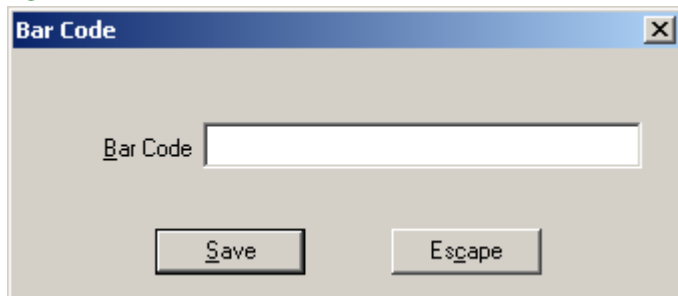
- 1 Perform a product search to locate the product from which you want to remove the bar code.
- 2 In the **Bar Code** area, select the bar code you want to delete.
- 3 Click **Remove**.

Click **Save** to save your change to the product.

Bar Code Window

The Bar Code window is used when you enter a bar code for a product. You can either scan the bar code or enter the code manually. Click **OK** when you are finished entering in the bar code.

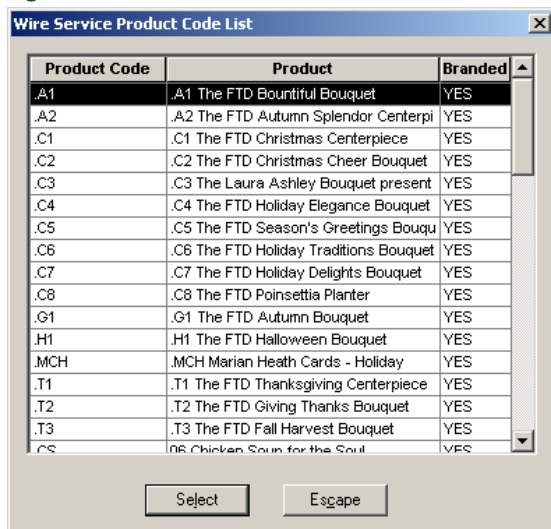
Figure 8-4: Bar Code Window



Wire Service Product Code List Window

This window displays a list of codified products that you can assign to your local product code. By assigning a codified product to your local product code, your staff can select local product codes in outgoing orders, and the filling florist will receive the wire service code equivalent.

Figure 8-5: Wire Service Product Code List Window



Working with Orders

In FTD Mercury, you spend the majority of your time working with orders. Using both Order Entry and Point of Sale, you can enter orders (or attach incoming orders via Message Center). You can also use Ticket Search to locate orders you have previously entered in FTD Mercury.

Order Tasks

The following are some order-related tasks that FTD Mercury enables you to perform. This is not an all-inclusive list; read further in this chapter for even more capabilities.

- » [Entering Carry Out Orders](#)
- » [Entering Orders for Pickup](#)
- » [Entering Orders for Local Delivery](#)
- » [Entering Wire Out Orders](#)
- » [Entering Phoned-Out Orders](#)
- » [Processing Incoming Wire Orders](#)
- » [Entering Phoned-In Orders](#)
- » [Filing Incomplete Orders](#)
- » [Taking Order Payments](#)

Additional tasks can be found in [Additional Order Tasks & Windows](#) on page 9–82.

Point of Sale vs. Order Entry

Although the Point of Sale and Order Entry windows are similar, the Point of Sale window provides access to Point of Sale equipment such as the receipt printer and cash drawer. The biggest difference between Point of Sale and Order Entry is that the delivery zone defaults to N/A when you use Point of Sale to allow quicker processing of cash and carry sales. Order Entry uses the default delivery zone depending on your configuration in Mercury Administration.

Using both Point of Sale and Order Entry, if you leave the customer blank, the default customer used is cash sales. The cash customer can be changed at any time to a customer account. The Point of Sale calculates change due on cash, check, debit, gift card, and gift certificate transactions. Customers cannot get change back on credit card or house charge transactions.

Because you manage the cash drawer through the Point of Sale window, you may process transactions from this window that are not sale related. For example, you can remove cash from or add cash to the drawer by using a paid in or paid out, or you can perform a Z-out, which helps you count the drawer and close out the current session.

The Point of Sale module also allows you to reprint receipts for any Point of Sale transaction. Receipts include the date and time that the receipt was printed, as well as the transaction date and time.

TIP You can print a Point of Sale receipt for an order entered in Order Entry if you open the order in Point of Sale and reprint the receipt.

The most noticeable difference between the Order Entry and Point of Sale windows are different field colors to help you distinguish whether you are currently in Order Entry or Point of Sale. The Order Entry window's fields (when not active) are blue; the Point of Sale window's fields are green. Additionally, the Receive Payment on Customer Account window also displays the Order Entry and Point of Sale colors depending on where you accessed it.

Figure 9-1: Order Entry Colors

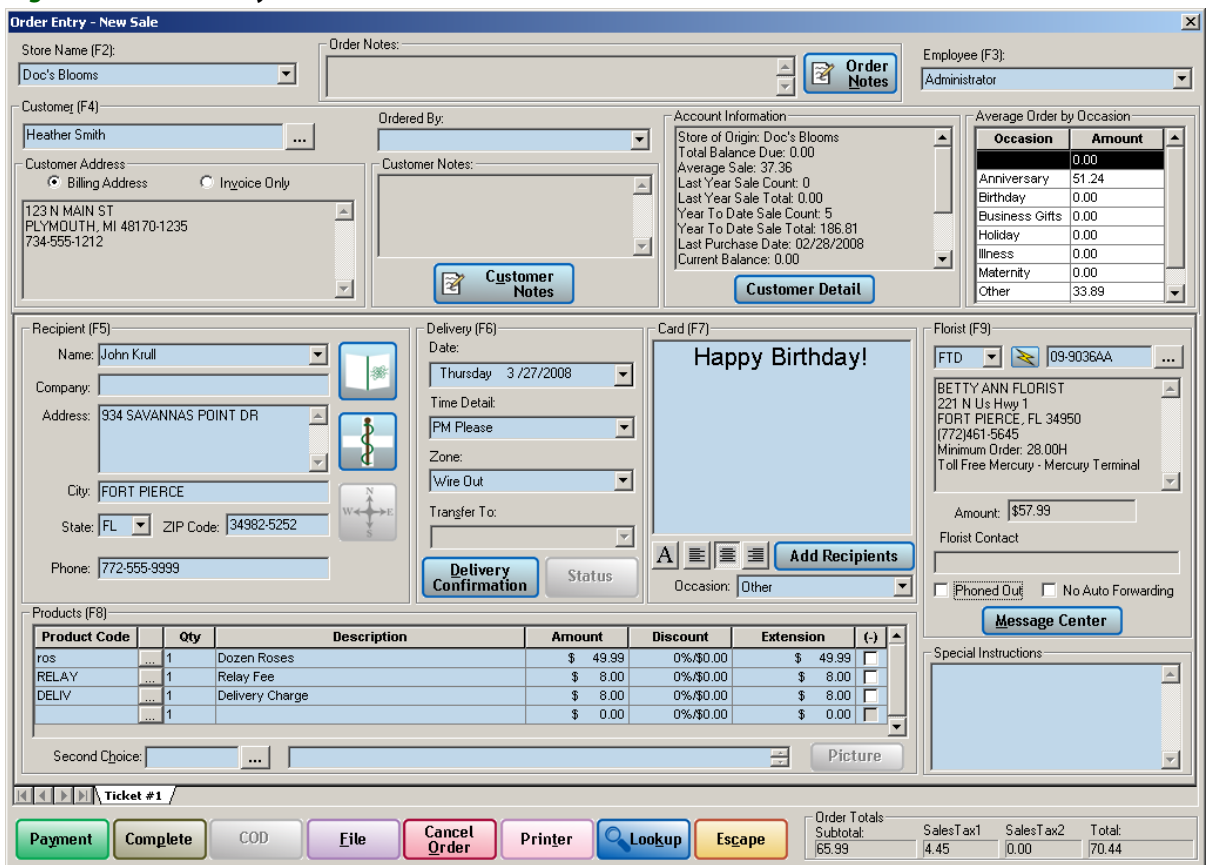


Figure 9-2: Point of Sale Colors

Point of Sale - New Sale

Store Name (F2): Doc's Blooms

Order Notes:

Employee (F3): Administrator

Customer (F4): Heather Smith

Ordered By:

Account Information:

Store of Origin: Doc's Blooms
 Total Balance Due: 0.00
 Average Sale: 37.36
 Last Year Sale Count: 0
 Last Year Sale Total: 0.00
 Year To Date Sale Count: 5
 Year To Date Sale Total: 186.81
 Last Purchase Date: 02/28/2008
 Current Balance: 0.00

\$\$\$ POINT OF SALE \$\$\$

X-Out Z-Out No Sale
 Paid Out/In Receive Payment

Recipient (F5): Name, Company, Address, City, State, ZIP Code, Phone

Delivery (F6): Date: Thursday 3/27/2008, Time Detail, Zone: N/A, Transfer To

Card (F7): Add Recipients, Occasion: Other

Florist (F9): FTD, Amount: \$0.00, Florist Contact, Phoned In, No Auto Forwarding, Message Center, Special Instructions

Product Code	Qty	Description	Amount	Discount	Extension	(-)
FTD BH	1	The FTD Big Hug Bouquet	\$ 37.99	0%/0.00	\$ 37.99	
	1		\$ 0.00	0%/0.00	\$ 0.00	

Second Choice:

Ticket #1

Payment Complete COD File Cancel Order Printer Lookup Escape

Order Totals:
 Subtotal: 37.99
 SalesTax1: 2.56
 SalesTax2: 0.00
 Total: 40.55

Another noticeable difference between Point of Sale and Order Entry is that when you access Point of Sale, you begin in the product grid (allowing for quick entry for cash and carry sales where no customer is required), whereas Order Entry begins in the Customer or Employee field (depending on your settings). This allows you to begin the sale immediately by entering the product information.

When to Use Order Entry vs. Point of Sale

If you have both Order Entry and Point of Sale, generally, you want to use Point of Sale if the customer is present to provide payment. If you are creating an order for later pickup, you should also use Point of Sale. This allows you access to the cash drawer. If the customer is not present, such as with phoned-in orders and wire orders, you should use Order Entry.

Order Entry Window

The **Order Entry** window is the primary interface for order entry in FTD Mercury (unless you are using a Point of Sale system, in which case the similar Point of Sale window is the primary interface; see [Point of Sale Window](#) on page 9–11 for details on the differences). The backgrounds on fields in the Order Entry window are light blue, as opposed to the Point of Sale window, where they are light green.

Figure 9-3: Order Entry Window

Occasion	Amount
Anniversary	51.24
Birthday	0.00
Business Gifts	0.00
Holiday	0.00
Illness	0.00
Maternity	0.00
Other	33.89

Product Code	Qty	Description	Amount	Discount	Extension	(-)
ros	1	Dozen Roses	\$ 49.99	0%/0.00	\$ 49.99	<input type="checkbox"/>
RELAY	1	Relay Fee	\$ 8.00	0%/0.00	\$ 8.00	<input type="checkbox"/>
DELIV	1	Delivery Charge	\$ 8.00	0%/0.00	\$ 8.00	<input type="checkbox"/>
	1		\$ 0.00	0%/0.00	\$ 0.00	<input type="checkbox"/>

Subtotal:	SalesTax1	SalesTax2	Total:
65.99	4.45	0.00	70.44

The **Order Entry** window contains the following areas, most of which you use to enter information about the order.

Store Name

If you are set up as a multistore system, select the store for the order from the Store Name list (Order Entry only). If you are entering a new order, select the appropriate store; for existing orders, this reflects the store with which the order is associated.

Press F2 to access this list.

Order Notes

If there are already order notes, they will automatically appear in the Order Notes field. If you need to add additional notes, click Order Notes to open the Note Entry window where you can enter them. For more information, see [Note Entry Window](#) on page 2-11.

Employee

From the Employee list, select your employee name. Depending on your system's configuration, this may be required for each order.

Press F3 to access this list.

Customer

You can press F4 to access this area, which contains the following areas and fields:

Table 9-1: Customer Areas/Fields

Area/Field	Description
Customer Name	<p>Enter the customer's name in this field and press Tab to perform a Customer Search. If only one customer from your database matches the name, the customer's information will automatically be filled in. If there are multiple matches, you are prompted to select the correct customer. If there is not a match, you can create a new customer in the Customer Detail Information window. In addition to the full customer name, you can enter a partial customer name or phone number to search for the customer.</p> <hr/> <p>TIP: If you are using the Caller ID lookup feature, when you accept the incoming call, an Order Entry window will automatically open and the phone number from Caller ID will automatically be used for a Customer Search.</p> <hr/>
Customer Address	In the Customer Address area, you can see either the billing address from the Customer Detail Information window, or you can select Invoice Only and enter an address that you only want to use for this invoice.
Ordered By	Enter the person who is placing the order. If the customer has previously placed orders, click the arrow at the right of this field to display a list of names and select the appropriate name. This field is particularly important if the Customer is actually a business.
Customer Notes	If there are already notes about this customer, they will automatically appear in the Customer Notes field. If you need to add additional notes, click the Customer Notes button to open a window and add the new notes. For more information, see Note Entry Window on page 2-11.
Account Information	The Account Information area contains data on purchase history, tax exempt status, and current account status. If it is a house account, it also includes the account number. This information is taken from the Customer Detail Information window and is provided for quick reference. If you want to see additional customer information, click the Customer Detail button.
Average Order by Occasion	This area displays the average order amount, broken down by occasion. You can then see the customer's ordering trends, which provides you an opportunity to upsell.

Recipient

The Recipient section is where you enter information about the recipient for the order. You can quickly access this section by pressing F5 on your keyboard.

Table 9-2: Recipient Fields

Field	Description
Name	Enter the recipient's name. You can also click the arrow at the right side of this field to display a list of all recipients this customer has previously placed orders for—if the recipient is in this list, you can select the recipient name and remaining recipient information is automatically populated. You can also use abbreviation codes to enter recipient information for common recipients. If you enter Same , FTD Mercury uses the customer as the recipient.
Company	If this order is being delivered to a business, enter the business name.
Address	Enter the street address for this recipient.
City	Enter the recipient's city.
State	Select the recipient's state or province.
ZIP Code	Enter the recipient's ZIP/postal code.
Phone	Enter the recipient's phone number.

If enabled in the FTD Mercury Configuration window, there is a Verify check box to the left of the recipient address. By default, if displayed, this option is selected. If you clear the Verify check box, the recipient address will not be checked by Address Verification (if you are licensed for Address Verification). This allows you to selectively override Address Verification for recipient addresses that will not verify (such as ones for new construction and not yet in the Centrus Address Verification data).

Funeral Log Button

If this order is for a funeral, click the Funeral Log button to open the Funeral Log. If you have already entered funeral details, you can select the appropriate funeral in the Funeral Log. You can also enter a new funeral if you have not previously entered it, and then select it. When you return to Order Entry or Point of Sale, information about the recipient will already be filled in. For more information, see [Handling Funerals](#) on page 9-50.

You can access this button by pressing **ALT+L** (hover over the button to see the shortcut).

Facility Search Button

Click this button to perform a Facility Search to locate a recipient's address in a hospital or nursing home. For more information, see [Facility Search](#) on page 5-13.

You can access this button by pressing **ALT+A** (hover over this button to see the shortcut).

Map It Button

Click this button to view a map of the recipient's address, your shop address, and the distance between them. You can access this button by pressing **ALT+I** (hover over this button to see the shortcut).

The Map It button is always enabled, but you may receive messages when you access it if you do not have required licenses or software.

- » If you are not licensed for Address Verification, a message displays with information about purchasing a license.

- » If Microsoft MapPoint is not installed, a message displays with information about purchasing a MapPoint license.
- » If your zone is not a local zone, a message displays informing you that you must select a local zone.
- » If the location of your shop address listed in the Florist Directory cannot be verified, a message displays indicating you need to contact FTD Member Services to update the address.
- » If the recipient address cannot be verified (or you elected not to verify it), a message displays indicating you cannot use the Map It feature unless the address is verified.

If you have address verification and your shop location is verifiable in the Florist Directory, a distance is displayed. This distance is from the verified recipient address to the shop currently selected in the Transfer To field (for single store configurations or if you have store transfer disabled to the selling store; if you change the value of the field, the distance changes). If the distance is more than 999 miles or 999 kilometers, the distance is listed as >999 miles or >999 kilometers.

Product

In the Product area, enter information about the products being ordered. You can access this area by pressing F8.

Product Grid

The product grid is where you enter product information for the ticket. It includes any items on the ticket (typically arrangements), delivery charges, and other fees. Depending on how you have your delivery zones configured, delivery fees may already be in the product grid once you enter the address or select a zone.

The following information is displayed in each row:

Table 9-3: Product Grid Columns

Column	Description
Product Code	Enter the product code for the item the customer is ordering. You can also click the Search button (...) to open the Product Search window and locate the product. By default, if you click the Search button when you have not yet entered a product code, Product Search will display the list of your shop's Quick Picks. If you enter a value for the product code and click the Search button, Product Search displays all products matching that product code (including partial matches).
Qty	The number of this item the customer is purchasing.
Description	The product name (based on product information). You can also enter additional information in this field.
Amount	The price for the item.
Discount	Any discount you want to apply. You can enter a percent or a dollar amount (if you have a decimal point, it is entered as dollars; if you enter a number only, it is assumed to be a percentage). If the customer already has a discount associated with them in the Customer Detail Information window, this is automatically entered.
Extension	This is the calculated value of the quantity multiplied by the amount and then with the discount subtracted.
- Check Box	Click the box in this column to make this value negative. You can use this when handling refunds and exchanges.

Second Choice

If there is a second choice for the item, enter the product code for it in the Second Choice field. You can also search for products by clicking the Search button (...) just as you would in the rest of the product grid. The description will be entered in the field to the right of the Second Choice field. You can also just enter a description and leave out the product code, or enter additional description information in the description field.

Typically, Second Choice is only used for wire out orders. However, if a second choice is entered for a local order, the second choice will print on the worksheet.

Picture Button

After you have entered an order, you can look it up again and attach (or view attached) pictures. If the Picture button has a camera icon on it, the order has a picture attached. For more information, see [Working with Recipient Pictures](#) on page 9-55.

Delivery

The Delivery section contains delivery information for the order. You can quickly access this section by pressing F6 on your keyboard.

Table 9-4: Delivery Area Fields

Field	Description
Date	Enter the delivery date. You can also click the arrow at the right of the field to display a calendar, from which you can pick the delivery date.
Zone	Select the zone for the order. If you have already set up your system to select zones based on addresses, the selection may have already been made once you entered recipient information. If you select a wire out zone, the Florist area will become enabled, as you are selecting to wire the order out the order over the Mercury Network or phone the order out. If the order is for later pickup, select a pickup zone. If the order is for carry out, select a carry out zone.
Time Detail	Enter the time at which you want the order to be delivered (such as after 2 P.M., morning, etc.). You can also choose from existing ones by clicking the arrow to display a list (items in the list correspond to Delivery Priority Codes in Mercury Administration).
Transfer To	If you are configured as a multistore environment, you can transfer the order to another of your stores by selecting the store from this list (as long as you have enabled Store Transfer in Mercury Administration). For accounting purposes, the order value will be allocated between the two stores based on values set in Mercury Administration. For more details, see Store Transfers Screen on page 24-22. The order will also be transferred to the other store for design and delivery purposes.

Delivery Confirmation Button

When you have selected a deliverable zone (that is, not a wire out, pickup, or carry out zone), if you want to send an email message confirming delivery once the order has been marked as delivered, click the Delivery Confirmation button. The Delivery Information window opens, and you can enter in information required for the delivery confirmation (this information is automatically populated for customers configured to receive delivery confirmations). For more information, see [Delivery Confirmation](#) on page 9-72.

Status Button

Click this button to view ticket status in the Ticket Status window. For more information, see [Ticket Status Window](#) on page 9–86.

Card

In the Card section, enter your card message. You can use an abbreviation code as a shortcut (for example, \hb for HAPPY BIRTHDAY!). See [Abbreviation Codes Screen](#) on page 24–65 for more details. Use the text and alignment buttons to format your message.

You can access the Card area by pressing F7 on your keyboard.

Click the **Add Recipients** button to send the same card to several recipients at the same address. As you add each name, a new line appears allowing you to add recipients.

If there is an occasion for this order, select it from the Occasion list. (This will already be selected if you use an abbreviation code where an occasion code has been defined.)

IMPORTANT If the card message is too large to print on an invoice, you will receive a warning message and be provided with an option to change the card message so it fits.

Florist

Fields in the Florist area are disabled if the Phoned In option is not selected or if the delivery zone is not a wire out zone. If this is a wire out order, you can enter florist information in the Florist area. You can quickly access the Florist area by pressing F9 on your keyboard.

From the wire service list, select the wire service you are using to wire out the order. If you want FTD Mercury to automatically select a florist that meets your criteria, click the Auto Select button. Otherwise, enter the florist code in the Filling Florist code field. If you click the Search button (...), the Florist Search window opens.

Once you select a filling florist (either manually or automatically), florist information is displayed below the florist code number. If the florist is not in the Florist Directory, enter the florist information in this field so it will display when you access the order.

Florist Contact

If this is a phoned order (in or out), enter the name of the person you spoke with in the Florist Contact field.

Table 9-5: Florist Area Options

Option	Description
Phoned Check Box	This box will display as Phoned In or Phoned Out depending on the type of order you are entering. Click the Phoned Out check box if you phoned out this order (after you select a wire out zone). Be sure to enter the person you talked with in the Florist Contact field. If you enter FTD as the customer, this box is automatically checked.
No Auto Forwarding Check Box	Select this check box if you do not want the order automatically forwarded if the selected florist cannot fill it. You can set the default value for this in the General screen in Mercury Administration.

IMPORTANT It is a best practice to leave this box unchecked so the order can be filled by another FTD florist if the selected florist cannot fill it (such as if they have suspended their FTD Mercury system).

Special Instructions

If you have any special instructions for the delivery driver (for example, “leave on back porch if not home”) type them in the **Special Instructions** text box.

Order Totals

The Order Totals area, located at the bottom right of the screen, displays running total information for the order you are entering. You can see the current subtotal, current taxes, and the current total for the order (including all tickets).

Button Ribbon

The button ribbon at the bottom of the window enables you to perform several tasks.

Table 9-6: Order Entry/Point of Sale Button Ribbon

Button Name	Button Color	Description
Payment	Dark Green	Enter payment information for this order. The Payments window will open.
Complete	Olive	Complete this order. If you have yet to enter payment information, the Payments window will open.
Update	Olive	Update this order if you have made changes to it after completing it.
C.O.D.	Light Green	Mark this order as Cash on Delivery (the customer will pay when it is picked up or delivered).
File	Lavender	File this order to complete later. IMPORTANT: This button is not enabled in Order Entry until you provide a customer.
Cancel Order	Red	Cancel the order.
Void Order	Red	Void the order (in Point of Sale). You will be required to enter your employee name and password, as only authorized users can void sales.
Printer	Pink	Open the Output Options window, where you can select the form(s) to print and the printer where the forms should be printed. You can also email or fax orders from this window. If the order is opened on a Point of Sale system, you can print a Point of Sale receipt for any order. IMPORTANT: If you select a printer from this window, invoices will be printed to the selected printer instead of the store default printer for invoices.
Lookup	Blue	Perform a Ticket Search. If you click this button, you will lose any information you have entered for the current order.
Escape	Rust	Closes the window.

Point of Sale Window

The Point of Sale window, accessible by clicking Point of Sale in the FTD Mercury Main Menu, is substantially the same as the Order Entry window; however, instead of having the Average Order by Occasion area, there are several Point of Sale–specific buttons.

Table 9-7: Point of Sale–Specific Buttons

Button	Description
Opening Balance	Allows you to set the opening balance for the session. This button is only available after you have performed a z-out transaction; it is replaced by the X-Out/Z-Out button when a session is open. For more information, see Setting the Opening Balance on page 11–3.
No Sale	Allows you to perform a no sale transaction. For more information, see Processing a No Sale Transaction on page 11–4.
Paid Out/In	Allows you to enter a paid in or paid out transaction. See Processing a Paid Out or Paid In Transaction on page 11–5 for more information.
Receive Payment	Allows you to receive payment on a house account. For more information, see Receiving Payments on House Accounts on page 18–2.
X-Out/Z-Out	Opens the Z-Out window and allows you to perform an X-Out or a Z-Out. See Processing a Z-Out Transaction on page 11–9 for more information.

Figure 9-4: Point of Sale Window

The screenshot shows the 'Point of Sale - New Sale' window. The interface includes the following elements:

- Store Name (F2):** Doc's Blooms
- Order Notes:** Empty text area
- Employee (F3):** Administrator
- Customer (F4):** Heather Smith
- Customer Address:** 123 N MAIN ST, PLYMOUTH, MI 48170-1235, 734-555-1212
- Ordered By:** Empty dropdown
- Account Information:** Store of Origin: Doc's Blooms, Total Balance Due: 0.00, Average Sale: 37.36, Last Year Sale Count: 0, Last Year Sale Total: 0.00, Year To Date Sale Count: 5, Year To Date Sale Total: 186.81, Last Purchase Date: 02/28/2008, Current Balance: 0.00
- Buttons:** X-Out Z-Out, No Sale, Paid Out/In, Receive Payment, Customer Notes, Customer Detail
- Recipient (F5):** Name, Company, Address, City, State, ZIP Code, Phone
- Delivery (F6):** Date: Thursday 3/27/2008, Time Detail, Zone: N/A, Transler To
- Card (F7):** Empty text area
- Florist (F9):** FTD, Amount: \$0.00, Florist Contact, Phoned In, No Auto Forwarding, Message Center
- Products (F8):**

Product Code	Qty	Description	Amount	Discount	Extension
FTD BH	1	The FTD Big Hug Bouquet	\$ 37.99	0%/\$0.00	\$ 37.99
	1		\$ 0.00	0%/\$0.00	\$ 0.00
- Order Totals:** Subtotal: 37.99, Sales Tax 1: 2.56, Sales Tax 2: 0.00, Total: 40.55

Additionally, the backgrounds on fields in Point of Sale are light green, as opposed to the Order Entry window, where they are light blue.

Navigating the Order Entry Window and Point of Sale Window

Many of the fields and buttons on both the **Order Entry** window and **Point of Sale** window can be accessed with keyboard commands. If you press the **ALT** key in Order Entry or Point of Sale, you will see that the keyboard commands are indicated by an underlined letter on the screen. To use the keyboard commands, hold down the **ALT** key, and press the letter key that corresponds with the field to which you want to go. (For Funeral Log, Facility Search, and Map It, the keyboard commands are not on the button but can be seen if you hover the mouse over the button. The shortcut for Funeral Log is **ALT+L**. The shortcut for Facility Search is **ALT+A**. The shortcut for Map It is **ALT+I**.)

You can also use the **TAB** key to move through the fields, and you can use the arrow keys to navigate in the product grid.

Title Bar

The title bar in the Order Entry and Point of Sale windows displays the Sale ID for the last order completed, filed, updated, or marked as C.O.D. Orders that were accessed but not changed do not display in the Order Entry or Point of Sale title bar. The title bar also shows the date and time the order was entered.

Hot Keys

Hot keys allow you to jump to a particular area of the screen, using a certain function key.

Table 9-8: Order Entry and Point of Sale Hot Keys

Hot Key	Function
F2	Store Name list
F3	Employee list
F4	Customer (focus is on the Customer field)
F5	Recipient (focus is on the Name field)
F6	Delivery (focus is on the Zone list)
F7	Card (focus is on the Card Message field)
F8	Products area
F9	Florist (focus is on the Wire Service list)

Entering Orders

On the most basic level, when you enter orders into FTD Mercury, you are collecting the following information:

- » Customer information (who sent the order)
- » Recipient information (who the order is going to)
- » Delivery information (local delivery vs. pickup vs. wire/phone out, when it should be delivered)
- » Product information (the products included in the order)
- » Card information (what the card is going to say and how it is going to look)
- » Filling florist information (for wire/phoned-out orders)

» Payment information

The exact information required is dictated by the order type (carry out, local delivery, wire out, etc.) and how the order is being placed (by another florist, via a Web site, by a customer in your shop, or someone phoning in the order).

IMPORTANT Whenever possible, you should use Point of Sale as your order entry tool. This ensures if the customer wants to pay by cash, you have access to the cash drawer. Processing orders through Point of Sale is always preferable over Order Entry if the customer is in the store.

See the following sections for several different scenarios involving order entry and receiving orders:

- » [Entering Carry Out Orders](#)
- » [Entering Orders for Pickup](#)
- » [Entering Orders for Local Delivery](#)
- » [Entering Wire Out Orders](#)
- » [Entering Phoned-Out Orders](#)

Order Entry Anatomy

Most orders you enter follow a specific order entry pattern. Whether you perform each step depends on the order type.

- 1 **Employee/store information.** Depending on how your system is configured, you may have to select your employee name each time you enter an order. If you are in a multi-store environment, the Store list defaults to the store you are currently logged in to, but you can change this if necessary (press F2 as a shortcut to the list). The Employee list is at the top right of the Order Entry and Point of Sale window; the Store Name list is at the top left.
- 2 **Customer information.** Either enter an existing customer or a new customer. Existing customers have information autopopulated in the Customer area. If a customer does not exist, you have the opportunity to create the customer.
Additionally, for some customers, you can select the person who ordered it. This is for the case where a customer may be a company and you want to specify the person at the company who placed the order.
- 3 **Recipient information.** Enter information about the order recipient, including their name, company name (if applicable), address, and phone number. If the recipient is in a hospital or nursing home, you can click the Facilities button to locate the facility's address. You can also use the Funeral Log button to access any funerals you have entered into FTD Mercury.
- 4 **Delivery information.** Enter delivery information, including the date, time, and delivery zone. If you have configured your system to handle delivery zone charges, when you select a zone, the delivery fee assigned to the zone will be included in the product grid. If you have configured your system to assign relay fees to outgoing orders, these fees will be added automatically when you send a wire out order. You can also use this area to transfer an order to a different store (if you are in a multi-store environment).
- 5 **Card information.** Enter the card message. You can also send a card to multiple recipients. You also select the occasion for the order in this area.
- 6 **Product information.** The product grid allows you to enter information about the product or products the customer is ordering. Each row represents a single product. You can use product codes to quickly enter products that are already in your product database.
- 7 **Florist information.** If the order is a wire out or phoned-out order, you can select the wire service and filling florist information in this section.

- 8 Payment.** Once you have entered all pertinent information, you need to collect payment information (or, if this will be paid for when delivered or picked up, mark the order for COD). Either click Payment to enter payment information, or click COD.

TIP When an order for delivery does not contain a recipient phone number, or the order has a blank card, you can complete the order without providing the missing information. You are warned, however, and asked if you want to complete the order without the information. If you want to enter the missing information, FTD Mercury automatically places the cursor in the field with missing (but optional) information.

Filling Out the Order Entry or Point of Sale Window

During day-to-day order taking, you spend a lot of time using the Order Entry and/or Point of Sale window. All order types require you to enter information; the information you need to enter depends on the order type. If you have a basic understanding of what to do in each area of these windows, you can easily handle any order type in an efficient manner.

Filling Out the Header Area

TASK To fill in the header area:

- 1 In Order Entry, if you are in a multi-store environment, select the store for the order from the Store Name list. In Point of Sale, you cannot change the store name.
- 2 From the Employee list, select your employee name.

Filling Out the Customer Area

TASK To fill in the Customer area:

- 1 In the Customer field, enter the customer name, phone number, or credit card number. If you need to perform a Customer Search, click the Search button (...), search for the customer, and click Select. When you return to Order Entry or Point of Sale, the Customer field is already filled in.
- 2 By default, billing address from the Customer's information is already displayed. However, if you need to specify an address only for this order, click Invoice Only and enter the address.

IMPORTANT Customer accounts which are marked as inactive cannot be used in Order Entry or Point of Sale. You will receive a message informing you the account is inactive.

Filling Out the Recipient Area

TASK To fill in the Recipient area:

- 1 In the Name field, enter the recipient's name. Alternatively, you can click the arrow at the right of the field to display a list of any recipients to whom this customer has previously sent orders. If you find the recipient you are looking for, select them. Information will automatically fill into the remaining Recipient area fields. If everything is correct, you can move on to filling in Delivery information.

TIP You can use abbreviation codes to fill in the recipient area. Additionally, if you enter **Same**, the customer will be used as the recipient.

- 2 If the order is for a funeral already entered in Funeral Log, click the Funeral Log button and select the funeral. When you return to Order Entry/Point of Sale, the rest of the recipient information is already filled in.

- 3 If the order is going to a facility (for example, hospital or nursing home), click the Facility Search button to locate the facility. When you return to Order Entry/Point of Sale, the rest of the recipient information is already filled in.
- 4 In the Company field, enter the recipient's company (if this is going to a business).
- 5 In the Address field, enter the recipient's street address.
- 6 In the City field, enter the recipient's city.
- 7 From the State list, select the recipient's state or province.
- 8 In the ZIP Code field, enter the recipient's ZIP/postal code.
- 9 In the Phone field, enter the recipient's phone number.

Filling Out the Delivery Area

TASK

To fill in the Delivery area:

- 1 In the Date field, enter the date for the delivery. You can also click the arrow button a the right of the field to display a calendar, from which you can select the delivery date.
- 2 From the Time Detail field, enter or select the time detail for the order.
- 3 From the Zone field, select the zone for delivery. Depending on your system configuration, this may already be filled in based on the recipient's address.
- 4 If you are in a multi-store environment and another store is going to fill this order, select the store from the Transfer To list.
- 5 If the customer wants email delivery confirmation, click the Delivery Confirmation button and enter the appropriate information.

Filling Out the Card Area

TASK

To fill in the Card area:

- 1 In the Card field, enter the card message. Use the formatting buttons to change the font and alignment.
- 2 If there are going to be multiple, identical cards for this order, click the Add Recipients button and provide additional recipients. Additional cards with different recipient names will print.
- 3 From the Occasion list, select the occasion for the order.

Filling Out the Florist Area

The Florist Area is enabled if you are wiring out an order, phoning out an order, or have received a phoned-in order from another florist.

Wire Out Orders

TASK

To fill out the Florist area for Wire Out orders:

- 1 From the Wire Service list, select the wire service for the florist to whom you are sending the order. Typically, this is FTD.
- 2 You can enter the florist's shop code (if you know it) in the Wire Code field. You can also click the Search button (...) to perform a Florist Search, or click the Auto Select button to let FTD Mercury automatically select a florist for you. Information about the florist appears below the wire code field if you select an FTD florist.
- 3 If you do not want this order automatically forwarded if the filling florist is unavailable, select the No Auto Forwarding check box. (In the overwhelming majority of cases, you should not select this check box.)
- 4 Ensure the Phoned Out check box is cleared.

Phoned-Out Orders

To fill out this area for phoned-out orders, you must have a wire out zone selected.

TASK To fill out the Florist area for phoned-out orders:

- 1 Select the Phoned Out check box.
- 2 From the Wire Service list, select the wire service you are using for the phoned-out message.
- 3 In the Wire Code field, enter the shop code of the florist you are calling. If it is an FTD wire code, information about the florist will appear in the field below the Wire Code field.
- 4 In the Florist Contact field, enter the name of the person you talked with at the filling florist's shop.
- 5 The Amount field is automatically populated by the product amount and delivery fees on the order. If you are a Canadian shop and sending U.S. dollars, select the US check box.

Phoned-In Orders

To fill out this area for phoned-in orders, you cannot have a wire out zone selected.

TASK To fill out the Florist area for phoned-in orders:

- 1 Select the Phoned In check box. The Florist area is not enabled until either you select this option or use FTD as the customer.
- 2 From the Wire Service list, select the florist's wire service.
- 3 In the Wire Code field, enter the phoning florist's wire code. If it is an FTD wire code, information about the florist will appear in the field below the Wire Code field. If the florist is not listed in the FTD Directory, you can enter florist contact information in this field.
- 4 In the Florist Contact field, enter the name of the person you talked with at the phoning florist's shop.
- 5 In the Amount field, either enter the amount the phoning florist is providing you, or enter the amount from the product grid once you have entered product information. If you are a Canadian shop, select the US check box if the funds are in U.S. dollars. If the funds are in Canadian dollars, ensure the US check box is cleared.

Filling Out the Product Area

TASK To fill out the Product area:

- 1 In the Product Code column, enter the product code for the product. You can also scan the bar code for the product (if you have configured bar codes for that product). Alternatively, click the Search button (...) to open the Product Search window and search for products. By default, if you perform a Product Search from Order Entry or Point of Sale, Quick Picks are displayed.
- 2 In the Qty column, enter the number of this product that the customer is purchasing.
- 3 Depending on the customer and product configuration, the Amount and Discount columns may automatically populate. If they do not, or if you need to make changes, enter the correct values for the product amount and discount now. The Extension column (product subtotal) will automatically calculate based on the quantity, price, and discount on the product.
- 4 Repeat for any additional products.
- 5 If there is a second choice (typically used in Wire Out orders), enter the product code for it in the Second Choice field or enter a description of acceptable substitutions that can be used when filling the order. You can also click the Search button (...) to perform a Product Search.

Entering Carry Out Orders

Although you can enter carry out orders in both Order Entry and Point of Sale, FTD strongly recommends entering all carry out orders in Point of Sale so you have access to the receipt printer and cash drawer.

Entering Carry Out Orders in Point of Sale

TASK To enter a carry out order in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the **Customer** area, enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.

NOTE

In Point of Sale, you can leave the Customer field empty to use the default Point of Sale customer (usually Cash Sales).

- 4 Ensure you have selected a delivery zone (even if the zone is **N/A**).
- 5 In the **Product** area, enter product information. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 6 If there is a card message, enter it in the **Card** area. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 7 From the **Occasion** list, select the occasion for the purchase.
- 8 Click **Complete**. The **Payments** window opens.
- 9 From the **Referral Code** list, select the marketing method that generated this order (if any).
- 10 In the **Payments** area, enter payment information. For more information, see [Taking Order Payments](#) on page 9-30.
- 11 Click **Complete** to complete the sale, or click **Save** to save payment information and return to the **Point of Sale** window. Once the sale is complete the customer receipt prints out. If your system is set up to process credit card transactions and the payment used a credit card, or if the payment is on a house account, two additional receipts print with signature lines. The customer should sign the store copy and keep the customer copy.
Invoices, such as the billing invoice and worksheet, will print according to settings in Mercury Administration.

IMPORTANT

If the payment was on a credit card and the credit card was declined, neither the invoice nor the receipt will print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment information.

Entering Orders for Pickup

Pickup orders are typically phoned in by customers themselves. If you select a pickup delivery zone, FTD Mercury does not require you to enter the customer's or recipient's address or phone number prior to completing or filing the order. All filed orders, regardless of their delivery zone, use Cash Sales as the default customer if no customer has been selected.

TASK To enter an order for pickup:

- 1 On the **FTD Mercury Main Menu**, either click **Order Entry** or **Point of Sale**.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store (only in Order Entry).
- 3 From the **Employee** list, select your employee name.
- 4 In the **Customer** area, fill in customer information. (For more information, see [Filling Out the Customer Area](#) on page 9-14.)
- 5 In the **Delivery** area, fill out the information, making sure you select a pickup delivery zone. (For more information, see [Filling Out the Delivery Area](#) on page 9-15.)
- 6 Fill out the **Card** area. (For more information, see [Filling Out the Card Area](#) on page 9-15.)
- 7 From the **Occasion** list, select the occasion for this order.

- 8 In the **Products** area, enter product information. (For more information, see [Filling Out the Product Area](#) on page 9–16.)
- 9 If there are any additional instructions for the order, enter them in the **Special Instructions** field.
- 10 Click **COD**. The order is marked in FTD Mercury as a C.O.D. order, which you can later locate using **Ticket Search**.

IMPORTANT If the customer is making payment at the time they are placing the order for pickup (that is, they are using a credit card or gift card), do not click COD—click Payment instead and take the payment as you would for other orders. You can still look the order up in Ticket Search using the Pickup criteria.

Locating and Completing Pickup Orders

When the customer arrives to pick up the order, you need to locate the ticket. If you marked the order as C.O.D., you also need to collect payment for the order.

TASK To locate a pickup order and complete it:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**.
- 2 Click the **Lookup** button. The **Ticket Search** window opens.
- 3 Select the **Type** check box and select **Pickup** as the type.
- 4 Ensure all other parameters are cleared and click **Search**.
- 5 From the results list, double-click on the order the customer is picking up. The order opens in **Point of Sale**.
- 6 Click the **Payment** button. The **Payments** window opens.
- 7 If the order was not paid for (in the case of C.O.D. orders), the **Payments** window displays the amount due. Fill out the **Payments** window (for more information, see [Taking Order Payments](#) on page 9–30) and click **Complete**.

Entering Orders for Local Delivery

There are slight differences in entering orders for local delivery depending on whether you are using Point of Sale or Order Entry. Generally, if the customer is present, you should use Point of Sale.

Entering Orders for Local Delivery in Point of Sale

TASK To enter an order for local delivery in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9–14.
- 4 By default, billing address from the customer's information is already displayed. However, if you need to specify an address only for this order, click **Invoice Only** and enter the address.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). You can also use the **Funeral Log** or **Facility Search** buttons to enter information about a recipient at a funeral home or facility. For more information, see [Filling Out the Recipient Area](#) on page 9–14.
- 6 In the **Delivery** area, enter delivery information. For more information, see [Filling Out the Delivery Area](#) on page 9–15.

- 7 In the **Card** area, enter the card message or use abbreviation codes. If there are multiple recipients, click the **Add Recipients** button and add the other recipients. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 8 From the **Occasion** list, select the occasion for the order.
- 9 In the **Products** grid, enter product information. You can perform a **Product Search** by clicking the Search button (...). Make sure you enter the **Amount** and **Discount** (if any); the **Extension** (product subtotal) is updated automatically. If there is a second choice, enter it in the **Second Choice** field. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 10 If you have any additional instructions, enter them in the **Special Instructions** field.
- 11 Click **Payment**. The **Payments** window opens.
- 12 Enter payment information (see [Taking Order Payments](#) on page 9-30 for details) and click **Complete**.

Entering Orders for Local Delivery in Order Entry

TASK

To enter an order for local delivery in Order Entry:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 4 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 5 By default, billing address from the customer's information is already displayed. However, if you need to specify an address only for this order, click **Invoice Only** and enter the address.
- 6 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). You can also use the **Funeral Log** or **Facility Search** buttons to enter information about a recipient at a funeral home or facility. For more information, see [Filling Out the Recipient Area](#) on page 9-14.
- 7 In the **Delivery** area, enter delivery information. For more information, see [Filling Out the Delivery Area](#) on page 9-15.
- 8 In the **Card** area, enter the card message or use abbreviation codes. If there are multiple recipients, click the **Add Recipients** button and add the other recipients. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 9 From the **Occasion** list, select the occasion for the order.
- 10 In the **Products** grid, enter product information. You can perform a **Product Search** by clicking the Search button (...). Make sure you enter the **Amount** and **Discount** (if any); the **Extension** (product subtotal) is updated automatically. If there is a second choice, enter it in the **Second Choice** field. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 11 If you have any additional instructions, enter them in the **Special Instructions** field.
- 12 Click **Payment**. The **Payments** window opens.
- 13 Enter payment information (see [Taking Order Payments](#) on page 9-30 for details) and click **Complete**.

Entering Local Deliveries as C.O.D. Orders

Although this is a less common scenario, FTD Mercury also enables you to create a local delivery that is a C.O.D. order. It is substantially the same as entering any other local delivery, but instead of clicking Payment, you click C.O.D. to mark the order as C.O.D. in FTD Mercury. The billing invoice will indicate on the delivery slip that this is a C.O.D. order and instructs the driver to collect the order

amount when delivering the order (in cash or by check). When your driver returns to the shop, you need to look up the ticket to complete the order.

Completing C.O.D. Orders when the Driver Returns

TASK To complete a C.O.D. order when your driver returns with the collected money:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 Click **Lookup**. The **Ticket Search** window opens.
- 3 Enter today's date and select **Delivery Date**.
- 4 Select the **Order Type** parameter and select the **C.O.D.** parameter. Ensure all other search parameters are cleared.
- 5 Click **Search**.
- 6 From the results list, double-click on the order you need to complete. The ticket opens in **Point of Sale**.
- 7 Click **Payment**. The **Payments** window opens.
- 8 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9-30. Click **Complete**.

The sale is recorded, and the order will no longer be accessible if you search for C.O.D. orders in Ticket Search; it will, however, be available when you search for completed orders.

Entering Wire Out Orders

Entering Wire Out Orders in Point of Sale

TASK To enter a wire out order in **Point of Sale**:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 4 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). For more information, see [Filling Out the Recipient Area](#) on page 9-14.
- 5 In the **Delivery** area, enter delivery information. Ensure you select a wire out zone from the **Zone** list (this may be **Wire Out** or it may be a zone defined for outgoing wire orders). For more information, see [Filling Out the Delivery Area](#) on page 9-15.
- 6 In the **Card** area, enter the card message or use abbreviation codes. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 7 From the **Occasion** list, select the occasion for the order.
- 8 In the **Florist** area, enter the filling florist information. For more information, see [Filling Out the Florist Area](#) on page 9-15.
- 9 In the **Products** grid, enter product information. Make sure you also enter Second Choice details. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 10 If there are any additional instructions, enter them in the **Special Instructions** area.
- 11 Click **Complete**. The **Payments** window opens.
- 12 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9-30. When you are done, click **Complete**.

Entering Wire Out Orders in Order Entry

TASK To enter a wire out order in Order Entry:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 3 From the **Employee** list, select your employee name.
- 4 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). For more information, see [Filling Out the Recipient Area](#) on page 9-14.
- 6 In the **Delivery** area, enter delivery information. Ensure you select a wire out zone from the **Zone** list (this may be **Wire Out** or it may be a zone defined for outgoing wire orders). For more information, see [Filling Out the Delivery Area](#) on page 9-15.
- 7 In the **Card** area, enter the card message or use abbreviation codes. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 8 From the **Occasion** list, select the occasion for the order.
- 9 In the **Florist** area, enter the filling florist information. For more information, see [Filling Out the Florist Area](#) on page 9-15.
- 10 In the **Products** grid, enter product information. Make sure you also enter Second Choice details. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 11 If there are any additional instructions, enter them in the **Special Instructions** area.
- 12 Click **Complete**. The **Payments** window opens.
- 13 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9-30. When you are done, click **Complete**.

Entering Phoned-Out Orders

Entering Phoned-Out Orders in Point of Sale

TASK To enter a phoned-out order in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 4 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). For more information, see [Filling Out the Recipient Area](#) on page 9-14.
- 5 In the **Delivery** area, enter delivery information. Ensure you select a wire out zone from the **Zone** list (this may be **Wire Out** or it may be a zone defined for outgoing wire orders). For more information, see [Filling Out the Delivery Area](#) on page 9-15.
- 6 In the **Card** area, enter the card message or use abbreviation codes. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 7 From the **Occasion** list, select the occasion for the order.
- 8 In the **Florist** area, click the **Phoned Out** check box and enter the filling florist information. You should also enter the name of the person you spoke with in the **Florist Contact** field. For more information, see [Filling Out the Florist Area](#) on page 9-15.

- 9 In the **Products** grid, enter product information. Make sure you also enter Second Choice details. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 10 If there are any additional instructions, enter them in the **Special Instructions** area.
- 11 Click **Complete**. The **Payments** window opens.
- 12 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9-30. When you are done, click **Complete**.

Entering Phoned-Out Orders in Order Entry

TASK To enter a phoned-out order in Order Entry:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 4 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). For more information, see [Filling Out the Recipient Area](#) on page 9-14.
- 6 In the **Delivery** area, enter delivery information. Ensure you select a wire out zone from the **Zone** list (this may be **Wire Out** or it may be a zone defined for outgoing wire orders). For more information, see [Filling Out the Delivery Area](#) on page 9-15.
- 7 In the **Card** area, enter the card message or use abbreviation codes. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 8 From the **Occasion** list, select the occasion for the order.
- 9 In the **Florist** area, click the Phoned Out check box and enter the filling florist information. You should also enter the name of the person you spoke with in the **Florist Contact** field. For more information, see [Filling Out the Florist Area](#) on page 9-15.
- 10 In the **Products** grid, enter product information. Make sure you also enter Second Choice details. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 11 If there are any additional instructions, enter them in the **Special Instructions** area.
- 12 Click **Complete**. The **Payments** window opens.
- 13 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9-30. When you are done, click **Complete**.

Attaching Incoming Orders

Incoming wire orders are charged to the wire service house account. Each wire service customer house account helps you track your incoming wire orders for each wire service.

NOTE You may also access your incoming orders in Point of Sale.

When an incoming order is attached in Order Entry or Point of Sale (that is, opened from Message Center in Order Entry or Point of Sale), the system applies all fees associated with the recipient's delivery zone. So that the order amount is correct, the system reduces the product amount by the total fee amount. This eliminates the need to change the product amount manually to match the Mercury order amount.

The reduction of the product amount is calculated upon attaching the order. If adjustments are made after the order is attached (for example, you change the delivery zone and the delivery fee

increases), FTD Mercury automatically makes the adjustments. If you add or subtract to the order and change the dollar amount, you receive a warning message when you save the order:

The total of this ticket is not equal to the total sale amount of the Mercury Order. Do you want to save?

You can click **Yes** to continue with the new dollar amount, or click **No** to return to the order and make adjustments. For wire reconciliation purposes, it is recommended to maintain the original price of the order by making the appropriate adjustments (for example, if the delivery amount increased, decrease the product amount). You should only change the total amount of the order if you receive a price change message.

If an incoming Mercury message is attached in Order Entry or Point of Sale and the recipient address contained on the Mercury Message cannot be associated with a zone, the default delivery zone is assigned to the order (your default delivery zone is specified in the **Store Settings** screen in Mercury Administration). The fees associated with the default delivery zone are applied to the order and the product amount is recalculated accordingly.

For Canadian shops, when incoming Mercury orders are received from a U.S. florist, FTD Mercury uses the wire service exchange rate defined in Mercury Administration to convert the funds from U.S. dollars to Canadian dollars in Order Entry. Additionally, any florists listed in the CurrencySettings screen in Mercury Administration who have funds in U.S. dollars will also have their orders converted to Canadian dollars using the wire service exchange rate. If the order is from the United States, the order total will be reduced by the GST tax.

Attaching Incoming Orders from Quebec

If you are a florist in Quebec, and you attach an incoming order where FTD Mercury cannot ascertain the location of the sending florist, you will be asked if the sending florist is in Quebec. The appropriate taxes will be applied based on whether the sending florist is from Quebec.

Processing Incoming Wire Orders

TASK To process an incoming wire order:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 In the **Florist** area, click the **Message Center** button. **Message Center** opens.
- 3 The **Message Center** window automatically searches for all messages that require attention. Incoming orders fall into that category. Unattached messages appear in green text. In the results list, double-click on an incoming order. The order opens in **Order Entry**.
- 4 Make any changes necessary in **Order Entry**, such as selecting a different product code, setting the **Time Detail** for the delivery, or updating the card.
- 5 Click **Payment**. The **Payments** window opens. By default, the house account for the wire service is already selected for the payment.
- 6 Click **Complete**.

After you click Complete, invoices print based on your specifications in Mercury Administration. This may include one or more copies of a billing invoice, a worksheet, and/or a trifold card.

NOTE

Processing incoming Flowers All Hours (FAH) and Florists Online (FOL) is essentially the same as any other incoming order. However, these orders are unique in the following ways:

- » Customer accounts are selected automatically. When you open FAH or FOL orders from Message Center in Order Entry, the customer information is selected automatically instead of setting the customer to the FTD wire service account. If the customer does not exist in your database, you are prompted to add the new customer. The customer's credit card information from the Web order is populated automatically in the Payments window. If the customer put the order on a house account, the house account is selected.

- » Order information is found in order notes. The FAH/FOL order information is located in Order Notes, which you can see in the Order Entry window. Order Notes are not printed on the invoice and do not get transmitted over the Mercury Network if the order is sent as an outgoing order. The notes begin with “Incoming Flowers All Hours, Flowers Online order, or Web Order Interface Order,” followed by the Mercury number of the order.

Entering Phoned-In Orders

You can enter phoned-in orders from a wire service, so you may keep records of phoned in orders in your system. Performing this procedure with FTD orders builds the Rec Message List (see [REC Message List \(REC\)](#) on page 4–40) automatically, which should then be sent in at the end of each month. Entering phoned in orders from non-FTD wire services creates incoming orders with a status of “Phoned.”

Using the Order Entry window to enter incoming phone orders is an excellent way of recording orders so you can then print a “Report of Orders Filled” to send to the wire services of which you are a member, to receive credit for your orders.

There are two main scenarios for entering phoned-in orders:

- » [Entering Phoned-In Orders When You Know the Order Amount](#)
- » [Entering Phoned-In Orders Based on Products](#)

Entering Phoned-In Orders When You Know the Order Amount

TASK To enter a phoned-in order when you know how much money the sending florist is providing:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 3 From the **Employee** list, select your employee name.
- 4 In the **Florist** area:
 - a. Click the **Phoned In** check box.
 - b. From the **Wire Service** list, select the wire service of the phoning florist.
 - c. In the **Florist Code** field, enter the phoning florist’s shop code and press **TAB**. If the code is an FTD code, florist information will automatically populate, and the customer will be set to the FTD wire customer.

TIP You can also click the **Search** button (...) to perform a florist search for FTD florists. However, it is extremely likely the sending shop will provide you with their shop code.

- d. In the **Amount** field, enter the order amount provided to you by the sending florist. If you are set up as a Canadian shop, if the sending florist is in the United States, enter this value in U.S. dollars. If the sending florist is also in Canada, enter this value in Canadian dollars.
 - e. In the **Florist Contact** field, enter the name of the person you spoke with at the sending shop.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). (For more information, see [Filling Out the Recipient Area](#) on page 9–14.)
 - 6 In the **Delivery** area, enter delivery information. (For more information, see [Filling Out the Delivery Area](#) on page 9–15.)
 - 7 In the **Card** area, enter card information. (For more information, see [Filling Out the Card Area](#) on page 9–15.)
 - 8 From the **Occasion** list, select the occasion for this order.

- 9 In the **Product** area, a new item has been entered called wire with the value of the **Amount** field less any delivery fees or exchange rates. In the product grid, enter each product for the order. The total of all products should be the same as the value of the **Wire** product. (For more information, see [Filling Out the Product Area](#) on page 9–16.)
- 10 Enter second choice information (if there is any).
- 11 When the total of the products is the same as the **Wire** product, right-click on the **Wire** product and click **Remove**. (You can also change the product code on the Wire line and not have to remove it.)
- 12 Click **Complete**. The Payments window opens. The Wire Service house account is already selected as the customer with the house account as the payment type. From the Referral Code list, select the referral code, if any.
- 13 Click **Complete**.

Entering Phoned-In Orders Based on Products

TASK To enter a phoned-in order based on products the sending florist is ordering:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 3 From the **Employee** list, select your employee name.
- 4 In the **Florist** area:
 - a. Click the **Phoned In** check box.
 - b. From the **Wire Service** list, select the wire service of the phoning florist.
 - c. In the **Florist Code** field, enter the phoning florist's shop code and press **TAB**. If the code is an FTD code, florist information will automatically populate, and the customer will be set to the FTD wire customer.

TIP You can also click the **Search** button (...) to perform a florist search for FTD florists. However, it is extremely likely the sending shop will provide you with their shop code.

- d. In the **Florist Contact** field, enter the name of the person you spoke with at the sending shop.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). (For more information, see [Filling Out the Recipient Area](#) on page 9–14.)
- 6 In the **Delivery** area, enter delivery information. (For more information, see [Filling Out the Delivery Area](#) on page 9–15.)
- 7 In the **Card** area, enter card information. (For more information, see [Filling Out the Card Area](#) on page 9–15.)
- 8 From the **Occasion** list, select the occasion for this order.
- 9 In the **Products** area, enter the product(s) being ordered. Enter any second choice information as well. (For more information, see [Filling Out the Product Area](#) on page 9–16.)
- 10 The **Order Totals** area at the bottom right of the window shows the total for the order. Enter this amount in the **Amount** field in the **Florist** area.

NOTE If you are set up as a Canadian shop, if the sending florist is in the United States, the value of both the **OE Amount** field and the **Amount** field will be in U.S. dollars. FTD Mercury will display a U.S. indicator to inform you the funds are in U.S. dollars.

- 11 Click **Complete**. The **Payments** window opens.

- 12 In the **Payments** window, the wire service house account is already selected as the customer with the house account as the payment type. From the **Referral Code** list, select the marketing method (if any) that generated this order.
- 13 Click **Complete**.

Creating a Wire Out Order from an Incoming Florists Online or Flowers All Hours Order

You can create a wire out order from an incoming FOL/FAH message order. When you attach an incoming FOL/FAH order, the customer's account information is updated if the customer is in the database, and the credit card or house account information populates the payment window. The order then is considered a local delivery order. At this point you can change the delivery zone to a wire out zone, and enter the filling florist information. If the address entered is defined in a wire out map zone, this zone will automatically be populated.

If you send an FOL/FAH order to another florist, you lose the ability to view the incoming FOL/FAH wire order from Order Entry. To view the original FOL/FAH wire order information, click the **Order Notes** button in Order Entry. All of the information from the incoming order is copied into Order Notes.

TASK To create a wire out order from an incoming FOL or FAH order:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 3 From the **Employee** list, select your employee name.
- 4 Click **Message Center**. The **Message Center** opens.
- 5 Enter search criteria to locate the incoming message and click **Search**.
- 6 From the list of messages, double-click on the incoming FOL or FAH order. The order is attached and opens in **Order Entry**.
- 7 Fill out the order as you normally would, ensuring you change the delivery zone to **Wire Out** (or to a delivery zone of **Wire Out** type).
- 8 In the **Florist** area, enter the filling florist information. For more information, see [Filling Out the Florist Area](#) on page 9-15.
- 9 If there are any additional instructions, enter them in the **Special Instructions** area.
- 10 Click **Complete**. The **Payments** window opens. The credit card information from the customer should be populated for you. If the customer placed the order on a house account, the house account should already be selected. For more information, see [Taking Order Payments](#) on page 9-30.
- 11 Click **Complete**.

Order Entry Wire Product

When you enter an amount in the **Phoned In Order** window and the amount does not equal the amount currently in the product grid (including delivery charges and taxes) in **Order Entry**, an item called **Wire** is added to the product grid. Depending on whether the amount entered in the **Amount** field in the **Florist** area is more or less than the amount in the product grid, the **Wire** item will be positive or negative. You need to adjust the product amount(s) until you eliminate the difference caused by the **Wire** item. You can then remove the **Wire** item from the product grid and the amount from the **Amount** field in the **Florist** area will equal the amount in **Order Entry**, including delivery charges and applicable taxes.

If you have only one item in the phoned-in order, you can replace the product code of the **Wire** item with the correct product code for the item (for example, arr for Arrangement). The amount for the item should be the same as the amount of the **Wire** item.

Whenever possible, you should ensure the correct delivery zone is selected before changing the value of the **Wire** item (so that, if configured, FTD Mercury can automatically insert the delivery charge and reduce the product amount of the **Wire** item).

Figure 9-5: The Wire Item in the Order Entry Window

(-)	Product Code	Qty	Description	Amount	Discount	Extension
<input type="checkbox"/>	Wire	1	Wire	\$ 59.92	0%/\$0.00	\$ 59.92
<input type="checkbox"/>	DELIV	1	Delivery Charge	\$ 8.00	0%/\$0.00	\$ 8.00
<input type="checkbox"/>		1		\$ 0.00	0%/\$0.00	\$ 0.00

IMPORTANT If you change the **Amount** in the **Phoned In Order** window a second time, the **Wire** product will be updated (or will be created if the **Wire** product does not exist in the product grid).

Canadian Tax Calculations for Incoming Wire and Phone Orders

NOTE This section applies only to Canadian shops.

FTD Mercury is designed to handle the intricacies of applying the correct Canadian taxation rules for incoming wire and phone orders based on the tax codes you configured. For detailed instructions on how to configure your system as Canadian (if it was not set up initially as a Canadian system), refer to [Canadian Configurations](#) on page C-1. When your system is configured as described in that appendix, FTD Mercury processes taxes for incoming wire and phone orders as follows:

Table 9-9: Canadian Tax Application for Incoming Wire and Phone Orders

Sending Florist Location	Receiving Florist Location	Federal Tax Applied?	Provincial Tax Applied?
U.S.	Any Province Other Than Quebec	Yes	No
U.S.	Quebec	Yes	Yes
Any Province Other Than Quebec	The Same Province as the Sending Florist	No	No
Any Province Other Than Quebec	Quebec	No	Yes
Quebec	Quebec	No	Yes
Any Canadian Province	U.S.	No	No
Quebec	Any Province Other Than Quebec	No	No

FTD Mercury determines your store location from the **Province** list in the **Store Settings** screen of Mercury Administration. Ensure this value is correct, or all of your taxation rules will be incorrect.

Product Fill Values

When incoming orders are received from a florist outside of Canada, FTD Mercury automatically computes the fill value of the product based on the order total received in Canadian funds and the province conversion chart multiplier (set in the **WireServices** screen in FTD Administration). The order fill value is then reduced by the fees applied to arrive at the product fill value. Once this fill value has been computed, FTD Mercury appends it to the product description in Order Entry, and prints it on the invoice. However, the fill value does not print on the delivery slip or the delivery routing manifest.

Fill values are calculated for all orders received from outside of Canada, regardless of whether the order is received in Canadian funds. FTD Mercury determines whether the order is from out of country by reading the state/province field in the Florist Directory and from the **CurrencySettings** screen in Mercury Administration. If FTD Mercury cannot determine if the sending florist is from out of the country, it asks you if the florist is in Canada.

Filing Incomplete Orders

There may be times you need to file an order to complete later. Usually, this is because you need to move on to another order before you have all the information for the order you are currently viewing, need to free up the computer, etc. In any case, you need to stop working on an incomplete order, and intend to go back to it again in the future.

IMPORTANT You should not file orders for pickup; instead, select a pickup zone for orders that you have payment information for (via credit card or house account payment), or create a C.O.D. order for pickup orders that will be paid for when the customer picks up the order.

If you attempt to file an order which has both a customer and recipient, and the delivery zone is blank, you are prompted to enter a delivery zone prior to filing. If the order is missing either the customer or recipient, the delivery zone is automatically set to N/A.

IMPORTANT You cannot file an order in Order Entry if you have not entered a customer. The File button is disabled until that point.

When you file an order, an invoice will print with the word FILED.

TASK **To file an order:**

- 1 While in **Order Entry** or **Point of Sale**, click **File**.
- 2 When asked if you want to print an invoice, click **Yes** to print the invoice with as much information as you have already entered, or click **No** to continue without printing. The invoice will include the time the order was entered, and the word FILED.

NOTE Recipient information is saved only if you have specified a customer for the order.

Locating Filed Orders

TASK **To find an order you have filed:**

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. If you are in **Order Entry** or **Point of Sale**, click **Lookup**.
- 2 Select the **Order Status** check box and select **Filed** as the status.
- 3 Ensure all other check boxes are cleared and click **Search**.

- 4 In the results list, double-click on the ticket you want to open. **Order Entry** or **Point of Sale** opens (depending on where the order was originally entered).

Once you have located the ticket, you can continue working on it as you would any other ticket.

Deleting Previously Filed Orders

TASK To delete a previously filed order:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. If you are in **Order Entry** or **Point of Sale**, click **Lookup**.
- 2 Select the **Order Status** check box and select **Filed** as the status.
- 3 Ensure all other check boxes are cleared and click **Search**.
- 4 In the results list, double-click on the ticket you want to open. **Order Entry** or **Point of Sale** opens (depending on where the order was originally entered).
- 5 Click **Delete Order**.
- 6 Confirm that you want to delete the order.

C.O.D. Orders

In FTD Mercury, cash on delivery (C.O.D.) encompasses more than just a cash payment when something is delivered. Orders that require payment on delivery (either cash or check) or payment on pickup (by cash, check, or credit card) are designated as C.O.D. orders. The important point to remember is that payment was not provided at the time the order was placed, and you will need to collect it when the order is delivered or picked up.

C.O.D. orders are useful because some customers want to wait to pay you until the goods are ready. One good example is for prom-related items (corsages and boutonnieres). High school students may need to place the order several weeks or months ahead of time, but want to pay when they pick up the item closer to the prom. Another possibility is someone who orders an arrangement over the phone during the day and wants to pick it up at the end of the day and pay in cash. You want to accept the order, but want to make sure it gets paid for when the customer picks it up.

There is, of course, some risk in accepting C.O.D. orders: you do not have payment before you design and create (and possibly deliver) the order.

When to Use C.O.D. Orders

You should use C.O.D. for any local orders (delivery or pickup) where you do not receive payment prior to creating the order. If you get a customer's credit card number, accept their cash or check, or charge the order to a house account, do not use C.O.D.

IMPORTANT If an order has more than one ticket, you cannot use a C.O.D. order. You must create new orders for each additional ticket.

When creating C.O.D. orders, you must use a pickup or local delivery zone; if you select a wire out zone, the C.O.D. button is disabled.

See Also

[Entering Orders for Pickup on page 9-17](#)

[Entering Local Deliveries as C.O.D. Orders on page 9-19](#)

Taking Order Payments

After a customer has placed their order, you need to take their payment. Regardless of the order type, the process is the same.

In Point of Sale

TASK To take an order payment in Point of Sale:

- 1 With the order open in Point of Sale, click **Payment**. The **Payments** window opens.
- 2 From the **Referral Code** list, select the referral code for the order.
- 3 In the **Payments** grid, in the **Type** column, select the payment type.
 - » For credit card transactions:
 - a. Swipe the credit card, or in the **Account Number** column, enter the account or card number.
 - b. Fill in the **Exp Date** and **Name** columns.
 - c. Enter the amount you are tendering in the **Tendered** column.
 - » For cash, check, and gift certificate transactions:
 - a. In the **Tendered** column, enter the amount tendered.
 - b. For Canadian Point of Sale systems, select whether the payment currency is in U.S. or Canadian funds. If you select U.S. funds, the amount tendered will be converted to Canadian dollars using the local exchange rate in Mercury Administration and the indicator will change to Canadian funds.
 - c. If change is due to the customer, the **Change Due** field displays the amount of change due to the customer. Customers cannot receive cash back on credit card or house charge transactions.
 - » For gift card payments:
 - a. Swipe the gift card or enter the gift card number in the **Account** field.
 - b. If the card is active, a window opens displaying the balance and expiration date. Close this window.
 - c. If there is sufficient balance on the gift card for the payment, the row in the payment grid will display the full amount of the transaction in the **Gift Card** row. If there is not sufficient balance, the amount from the gift card will display in the **Tendered** column in the **Gift Card** row. You will need to add an additional payment for the transaction.
- 4 Click **Complete** to complete the sale, or click **Save** to save the payment information and return to the Point of Sale window. Once the sale is complete, a customer receipt prints out. If you are processing a credit card or a payment from a house account, two additional receipts print out with signature lines. The customer should sign the store copy and keep the other copy.

IMPORTANT If the credit card was declined, neither the invoice nor the receipt will print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment method.

You can also click Reprint Receipt to print another copy of the receipt, or click New Order to return to the Point of Sale window.

In Order Entry

- 1 With the order open in **Order Entry**, click **Payment**. The **Payments** window opens.
- 2 From the **Referral Code** list, select the referral code for the order.

- 3 In the **Payments** grid, in the **Type** column, select the payment type.
 - » For credit card transactions:
 - a. In the **Account Number** column, enter the account or card number.
 - b. Fill in the **Exp Date** and **Name** columns.
 - c. Enter the amount you are tendering in the **Amount** column.
 - d. Select the appropriate value from the **Cardholder Present** list.
 - » For gift card payments:
 - a. Enter the gift card number in the **Account** field.
 - b. If the card is active, a window opens displaying the balance and expiration date. Close this window.
 - c. If there is sufficient balance on the gift card for the payment, the row in the payment grid will display the full amount of the transaction in the **Gift Card** row. If there is not sufficient balance, the amount from the gift card will display in the **Amount** column in the **Gift Card** row. You will need to add an additional payment for the transaction.
- 4 Click **Complete** to complete the sale, or click **Save** to save the payment information and return to the **Order Entry** window.

IMPORTANT If the credit card was declined, the invoice will not print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment method.

Debit Card Payments

In both the United States and Canada, a payment type called Debit is available. For U.S. shops, FTD Mercury does not authorize debit cards, but you can use this payment type for externally authorized payments (through a debit authorization device). You can then enter the account/card number and the authorization number so these payments are tracked in reports.

For Canadian shops, if you are using Point of Sale and are licensed for debit cards, FTD Mercury does the processing. For more information, see [Debit Cards](#) on page D-1.

Because FTD Mercury does not attempt to authorize this payment type, you can also use it for other previously authorized or settled payments. These will also appear in the reports as debit type payments.

Redeeming Gift Certificates

TASK To redeem a gift certificate in **Order Entry** or **Point of Sale**:

- 1 Take the customer's order as normal.
- 2 On the **Payment** screen, tender the sale as usual. In the **Payment Type** list, select **Gift Certificate**.

Redeeming Coupons

When a customer presents a coupon for redemption, you handle it just like any other product in FTD Mercury. You can either enter the product code manually, or select the coupon by performing a product search. Additionally, if you are using Point of Sale, you can scan the bar code on the coupon (if present), as long as the coupon bar code was associated with the coupon when the coupon was created as a product.

IMPORTANT Coupons are automatically interpreted as a negative value in the **Point of Sale and Order Entry** windows; you do not need to select the (-) column to indicate a negative value.

Payments Window

The **Payments** window allows you to receive payment for an order. To access this window, click **Payment** or **Complete** in the **Order Entry** or **Point of Sale** window.

Figure 9-6: Payments Window

The screenshot shows the 'Payments' window with the following elements:

- Marketing** section: A large empty text area.
- Referral Code:** A dropdown menu.
- Payments** table:

Type	Account Number	Exp Date	Name	Approval	Amount
House	AAA				\$ 53.36
- Remove** button: A red button with the text 'Remove'.
- Cardholder Present:** A dropdown menu with 'No (phone order)' selected.
- Summary** section:

Sub. Total:	\$ 49.99
SalesTax1 :	\$ 3.37
SalesTax2:	\$ 0.00
Total:	\$ 53.36
Amount Paid:	\$ 0.00
Balance Due:	\$ 53.36
- Buttons:** 'Complete' (grey), 'Save' (green), and 'Escape' (yellow).

If you have configured user questions to ask in this payment window, these will be displayed in the **Marketing** section. From the **Referral Code** list, select the marketing method that generated this order (if any).

In the **Payments** area, provide information about this payment. Customers can use multiple payment types (for example, a gift certificate for part of the order and cash for the rest); enter each payment type on its own line. The columns here are:

Table 9-10: Payment Area Columns

Column	Description
Type	Select the payment type for this order.
Account Number	If you selected Credit Card as the payment type, in this field, enter the account or card number (you can also swipe the card).
Exp Date	Enter the expiration date for the credit card.
Name	Enter the name of the cardholder.
Approval	Once the credit card is sent for processing, the approval code appears in this field.
Amount	This column only appears in Order Entry. Enter the amount of the payment.

Table 9-10: Payment Area Columns (cont.)

Column	Description
Tendered	This column only appears for Point of Sale systems. Enter the amount of money tendered for this sale.
Exchng	This column is included for Canadian Point of Sale systems. Select whether the funds you are tendering are in Canadian or U.S. funds. If they are in U.S. funds, FTD Mercury will automatically convert them to Canadian funds using the local exchange rate defined in the Store Settings screen in Mercury Administration.

If a credit card is used for payment, from the **Cardholder Present** list, select whether the cardholder was present for the transaction, and if not, the circumstances if they were not present.

For Point of Sale transactions, the order total and change due appear in large type at the bottom of the screen.

When you click **Complete**, the events that happen depend on your FTD Mercury configuration, the payment type, whether the order was a wire out order, and whether you are using **Order Entry** or **Point of Sale**.

Order Entry

The following scenarios can occur when you click **Complete** in the **Payments** window when using Order Entry:

Table 9-11: Order Entry Payment Scenarios

Order Type	Payment Type	Description
Wire Out	Non-Credit Card, Non-Gift Card	FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer.
Wire Out	Credit Card	FTD Mercury sends out for credit authorization. You must wait for authorization. Once you receive authorization, FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer.
Wire Out	Gift Card	FTD Mercury checks for gift card balance. If there is sufficient balance, the transaction is authorized and FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer.
Non-Wire Out	Non-Credit Card, Non-Gift Card	If your system is configured to print an order entry invoice for the delivery zone, the invoice prints on your configured printer.
Non-Wire Out	Credit Card	FTD Mercury sends out for credit authorization. You must wait for authorization. Once you receive authorization, if your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the configured printer.
Non-Wire Out	Gift Card	FTD Mercury checks for gift card balance. If there is sufficient balance, if your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the configured printer.

Point of Sale

The following scenarios can occur when you click **Complete** in the **Payments** window when using Point of Sale:

Table 9-12: Point of Sale Payment Scenarios

Order Type	Payment Type	Description
Wire Out	Non-Credit Card, Non-House Account, and Non-Gift Card	FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer. Your receipt printer prints a customer copy of the receipt and a store copy of the receipt.
Wire Out	Gift Card	FTD Mercury checks for gift card balance. If there is sufficient balance, the transaction is authorized and FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer.
Wire Out	Credit Card	FTD Mercury sends out for credit authorization. You must wait for authorization. Once you receive authorization, FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer. If the credit card is declined, you are informed with an on-screen message. You can then enter a different credit card or an alternative form of payment.
Wire Out	House Account	Your receipt printer prints a customer copy of the receipt and a store copy of the receipt, plus a store copy of a signature receipt and a customer copy of a signature receipt.
Non-Wire Out	Non-Credit Card, Non-House Account, and Non-Gift Card	If your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the configured printer.
Non-Wire Out	Gift Card	FTD Mercury checks for gift card balance. If there is sufficient balance, the transaction is authorized. If your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the configured printer.
Non-Wire Out	Credit Card	FTD Mercury sends out for credit authorization. You must wait for authorization. Once you receive authorization, if your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the Mercury printer. If the credit card is declined, you are informed with an on-screen message. You can then enter a different credit card or an alternative form of payment.
Non-Wire Out	House Account	Your receipt printer prints a customer copy of the receipt and a store copy of the receipt, plus a store copy of a signature receipt and a customer copy of a signature receipt. If your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the Mercury printer.

Transferring Orders to Other Stores

If you are configured as a multi-store environment, you can transfer orders to other stores. You must have enabled the Store Transfer feature in Mercury Administration. (For more information, see [Store Transfers Screen](#) on page 24–22.)

When you transfer an order to another store, any invoices, worksheets, and cards print at the store to which you transferred the order on the configured printers for that store. For financial purposes, the payment amount is split between stores based on configurations in Mercury Administration.

TASK To transfer an order to another store:

- 1 Take the order as normal in the **Order Entry** or **Point of Sale** window.
- 2 In the **Delivery** area, select the store you want to transfer the order to from the **Transfer To** list.
- 3 Click **Payment**. The **Payments** window opens. Take the payment as you normally would (see [Taking Order Payments](#) on page 9–30). Click **Complete**.

Once the order is complete, invoices print at the store to which you transferred the order. If you took the order on a Point of Sale station, the appropriate receipts are printed.

Using Abbreviation Codes in Orders

You can use abbreviation codes in orders to allow you to quickly enter common information for recipients and card messages. For example, if you have a commonly entered card message (such as We Miss You So Much!), you can create an abbreviation code (such as **wmusm**) that will be replaced by the text in a card message. Additionally, you can tie occasions to card messages, automatically selecting the occasion from the Occasion list when you enter the abbreviation code for the card message.

You can also use abbreviation codes to fill in recipient information. This can be a tremendous timesaver if you have a commonly used recipient (such as a hospital or funeral home).\

TASK To use an abbreviation code for a card message:

- 1 In **Order Entry** or **Point of Sale**, in the **Card** area, enter the abbreviation code in the format `\code` (where code is your abbreviation code). For example, enter `\hb` (for Happy Birthday!).
- 2 Press the **TAB** key. The abbreviation code is automatically replaced with the value for the abbreviation code (for example, `\hb` is replaced with Happy Birthday!).

TASK To use an abbreviation code for a recipient address:

- 1 In **Order Entry** or **Point of Sale**, in the Recipient area, enter the abbreviation code in the Company Name, Address, City, ZIP Code, or Phone field. The code should be in the format in `\code` (where code is your abbreviation code).
- 2 Press the **TAB** key. The abbreviation code is replaced with the value for the address.

For more information, see [Abbreviation Codes Screen](#) on page 24–65.

Caller ID and Orders

As an add-on feature, FTD Mercury is capable of integrating with caller ID functionality. This allows you to see caller ID information on your FTD Mercury system, click OK, and automatically perform a customer lookup for the calling customer based on phone number. This can significantly increase your customer service level, as you can already have the customer information up in the Order Entry window prior to picking up the phone.

There are three main scenarios when using caller ID as pertains to customer lookup in FTD Mercury:

Table 9-13: Customer Lookup from Caller ID

Scenario	Result
Phone number only matches a single customer	The customer's name and information is automatically populated in the customer area.
Phone number matches multiple customers	The Customer Search window opens and displays all customers who match that phone number. Highlight the customer you want to use and click Select (usually, you have to do so after you answer the phone and verify the customer's name).
Phone number matches does not match a customer	The Customer Search window opens and you are informed that the customer was not found. You are then asked if you want to create a new customer (which will open the Customer Detail Information window).

For more information about signing up for Caller ID functionality in FTD Mercury, contact FTD Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com.

Gift Cards

Gift cards are plastic cards printed with your store information on which you store value for a customer or recipient. Gift cards have many benefits. For example, gift cards give your customers more flexibility when choosing a gift because a gift card allows the recipient to select their favorite products. Gift cards also keep business in your shop since they can only be redeemed in your store, or in your company's stores if you are a multi-store business (as long as your stores use the same credentials for processing credit cards over the Internet). Gift cards also offer you a convenient way to provide store credit as a promotion or when processing a return. For example, you could give any customer who comes in during October a free \$5.00 gift card. Finally, you can make gift cards available as an impulse purchase at the counter to help increase the total value of a sale.

Gift cards offer you another advertising channel since, at a minimum, gift cards contain your store's contact information. For an additional fee, you can have FTD customize the front of the gift card with your store or company artwork.

Although similar to a gift certificate, gift cards are more convenient for you to manage. For instance, gift cards are an FTD product (**Gift Card), so you do not need to add them in Product Entry. You can also track gift card use electronically.

TIP

For more information about the FTD Gift Card program, contact FTD Technology Sales at 1-800-767-3222, or email TechSales@FTDi.com.

Getting Ready to Sell and Redeem Gift Cards

The following are the setups that you must complete before using gift cards.

- » You must be licensed to participate in the FTD Gift Card program. When you sign up to participate in the FTD Gift Card program, you will receive a General message from FTD that enabled you to sell and redeem gift cards.
- » Gift card expiration and balances are checked over the Internet in the same way that credit cards are authorized. Before you can use gift cards, you must be set up to process credit cards over the Internet. If you are multi-store business and all your stores use the same credit card processing setups, gift cards purchased at any of your stores will be redeemable at all stores.

- » Gift cards can be sold and reloaded only in Point of Sale. You must have a valid Point of Sale license in order to sell and add value to gift cards.

By default, FTD gift cards do not expire. You can set a valid period (months until expiration) for FTD gift cards in Mercury Administration.

Gift Cards Sales & Redemption

In the Point of Sale window, you can sell a gift card or add value to a gift card. Gift card sales and reloads are not allowed in the Order Entry window.

NOTE Gift cards can be sold as part of local, pick up, pool, and carry out orders. However, gift cards cannot be sold when the order is a wire out order or when transferring the order to another store.

FTD Mercury X includes a new payment type for gift cards so that you can redeem FTD gift cards that have been activated in your store. You can accept gift cards as payments in the Order Entry and Point of Sale windows. When a customer presents a gift card as payment, you will scan it or enter the gift card number. The system will then verify that the card has been activated for your store and inform you of the value available on the card. After the card has been used for payment, any remaining value stays on the card (can't be given as change).

You can perform the following tasks using gift cards:

- » [Selling New Gift Cards](#)
- » [Adding Value to Gift Cards](#)
- » [Refunding the Purchase of a Gift Card](#)
- » [Accepting Gift Card Payments](#)
- » [Cancelling or Refunding Orders Paid for with Gift Cards](#)
- » [Copying an Order with a Gift Card Payment](#)
- » [Issuing Store Credit with Gift Cards](#)

Selling New Gift Cards

Selling gift cards is essentially the same as selling any other product in your FTD Mercury database, except that when you sell a gift card, you activate the gift card with the value of the purchase. The new gift card is valid from the date of the sale for the expiration period set in Mercury Administration.

TASK **To sell a gift card:**

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the Customer area, enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.

NOTE In Point of Sale, you can leave the Customer field empty to use the default Point of Sale customer (usually Cash Sales).

- 4 Ensure you have selected a delivery zone (even if the zone is **N/A**).
- 5 Fill in the **Products** area:
 - a. In the **Product Code** column, enter ****Gift Card**, or swipe the gift card being purchased. The **Description** field will show the number of the gift card.
 - b. In the **Amount** field, enter the value to be placed on the gift card. The sale price without extension is the value that will be on the gift card when it is activated.

- c. If you are offering a discount on the gift card, or giving it away free as a promotion, enter a percentage in the **Discount** field. For example, if you want to give customers free \$5.00 gift cards, enter \$5.00 in the **Amount** field and 100% in the **Discount** field.
- 6 From the **Occasion** list, select the occasion for the purchase.
- 7 Click **Complete**. The **Payments** window opens.
- 8 In the **Payments** area, enter payment information. For more information, see [Taking Order Payments](#) on page 9-30.

IMPORTANT You cannot use a gift card to pay for a gift card.

- 9 Click **Complete** to complete the sale, or click **Save** to save payment information and return to the **Point of Sale** window. Once the sale is complete the customer receipt prints out. If your system is set up to process credit card transactions and the payment used a credit card, or if the payment is on a house account, two additional receipts print with signature lines. The customer should sign the store copy and keep the customer copy.

Invoices, such as the billing invoice and worksheet, will print according to settings in Mercury Administration.

IMPORTANT If the payment was on a credit card and the credit card was declined, neither the invoice nor the receipt will print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment information.

Adding Value to Gift Cards

You can add value to unexpired gift cards. The reloaded gift card is valid from the date of the reload for the expiration period set in Mercury Administration.

TASK **To add value to a gift card:**

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 Swipe the gift card that you are reloading. The **Description** field (in the **Products** area) will show the number of the gift card. If the gift card is active, a message will pop up with the gift card balance and expiration date. When you see the message, click **OK**. If the gift card is expired, a message will pop up stating that the gift card is expired. You cannot add value to an expired gift card.
- 3 In the **Amount** field, enter the value to be placed on the gift card. The sale price without extension is the value that will be loaded on the gift card.
- 4 If you are offering a discount on the gift card, enter a percentage in the **Discount** field.
- 5 Click **Complete**. The **Payments** window opens.
- 6 In the **Payments** area, enter payment information. For more information, see [Taking Order Payments](#) on page 9-30.

IMPORTANT You cannot use a gift card to pay for a gift card.

- 7 Click **Complete** to complete the sale, or click **Save** to save payment information and return to the **Point of Sale** window. Once the sale is complete the customer receipt prints out. If your system is set up to process credit card transactions and the payment used a credit card, or if the payment is on a house account, two additional receipts print with signature lines. The customer should sign the store copy and keep the customer copy.

Invoices, such as the billing invoice and worksheet, will print according to settings in Mercury Administration.

IMPORTANT If the payment was on a credit card and the credit card was declined, neither the invoice nor the receipt will print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment information.

Refunding the Purchase of a Gift Card

You can issue a refund for the purchase of a gift card as long as the gift card has not expired and the balance on the gift card is equal to or greater than the value that was loaded on the gift card at the time of the purchase. When you refund the purchase of a gift card, the value that was refunded is removed from the gift card.

To refund the purchase of a gift card, you must cancel the order in the Point of Sale window. One-Click refunds are not available for orders in which gift cards were purchased.

Accepting Gift Card Payments

You can accept gift cards as payment for all types of orders in the Order Entry and Point of Sale windows. If a sale contains a gift card and another card type payment, such as a credit or debit card, the gift card will be processed first.

TASK To accept a gift card payment in the Order Entry window:

- 1 Fill out the order as you normally would. For more information, see [Entering Orders](#) on page 9–12.
- 2 When you are finished filling out the order, click **Complete**. The **Payments** window opens.
- 3 Swipe the gift card or click the arrow in the **Type** column and select Gift Card, then enter the gift card number. If the gift card is active, a message will pop up with the gift card balance and expiration date. If the gift card is expired, a message will pop up stating that the gift card is expired. You cannot redeem an expired gift card.

NOTE Gift cards can only be redeemed in the store in which they were purchased. Gift cards that have been activated in another store will appear as inactive in your store. (unless both stores use the same credentials for processing credit cards over the Internet).

- 4 Click **OK**. If the value on the gift card exceeds the Balance Due, when you click Complete, the balance due will be deducted from the value on the card. If the value on the card is less than the Amount Due, you will need to select another payment type to complete the payment. If you want to use less value from the gift card, you can enter a different amount for the gift card and enter an additional payment type.
- 5 Click **Complete**. When the system removes the value from the gift card, the Approval column will show that the gift card was approved. If the value deducted from the gift card was less than the value on the gift card, the remaining value will be retained on the gift card. If another card type payment, such as a credit or debit card, was used on the sale, and this payment type is not approved, no value will be deducted from the gift card. This is done in the event that the customer decides not to use the gift card.

For more information on taking payments, see [Taking Order Payments](#) on page 9–30.

TASK To accept a gift card payment in the Point of Sale window:

- 1 Fill out the order as you normally would. For more information, see [Entering Orders](#) on page 9–12.
- 2 When you are finished filling out the order, click **Complete**. The **Payments** window opens.
- 3 Swipe the gift card or click the arrow in the **Type** column and select Gift Card, then enter the gift card number. If the gift card is active, a message will pop up with the gift card balance and

expiration date. If the gift card is expired, a message will pop up stating that the gift card is expired. You cannot redeem an expired gift card.

NOTE

Gift cards can only be redeemed in the store in which they were purchased. Gift cards that have been activated in another store will appear as inactive in your store (unless your stores use the same credentials for processing credit cards over the Internet).

- 4 Click **OK**. The value on the card will be applied as the amount Tendered. If the value on the gift card exceeds the Amount Paid, when you click Complete, the Amount Paid will be deducted from the value on the card. If the value on the card is less than the Amount Paid, you will need to select another payment type to complete the payment. If you want to use less value from the gift card, you can enter a different amount for the gift card and enter an additional payment type.
- 5 Click **Complete**. When the system removes the value from the gift card, the Approval column will show that the gift card was approved. If the value deducted from the gift card was less than the value on the gift card, the remaining value will be retained on the gift card. If another card type payment, such as a credit or debit card, was used on the sale, and this payment type is not approved, no value will be deducted from the gift card. This is done in the event that the customer decides not to use the gift card.

For more information on taking payments, see [Taking Order Payments](#) on page 9-30.

Cancelling or Refunding Orders Paid for with Gift Cards

You can issue a refund for an order that was paid for in part or in full by a gift card. When an order is cancelled where payment was made with a gift card, the refund value is returned to the gift card as long as the gift card has not expired.

You can issue a refund in the Order Entry or Point of Sale windows using either One-Click refunds or by cancelling the order.

Copying an Order with a Gift Card Payment

You can copy an order that was paid for in part or in full with a gift card. When you copy the order, the gift card information becomes part of the payment for the new order. When you complete the new order, the system will check the gift card balance and redeem the gift card. You will not need to swipe the gift card.

Issuing Store Credit with Gift Cards

FTD gift cards allow you to issue credit for returns as value loaded on an active FTD gift card. FTD gift cards can be redeemed only in the store in which they are activated; therefore, putting refunds on a gift card increases the chance that the customer will return to your store. If a gift card was used for the purchase that you are refunding, you can easily return the value to the gift card. However, if the customer did not use a gift card for the original purchase, you can still place the refund value on a gift card by selling a new gift card for the value of the returned products.

IMPORTANT Refunding store credit on a gift card must be done in the Point of Sale window because you will need to activate the gift card in order to place the refund value on it.

TASK To place refund value on an FTD gift card using One-Click refunds:

- 1 In the Point of Sale window, click **Lookup**. The Ticket Search window opens.
- 2 Enter search criteria to locate the ticket you are refunding and click **Search**.
- 3 Right-click in the order you are refunding and select **Refund Sale**. The **Point of Sale** window will display with the product marked as a refund.

- 4 Swipe the gift card being used for the refund. The **Description** field will show the number of the gift card.
- 5 In the **Amount** field, enter the amount of the refund.
- 6 Click **Payment**. The **Refund** window will appear.
- 7 Click **Complete**. The refund value will be loaded on the gift card.

Gift Card Reporting

You can get information on your gift card sales and redemptions from the Gift Card Activity window, Mercury Accounting Balance Wizard, and from the following Business Reports.

- » Business Snapshot Report--Gift card payments appear in the Sales Analysis tab under the Sales Pay Method heading. For more information, see [Business Snapshot Report](#) on page 19-11.
- » Payment Type Totals Report--The number of gift card payments and the total amount of gift card payments appear to the right of Gift Certificates. For more information, see [Payment Type Totals Report](#) on page 19-33.
- » Sales Summary Report--The Gift Certificate/Card Summary sections in the Order Entry, Point of Sale and Total Sales sections contain details on gift card sales and redemptions for the reporting period. For more information, see [Sales Summary Report](#) on page 19-50.

Viewing Gift Card Activity

The Gift Card Activity window shows the gift cards that are active for your store.

TASK

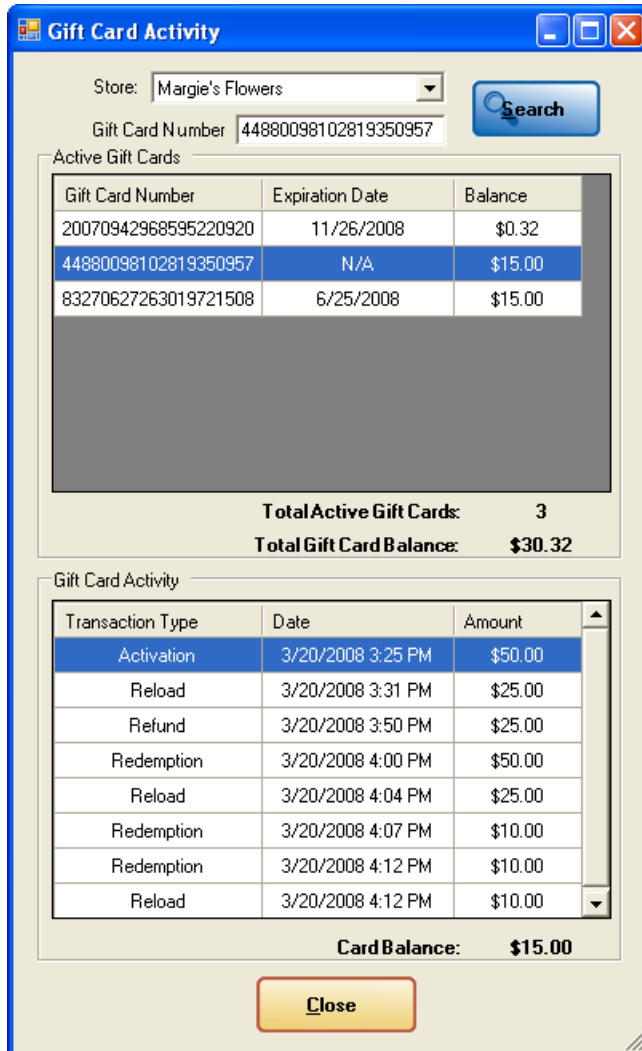
To view gift card activity:

- 1 On the FTD Mercury Main Menu, on the **Management** menu, click **Gift Card Activity**. The **Gift Card Activity** window opens.
- 2 If you have more than one store, select the correct store from the **Store** list.
- 3 In the **Active Gift Cards** area, highlight a gift card number, or enter a gift card number in the **Gift Card Number** field and click **Search**. The transactions for the gift card will appear in the Gift Card Activity area.

Gift Card Activity Window

The Gift Card Activity window allows you to view the gift cards that are active for your store and the transactions on each gift card. The Active Gift Cards area lists all gift cards sold in your store along with their expiration date and current balance. To view details on a particular gift card, select the gift card from the Active Gift Cards or enter the gift card number in the Gift Card Number field, then click Search. The Gift Card Activity area will list the transactions, including activation, loads, redemption, and refunds, completed for the selected gift card.

Figure 9-7: Gift Card Activity Window



Tickets

In FTD Mercury, you enter sales in Order Entry or Point of Sale. Each sale has a single customer, and contain one or more tickets (akin to jobs that must be performed for the sale). Each ticket has the common customer, but can otherwise be unique (that is, have different recipients, order types, delivery zones, delivery dates, and card messages). You should create a new ticket within a sale if one or more of the following is true:

- » There are different recipient addresses for items in the sale
- » The items in the sale need to go to a different delivery zone
- » The order is a different type (wire out, carry out, local delivery)
- » The order is for a different date
- » If you have multiple recipients and each card message is unique.

Within each ticket, you have one or more products (items). If you have multiple tickets, you may have identical items in each ticket. Because most orders have only one ticket, when you are searching for tickets, you are searching for orders. However, if more than one ticket exists for an order, you can limit the search to a particular ticket by using /1, /2, /3, etc., in the order number. If

you do not use the particular ticket number when searching for an order, all tickets are included in the results.

Ticket Search Window

In FTD Mercury, when you want to locate a ticket (or order), you use Ticket Search to do so.

Figure 9-8: The Ticket Search Window

Deliv Date	Delivery	Sale	Sale Date	Customer	Recipient/Ref	Sale Type	Pay Type	Total	Amt Paid	Design Status
02/27/2008		000011/1	02/27/2008	Heather Smith	Tom Jones	Local	Cash - OE	\$ 33.88	\$ 33.88	
02/27/2008		000010/1	02/27/2008	Heather Smith	Heather Smith	Carry Out	Cash - OE	\$ 40.68	\$ 40.68	

Ticket Search is accessible in several different ways:

- » On the FTD Mercury Main Menu, in the Search area, click Ticket. You can also use the keyboard shortcut (1).
- » On the FTD Mercury Main Menu menu bar, click the Search menu, and click Ticket Search.
- » In Order Entry or Point of Sale, click Lookup.

By default, when you open Ticket Search from the FTD Mercury Main Menu (either from the button or from the Search menu command), Ticket Search displays all tickets in your system by sale date for the current date and earlier. If you are in a multi-store environment, this default search uses the same store selection used the last time you performed a Ticket Search.

If you perform a Ticket Search from Order Entry or Point of Sale, it also by default displays all tickets in your system by sale date for the current date and earlier. However, in multi-store environments, it uses the selected store from Order Entry or Point of Sale.

Ticket Search Parameters

You must select at least one parameter to perform a ticket search. If you select more than one parameter, tickets must match all parameters to appear in the results list.

If you search by Order #, all other search parameters are automatically cleared. If you are using the order number, you will either find the ticket or not, so there is no need to search by other parameters in addition to the order number.

TIP You can also scan an invoice while in Ticket Search and the Order # field will automatically be selected and filled in with the numerical value from the bar code.

Table 9-14: Ticket Search Parameters

Parameter	Description
Store	Select the store to which you want to restrict the search. If you click Lookup from Order Entry or Point of Sale, the store associated with the order is automatically selected. You can also select --All Stores-- to include results from all stores.
Date	When using the Date parameter, you must select either Sale Date or Delivery Date. If you select Sale Date, all tickets prior to and including the date entered will be included in the results. If you select Delivery Date, all deliveries for the date you entered and forward are included.
Customer	<p>Use this parameter to search by:</p> <ul style="list-style-type: none"> » Customer name or customer sort name. If you enter in the first few letters of a customer's name or their sort name (from Customer Detail Information), the search will return any tickets with customers who have names or sort names which start with those letters. » Customer phone number (you must enter at least 7 digits). Results will include all phone numbers that match the phone number exactly (if you entered in a full phone number) or that begin with the numbers you entered (for partial matches). » Customer credit card (the credit card need not have been used on a ticket, but must be associated with the customer). <p>If you need to search for the customer by more specific criteria, click the Search button (...) to open the Customer Search window and search for the customer. Once you have located the customer in Customer Search, select the customer from the results list and click Select. You will be returned to Ticket Search with the customer's name filled into this field.</p>
Recipient	Use this parameter to search by recipient name, street address, or street name of the recipient. You can also enter the beginning of the information (for example, the beginning of a street name) and Ticket Search will return tickets that match.
Product Code	<p>Use this parameter to search by product code. If you want to search for a product code, click the Search button (...) to open the Product Search window. Once you have located the product, select it from the results list and click Select. You will be returned to Ticket Search with the product code filled into this field.</p> <p>You can also search for a range of codes by entering the first few letters. For example, if you want to search for all tickets that use product codes starting with FTD (FTD AB, FTD BH, FTD-SPA), just enter in FTD. All tickets with product codes that start with FTD will be included in the results.</p>
Zone	Use this parameter to search by active delivery zones. Select the zone you want to search from the list.

Table 9-14: Ticket Search Parameters (cont.)

Parameter	Description
Order #	<p>Use this parameter to search by sale number or ticket number. You can also scan the bar code of a ticket to enter the value.</p> <p>If you enter the Order # as SaleID/Ticket# (for example, 000342/2), your result will be the individual ticket for the sale. If you only enter the Sale ID (for example, 00342), your results will include all tickets for that sale.</p>
Type	<p>Use this parameter to search by order type. Select one of the following order types:</p> <ul style="list-style-type: none"> » C.O.D. » Pickup » Carry Out » Local » Pool » Wire Out » Payment » Credit Memo » Debit Memo
Order Status	<p>Use this parameter to search by order status. Select at least one of the following order statuses:</p> <ul style="list-style-type: none"> » Incomplete » Not Printed » Filed » Complete » Pending » Cancelled
Employee	<p>Use this parameter to search by employee. You also need to specify the function the employee performed (Clerk, Designer, or Driver), which can be different from their employee job function. For example, if someone has a job function of Designer, but enters the sale and selects her name from the Employee list in Order Entry or Point of Sale, that employee would show up under Clerk when searching for tickets using the Employee parameter.</p>
Production Status	<p>Use this parameter to search by production status. Select at least one of the following:</p> <ul style="list-style-type: none"> » Assigned » Not Assigned » Designed » Not Designed » Delivered » Not Delivered » Picture Not Sent (use this to locate all tickets that have a Design or Recipient picture associated with them but the picture has not been sent)

Results List

Once you have clicked Search, FTD Mercury searches the database for tickets that match your criteria and displays them in the results list.

Table 9-15: Results List Columns

Column	Description
Deliv Date	The delivery date for the ticket.
Delivery	The delivery status for the ticket.
Sale	The sale ID and ticket ID.
Sale Date	The date the sale was entered.
Customer	The customer who placed the order.
Recipient/Ref	The recipient name.
Sale Type	The sale type associated with the ticket.
Pay Type	The payment type, with OE appended for orders placed in Order Entry and POS appended to orders placed in Point of Sale.
Total	The total ticket amount.
Amt Paid	The amount allocated to the ticket total.
Design Status	The design status, which can be assigned (all products associated with the ticket have been assigned), designed (all products associated with the ticket have been marked designed), or blank (one or more products on the ticket have not been assigned or designed).

If there are more than 25 results matching your search parameters, the More button is enabled. When you click it, FTD Mercury loads the next 25 matches (while still displaying the first 25). If there are more than 50 matches, clicking More displays the next 25 (while still displaying the previous 50 matches), and so on.

TIP You can click on the column header in the results list to sort the results by that header.

When results are displayed in the Ticket Search window, the following color coding is used:

Table 9-16: Ticket Search Window Legend

Format	Description
Red Highlight	Tickets where a credit card had an error or was declined
Yellow Highlight	Cancelled tickets
Light Blue Highlight	Sales with associated refunds

Buttons

At the bottom of the window, there are several buttons in the button ribbon that allow you to perform some specific tasks in Ticket Search.

Table 9-17: Ticket Search Buttons

Button	Description
Select	(Only displayed when opening Ticket Search from Order Entry or Point of Sale) When you select the ticket from the results list and then click Select, you are returned to Order Entry or Point of Sale (depending on where you initiated the Ticket Search).
Print List	Prints the displayed list of results.
Output Invoice	Opens the Output Options window and allows you to print the invoice, form, and/or card for the selected ticket. You can also fax or email the invoice.
More	If there are more results than could be displayed in the results list at one time, click More to display additional results. As long as this button is enabled, there are more results to display in the results list.
Escape	Closes the Ticket Search window.

Searching for Tickets

TASK To search for a ticket:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. You can also open **Ticket Search** by clicking **Lookup** in **Order Entry** or **Point of Sale**.
- 2 Enter your search parameters and click **Search**. The results list displays a list of tickets that match your parameters.

TIP If you know an order contained more than one ticket, you can search for individual tickets by entering the ticket number in the format SaleID/Ticket# (for example, 000342/2 would search for the second ticket in sale number 000342). You can also just enter the Sale ID in the Order # field without the slash and ticket number and see all tickets that were created for the sale.

Printing Ticket Search Results

TASK To print Ticket Search results:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. You can also open **Ticket Search** by clicking **Lookup** in **Order Entry** or **Point of Sale**.
- 2 Enter your search parameters and click **Search**. The results list displays a list of tickets that match your parameters.
- 3 If the **More** button is enabled, click it until it is disabled (ensuring your results list has the complete set of results for your entered parameters).
- 4 Click **Print List**.

Printing Invoices from Ticket Search

You may need to print an invoice once you locate it in Ticket Search. You can easily do it from the Ticket Search window.

TASK To print an invoice from Ticket Search:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. Alternatively, you can click **Lookup** in **Order Entry** or **Point of Sale** to open the **Ticket Search** window.
- 2 Enter your search parameters to locate the ticket and click **Search**.
- 3 From the results list, select the ticket you want to output.
- 4 Click **Output Invoice**. The **Output Options** window opens.
- 5 In the **Print Output** area, ensure the **Print Invoice** check box is selected. (Likewise, ensure in the **Fax Output** and **Email Output** areas that the **Fax** and **Email** check boxes are cleared.)
- 6 In the **Print Output** area, ensure your **Store Name** is selected.
- 7 Ensure the selections for **Ticket**, **Form**, **Printer Name**, and **Printer Tray** are correct. The initial printer settings are based on the default settings for the store; individual forms can be printed to any printer/tray configured.

You can selectively print a single ticket from an order by selecting the ticket number from the **Ticket** field. If you select **ALL** for the **Ticket**, all tickets on the order will be printed. If you select **ALL** for the **Form**, all forms for that order type (as set in **Mercury Administration**) will print.
- 8 Click **Execute**.

TIP You can also fax and/or email invoices in the same way from Ticket Search by selecting the Fax Output and/or Email Output options in the Output Options window.

Opening Orders from Ticket Search

Once you locate a ticket in Ticket Search, you most likely want to open it up in Order Entry or Point of Sale. You may, for example, need to get additional information about the order, make changes to it, or cancel it. You can easily open up any ticket displaying in the Ticket Search results list.

TASK To open a ticket from Ticket Search:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. Alternatively, you can click **Lookup** in **Order Entry** or **Point of Sale** to open the **Ticket Search** window.
- 2 Enter your search parameters to locate the ticket and click **Search**.
- 3 Double-click the ticket from the results list. If you opened **Ticket Search** from **Order Entry** or **Point of Sale** initially, you can also click **Select** once you have selected the ticket from the results list. Either **Order Entry** or **Point of Sale** opens, depending on where the order was originally entered. You can then work with the ticket as necessary.

Copying Existing Tickets and Sales

FTD Mercury allows you to copy an existing ticket (or entire sale for an order with multiple tickets) from the Ticket Search window to create a new order. This enables you to quickly duplicate a sale, whether it be because you have the same customer placing another order where most of the information will be identical, or if you have a similar order where it would be easier to start from the existing order than from a blank order.

Copying an Entire Sale

You can copy an entire sale, regardless of whether it consists of a single ticket or multiple tickets.

TASK To copy an entire sale in Ticket Search and create a new order:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. Alternatively, you can click **Lookup** in **Order Entry** or **Point of Sale** to open the **Ticket Search** window.
- 2 Enter your search parameters to locate the ticket and click **Search**. Right-click on the ticket and select **Copy Sale**. The copied order opens as a new order in either **Order Entry** or **Point of Sale**. (If you performed the **Ticket Search** from the **FTD Mercury Main Menu** or by clicking **Lookup** in **Order Entry**, the new order will open in **Order Entry**. If you performed the **Ticket Search** by clicking **Lookup** in **Point of Sale**, the new order will open **Point of Sale**.) All tickets from the original sale are copied.
- 3 Modify the sale as necessary and complete the order as you normally would. If FTD Mercury is configured to require an employee name for each sale, you will have to select a name from the **Employee** list; the employee who entered the original sale will not be retained in the copied sale. Pay particular attention to the payment options in the Payments window to ensure they reflect the payment method(s) you want to use for the sale.

Copying an Individual Ticket

You can also copy an individual ticket from a multi-ticket sale and create a new sale from that ticket.

TASK To copy an existing ticket in Ticket Search to create a new order:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. Alternatively, you can click **Lookup** in **Order Entry** or **Point of Sale** to open the **Ticket Search** window.
- 2 Enter your search parameters to locate the ticket and click **Search**. Right-click on the ticket and select **Copy Ticket**. The copied ticket opens as a new order in either **Order Entry** or **Point of Sale**. (If you performed the **Ticket Search** from the **FTD Mercury Main Menu** or by clicking **Lookup** in **Order Entry**, the new ticket will open in **Order Entry**. If you performed the **Ticket Search** by clicking **Lookup** in **Point of Sale**, the new ticket will open **Point of Sale**.)
- 3 Modify the ticket as necessary and complete the order as you normally would. If FTD Mercury is configured to require an employee name for each sale, you will have to select a name from the **Employee** list; the employee who entered the original sale will not be retained in the copied sale.

NOTE If the original sale was paid for with multiple payment methods, you will need to select the payment method in the new sale.

You can also duplicate tickets within an order. For more information, see [Working with Tickets in Order Entry/Point of Sale](#) on page 9-49.

Working with Tickets in Order Entry/Point of Sale

Creating Tickets

You create a ticket when you create a new order in **Order Entry** or **Point of Sale**. The first ticket is part of the order automatically. You can then create additional tickets if the same customer is ordering items for a different recipient, different delivery date, different delivery mechanism, or with a different card message.

Adding Additional Tickets

You can easily add an additional ticket to a sale in both **Order Entry** and **Point of Sale**. This enables you to use the same customer, but have different recipient, card, or delivery information.

TASK **To add an additional ticket:**

In **Order Entry** or **Point of Sale**, right-click on the **Ticket #1** tab at the bottom of the window and select **New Ticket**. Another tab will appear at the bottom of the window for the new ticket.

NOTE You cannot have more than 50 individual tickets in a sale.

Duplicating Tickets

In both **Order Entry** and **Point of Sale**, you can duplicate a ticket within the sale. This is useful if you have identical (or nearly identical) orders being sent to different recipients from the same customer.

TASK **To duplicate a ticket:**

In **Order Entry** or **Point of Sale**, right-click on the tab for the ticket you want to duplicate and select **Copy Ticket**. Another tab will appear at the bottom of the window for the copied ticket. The ticket will have the same information in it as the copied ticket.

NOTE You cannot have more than 50 individual tickets in a sale.

Removing Individual Tickets from Sales

You can remove individual tickets from a multi-ticket order in both **Order Entry** and **Point of Sale**. However, you cannot remove a ticket once payment has been received on an order (unless the sale is paid by house charge).

IMPORTANT If you remove a ticket from a sale, the ticket is removed, not cancelled. There will be no record that the ticket you removed ever existed.

TASK **To remove a ticket from an order that contains multiple tickets:**

- 1 In **Order Entry** or **Point of Sale**, right-click on the tab for the ticket you want to delete and click **Remove Ticket**.
- 2 When asked to confirm you want to remove the ticket, click **Yes**.

Once you have removed a ticket, the payment amount is updated to reflect the new order amount.

Handling Funerals

The **Funeral Log** in **FTD Mercury** allows you to enter details about a funeral, such as the name of the recipient, funeral home, and viewing and service date and time. You can then use the funeral details to complete recipient information for orders related to the funeral. When you populate the recipient of an order from the **Funeral Log**, the order is associated with the funeral. You can then generate an acknowledgement report showing all orders associated with the recipient/funeral to provide to the funeral home or family of the recipient.

Using the **Funeral Log** speeds up **Order Entry** and **Point of Sale** for funeral orders because you can enter funeral information once and use it for multiple sales. Creating an **Acknowledgement List** using the **Funeral Log's** print function enhances your relationship with funeral directors by allowing you to provide them with a report of your deliveries to their facility for a specific funeral.

Opening the Funeral Log

You can open the **Funeral Log** by clicking the **Funeral Log** button in **Order Entry** or **Point of Sale** (or using **ALT+L** as the keyboard shortcut). Only entries for the current or future funeral date are displayed. If no recipient has been entered in **Order Entry** or **Point of Sale**, the list of funerals will contain funerals with viewing or service times for the current or future dates.

Funeral Log Window

The Funeral Log window allows you to search for funerals, select recipients to use in Order Entry or Point of Sale, add funerals, update funeral information, print acknowledgements, and remove funerals.

Figure 9-9: Funeral Log Window

The screenshot shows the Funeral Log window with the following components:

- Search Parameters:**
 - Recipient Name
 - Facility Name
 - Start Date (4 / 2 /2008)
 - City/State
 -
- Funeral List Table:**

Recipient Name	Facility Name	Address	City	State	Zip	Phone
- Details:**
 - Funeral:**
 - Viewing Date:
 - Viewing Time:
 - Service Date:
 - Service Time:
 - Notes:**
- Buttons:** Select, Add, Detail, Print, Remove, Escape

The Funeral Log window contains the following areas.

Search Parameters

You can look up funerals that have been added to Funeral Log by searching for the name of the recipient, the name of the funeral home, the start date of the funeral, or the city and state where the funeral home is located. If multiple parameters are entered, the list of funerals displayed will contain only the funerals that match all parameters. To sort the results, click on a column header in the funeral list.

For instance, if you want to search for all funerals held during a particular week at a specific funeral home, enter the date for the beginning of the week and the name of the facility.

Funeral List

When you add or retrieve funeral information, the name of the recipient, the funeral home name, address, city, state, ZIP code, and telephone are listed for each funeral. When the Funeral Log is opened from Order Entry or Point of Sale and the recipient field is blank, all entries in the Funeral Log are displayed in alphabetical order by the recipient name. If you have already entered a recipient in Order Entry or Point of Sale, the funeral for the recipient name will appear in the Funeral Log if the service has been entered. If the funeral has not been entered, you can add it.

Funeral Details

When you highlight a funeral in the Funeral List, any details on the funeral that were entered when the funeral was added will appear as read-only text in the Details area. If the funeral has not occurred, you can add or change the details by clicking the Detail button.

TIP You can add notes to a funeral even if the funeral has occurred in the past.

Buttons

The Funeral Log window allows you to perform the following actions.

Table 9-18: Funeral Log Window Buttons

Button	Action
Select	Highlight a row in the Funeral List and click Select (ALT+L) to fill in the recipient information in Order Entry or Point of Sale. You can also double-click on the row in the Funeral Information.
Add	Click Add (ALT+A) to open a blank Add Recipient window to enter and save a new funeral.
Detail	Highlight a funeral the Funeral List and click Detail (ALT+D) to open and update the funeral.
Print	Highlight a funeral and click Print (ALT+P) to generate the Acknowledgement List report for the funeral.
Remove	Highlight a row in the Funeral Information area and click Remove (ALT+R) to delete the funeral information. You can only remove a funeral if no orders have been associated with it.

Adding Funerals to Funeral Log

To use the Funeral Log, you must first add the funeral. You use the Add Recipient window to add the funeral.

TASK **To add a funeral to Funeral Log:**

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. The **Funeral Log** window opens.
- 2 Click **Add**. The **Add Recipient** window opens.
- 3 In the **Recipient Name** field, enter the name of the recipient. You must enter a recipient name.
- 4 In the **Funeral** area, enter the date and time for the viewing and the date and time for the service.
- 5 Enter funeral home information. You can either click the **Facility Search** button to locate the funeral home, or manually enter the funeral home information in the **Facility Name**, **Address**, **City**, **State**, **Postal Code**, and **Phone** fields. For more information, see [Facility Search](#) on page 5-13.
- 6 If there are any notes, add them to the **Notes** field.
- 7 Click **Save**.

Add Recipient Window

The Add Recipient window enables you to both add funerals to the Funeral Log as well as edit details about the funeral once you have added it.

Figure 9-10: Add Recipient Window

The window consists of the following fields:

Table 9-19: Add Recipient Window Fields

Field	Description
Recipient Name	Enter the name of the recipient.
Facility Name	Enter the facility for the funeral. You can also click the Facility Search button to select a facility, which will automatically populate the Address, City/State, Postal Code, and Phone fields.
Address	Enter the address of the facility. If you selected the facility using the Facility Search, this is already filled in for you.
City/State	Enter the facility's city and state/province. If you selected the facility using the Facility Search, this is already filled in for you.
Postal Code	Enter the facility's postal code. If you selected the facility using the Facility Search, this is already filled in for you.
Phone	Enter the facility's phone number. If you selected the facility using the Facility Search, this is already filled in for you.
Viewing Date	Enter the date for the viewing. You can also click the arrow at the right of the field to display a calendar.
Viewing Time	Enter the viewing time.
Service Date	Enter the date for the service. You can also click the arrow at the right of the field to display a calendar.
Service Time	Enter the service time.
Notes	If there are any additional notes, enter them in this field. You can add notes to a funeral if the funeral occurred in the past.

After entering or editing information, click Save to save your changes or Escape to discard them.

Using Funerals to Select Recipients

Once funerals have been added to the Funeral Log, you can use the Funeral Log to fill in the Recipient for new orders. When you create an order for a recipient who is listed in the Funeral Log, the order is associated with the funeral and will appear in the Acknowledgement List.

NOTE If you copy a ticket or sale that has a recipient selected using the Funeral Log, the new tickets will also be associated with the funeral, as long as you do not change the recipient name.

TASK To complete the Recipient information from the Funeral Log:

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. Current or future funerals will appear in the list of funerals.
- 2 From the list of funerals, click the recipient and click **Select**, or simply double-click on the recipient. The **Funeral Log** window will close and the recipient information will appear in the **Recipient** area of **Order Entry** or **Point of Sale**.

Changing Funeral Information

You can change any of the funeral information in the Funeral Log for funerals for which no orders have been placed. If orders have been placed for the funeral, only the notes for the funeral can be changed.

TASK To change funeral information:

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. The **Funeral Log** window opens.
- 2 Enter search criteria to locate the funeral. You can search using **Recipient Name**, **Facility Name**, **Start Date**, **City/State**, or some combination of search parameters. Click **Search**.
- 3 From the results list, select the funeral that you want to edit and click **Detail**. The **Add Recipient** window opens.
- 4 Make any changes as necessary and click **Save**.

Generating Acknowledgement List Reports

Using the Print button on the Funeral Log window, you can print an Acknowledgement List report to give to the funeral home or family of the recipient. The Acknowledgement List report will be formatted for printing on your store letterhead and includes the following information:

- » Date printed
- » Number of pages
- » Recipient Name
- » Sender Name (if the order was sent via a wire service or with a cash account, this is not printed)
- » Sender Address (if an invoice address is entered for the order, it will display as the sender's address)
- » Product description
- » Card message

TASK To print the Acknowledgement List:

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. The **Funeral Log** window opens.
- 2 Enter search criteria to locate the funeral. You can search using **Recipient Name**, **Facility Name**, **Start Date**, **City/State**, or some combination of search parameters. Click **Search**.
- 3 From the results list, select the funeral for which you want to generate the Acknowledgement List report and click **Print**.

Removing Funerals

You can delete funerals for which no orders have been placed. Funerals for which orders have been placed remain in the Funeral Log until the orders associated with the funeral have been purged by your system. Orders are purged automatically by the Mercury System based on the Months to Hold setting in Mercury Administration. For more information, see [General Screen](#) on page 24–58.

TASK To remove a funeral with no orders:

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. The **Funeral Log** window opens.
- 2 Enter search criteria to locate the funeral. You can search using **Recipient Name**, **Facility Name**, **Start Date**, **City/State**, or some combination of search parameters. Click **Search**.
- 3 From the results list, select the funeral you want to remove and click **Remove**.

Working with Recipient Pictures

Recipient pictures are pictures you attach to an order with the intent of sending them to the sending florist (in the case of wire orders), or to customers (in the case of local orders). The message to the sending florist or customer does not get sent until you actively decide to send it. Sending florists receive an ANS message with a URL to the picture; customers receive an email message with a link to the picture.

TIP You can use recipient pictures as both a customer satisfaction tool (allowing customers to see designs produced for their recipients) as well as a way to show the quality of your work to sending florists—which can ultimately drive more wire order business to you!

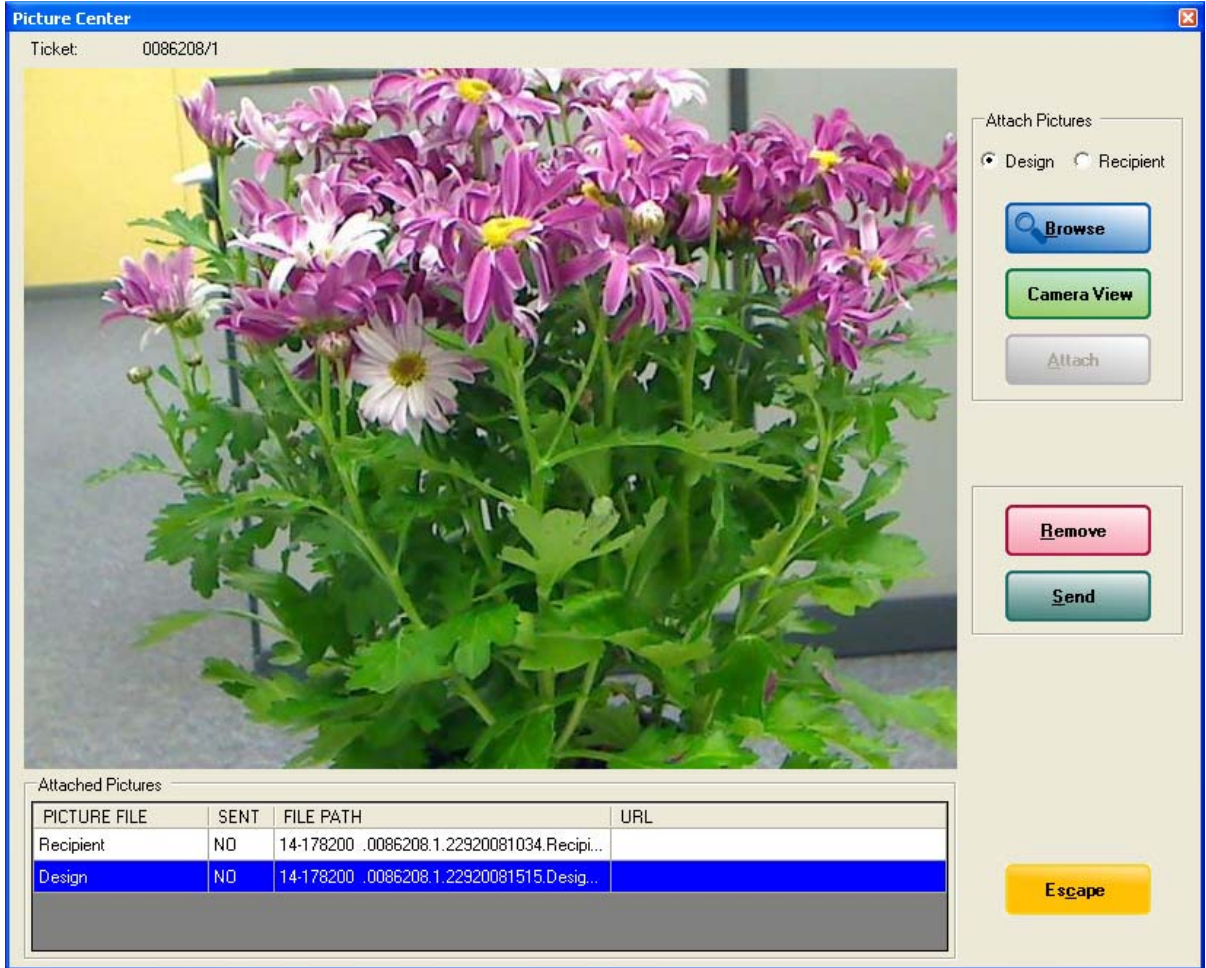
You can take pictures with the Logitech QuickCam attached to your Mercury system or with your own camera. If you take pictures with your own camera, you must upload them to your Mercury computer before using the Picture Center to attach and send the pictures.

Attached pictures must be JPEG format files. The system automatically sizes the pictures to 1024 pixels by 768 pixels. Sending recipient pictures requires that your Mercury system be always online and using MNAPI. The florist must also be assigned a CCAPI account ID and password.

Picture Center Window

The Picture Center window is the interface for selecting or taking pictures to attach to local products. You also use the Picture Center window to select or take pictures to attach to tickets and to send the pictures that are attached to tickets. When attaching a picture to a ticket, the Picture Center contains options for design and recipient pictures. You also use the Picture Center to view pictures attached to products or tickets. When viewing pictures in the Picture Center, some Picture Center controls may be disabled.

Figure 9-11: Picture Center Window when Attaching Pictures to Tickets



The Picture Center window contains the following areas.

Ticket or Product

The ticket number to which you are attaching pictures appears below the Picture Center window title bar. When the Picture Center window is opened from the Product Entry screen, the name of the product appears below the Picture Center window title bar.

Attach Pictures

Attach Pictures controls enable you to select a picture, take a picture, and attach a picture. If you are attaching a picture to a ticket, you can select whether to attach a design picture or a recipient picture.

Table 9-20: Attach Pictures Controls

Setting	Description
Design/Recipient	When attaching a picture to a ticket, select Design or Recipient to indicate the type of picture. The file name for the picture will contain Design or Recipient so that you can quickly identify the type of picture.
Browse	Use Browse to search for and select pictures saved on your computer. When you select a picture, it will appear in the image area of the Picture Center window.

Table 9-20: Attach Pictures Controls (cont.)

Setting	Description
Camera View / Take Picture	<p>Use Camera View to open the Logitech QuickCam menu. When you click Camera View and a camera is attached, the Camera View button will change to Take Picture, allowing you to take a picture.</p> <p>NOTE: You must have a camera installed to use Camera View. If you click Camera View without having a camera installed, you will receive an error message.</p> <p>Click Change Settings on the Logitech QuickCam tool bar to open the Webcam Settings dialog box where you can control the camera's zoom, pan, and tilt.</p> <p>When you click Take Picture, the picture appears in the image area, and the Logitech QuickCam menu closes.</p>
Attach	Use Attach to save the picture to the product or ticket. The Attached Pictures area of the Picture Center window shows the picture file name.

Attached Pictures

Attached Pictures shows information about the pictures attached to a product or ticket. For pictures attached to products, Attached Pictures shows the file name of the picture. For pictures attached to tickets, Attached Pictures also includes details about sending the picture.

Table 9-21: Attached Pictures Area

Field	Description
Picture File	For pictures attached to tickets, Picture File indicates if the picture is a Design or Recipient picture.
Sent	For pictures attached to tickets, Sent tells you whether the picture has been sent. Yes indicates that the picture has been sent. No indicates that the picture has not been sent.
File Path	<p>File Path shows the name of the file as stored by the Picture Center on your computer. The file path of pictures attached to products includes the product name and a system generated number. The file path of pictures attached to tickets includes the ticket number.</p> <p>Pictures are saved on your computer's C: drive in the FTD Album folder. Pictures attached to products are saved in a Products folder in the FTD Album folder.</p>
URL	For pictures attached to tickets that you have sent, URL shows the path to the picture on the FTD web server. You can click the URL to display the picture stored on the FTD web server.

Remove

Remove unattached the picture from the product or ticket to which it was attached. When you remove a picture, the image area of the Picture Center is blank. The picture file remains in the C: FTD Album folder on your computer. If the picture has been uploaded to the FTD web server, clicking Remove also removes it from the FTD web server.

Send

Send uploads the picture to the FTD web server and sends a Mercury ASK message or opens the Output Options window, depending on the type of ticket to which the picture is attached. When

sending is complete, the Sent field in the Attached Pictures area will show Yes, and the URL field will contain the path to the picture on the FTD web server.

Attaching Pictures to Tickets

You may want to attach a picture to a ticket. You can then send a link to the picture to the sending florist (for wire orders), or to the customer (for local orders).

Taking and Attaching Pictures to Tickets

FTD Mercury enables you to take pictures using a Logitech QuickCam Orbit AF camera. The Logitech QuickCam must be attached to your computer in order for you to take pictures from the Picture Center window. You can attach multiple pictures to a ticket.

TASK To take pictures with the Logitech QuickCam:

- 1 Perform a Ticket Search to locate the ticket.
- 2 From the results list, double-click the ticket to open it in Order Entry or Point of Sale.
- 3 Click Picture. The Picture Center window opens.
- 4 Click **Camera View**.
- 5 Select **Recipient**.
- 6 Place the product so that it is in view of the Logitech QuickCam.
- 7 If you want to change the camera settings, click **Change Settings** in the Logitech QuickCam tool bar.
- 8 Click **Take Picture**.
- 9 If you are satisfied with the picture and want to save it, click **Attach**. If you want to retake the picture, click Camera View again and retake the picture before you attach it.

If you are attaching pictures to a ticket, take as many additional pictures as you like. When you are finished, click Escape to close the Picture Center window.

Browsing and Attaching Pictures to Tickets

If you do not have a Logitech QuickCam Orbit AF camera, you can still attach pictures you have taken if they are on your computer. Pictures must be JPEG format files. The system automatically sizes the pictures to 1024 pixels by 768 pixels.

TASK To browse for pictures:

- 1 Perform a Ticket Search to locate the ticket.
- 2 From the results list, double-click the ticket to open it in Order Entry or Point of Sale.
- 3 Click Picture. The Picture Center window opens.
- 4 Click **Browse** and navigate to a picture already on your computer.
- 5 Click **Attach**.

When you are finished, click Escape to close the Picture Center window.

Sending Product Pictures

You can send pictures that you have attached to tickets. When you send a picture, the system uploads the picture to the FTD web server and acknowledges that a picture was sent. If the order is a local order, FTD Mercury opens the Output Options window for you to send the customer the link to the picture. For wire orders, if you are a filling florist, when you send a picture, FTD Mercury sends an ASK message to the sending florist with the URL for the picture.

TASK To send pictures:

- 1 Perform a Ticket Search to locate the order, and double-click it to open the order in Order Entry or Point of Sale.
- 2 Click **Picture**. The **Picture Center** window opens.

NOTE

If there are pictures attached to the ticket, the Picture button will include an icon of a picture. If it does not, there are no pictures currently attached to the ticket.

- 3 In the **Attached Pictures** area, select the picture to send.
- 4 Click **Send**. Depending on the type of order, the system does one of the following:
 - » For incoming wire orders over the Mercury Network, FTD Mercury sends an ASK message containing the URL for the picture.
 - » For local orders, the Output Options window opens. The sender will be the user who is logged in, and the customer and customer email address will be populated from the customer record, if available. Click Execute to send the customer a link to the picture.

Output Options Window

When you click Send in the Picture Center window for recipient pictures, the Output Options window opens if it is a local order.

Figure 9-12: Output Options Window

Email Output Area

The Email Output Area contains the following fields and options:

Table 9-22: Email Output Area Options and Fields

Option/Field	Description
Email	This box must be checked to send email.
Now/Later	Select Now to send the email now. Select later and specify the date and time if you do not want to send the message now.
Cover Letter	Select the cover letter to use for the message.

Table 9-22: Email Output Area Options and Fields (cont.)

Option/Field	Description
Customer Email Address	Enter the customer's email address. If the customer's email address is on file, this will be filled in automatically.
Carbon Copy	If desired, enter an email address you want to carbon copy for this message. For example, you may want to send it to your own email address.
Subject	The subject line for the email message

Email Information Area

The Email Information area contains the following fields:

Table 9-23: Email Information Area Fields

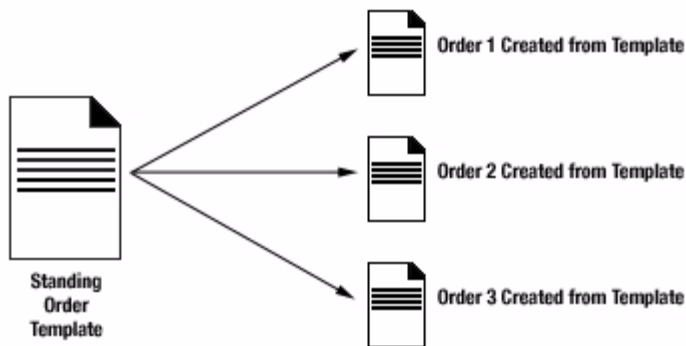
Field	Description
Customer	The name of the customer from the ticket.
Sender	The user on the FTD Mercury system who is sending the email message.
Job Description	The description that will be included in the Fax & Email Monitor.
Personal Message	Enter the text for the message. By default, this message includes the link to the image.

Standing Orders

Florists often receive orders from religious organizations and businesses that must be filled at regular intervals. Billing for these orders must also occur at regular intervals. To assist in this process, FTD Mercury allows these recurring, standing orders, to be created once as a standing order template. The contents of this template are used by FTD Mercury to automatically create the order at a predetermined interval, whether that be yearly, monthly, weekly, daily, or even on a custom schedule.

Standing order templates are not orders; they are used to create orders. Each template contains the customer information, recipient information, product information, delivery information, and the card message. This information is duplicated for each future recurring order in the series.

Figure 9-13: Relationship Between Standing Order Templates and Orders



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.

Creating Standing Order Templates

Prior to creating a standing order template, you must add the customer with whom the standing order template will be associated to your FTD Mercury database (see [Adding New Customers](#) on page 7-24), and that customer must have a house account (see [Setting Up House Accounts](#) on page 7-29). Once you have a customer set up in FTD Mercury, you can create the standing order template.

TASK To create a standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template will be associated.
- 2 In the **Customer Detail** window, click the **Standing Order** tab.
- 3 Click **New Standing Order**. The **Standing Order Scheduler** window opens.
- 4 From the **Start Date** and **End Date** lists, select the start and end date for standing orders. The start date represents the first delivery date, and the end date represents the last possible date that an order will be created based on this template. By default, both of these dates are set to the current date.

NOTE You cannot select a start date prior to the current date.

- 5 Select the recurrence frequency (**Daily, Weekly, Monthly, or Yearly**). By default, this is set to **Weekly**.
- 6 Click **Generate**. The **Delivery Dates** list populates with the dates on which orders will be scheduled for delivery based on your selections, with the first delivery date the same as the Start Date. Review these dates and make changes as necessary.
 - » If there are dates in the list you do not want to include, select them and click **Remove**.
 - » If there are additional dates you want to add, select the date on the calendar and click **Add**. You can only add dates between the selected **Start Date** and **End Date**.
- 7 Select the day of the week on which the order will be created and printed (or transmitted if the order is for wire out). If the first order is scheduled for the next day, the order will be created and printed/transmitted overnight for that order only. (For more details on the number of days ahead of the order the invoice will print, see [Lead Time](#) on page 7-23).
- 8 Click **Save**. The scheduling details are saved.
- 9 Click **Next**. The **Order Entry** window opens, allowing you to enter the product(s) in the order, as well as delivery information. Although the Order Entry window for standing order templates is identical to the standard Order Entry window, some functionality is disabled, and some information (such as **Customer Name**) is pre-populated.
 - » **Notes** for the order include the date and time the standing order was generated, as well as the standing order template that was used for order creation.
 - » The **New Ticket** button is disabled. You can only use a single ticket for standing order templates.
 - » Customer search is disabled; the customer will be the same as the customer with whom the standing order template is associated. You cannot add a new customer, nor can you view customer information.
 - » The **Delivery Date** defaults to the first delivery date as defined in the Standing Order Scheduler window and cannot be changed.

- » You can only use the **House** account payment type; credit card, cash, and debit payment types are disabled.
 - » Your delivery type can be **Wire, Pickup, Local, or Carry Out**.
 - » If you select a delivery zone that is not configured to print an invoice, you will receive a warning.
 - » The **Store Name** will be the name of the store you are currently logged in to and cannot be changed. However, you can use the Store Transfer list to transfer a standing order to another store.
- 10 If you selected a wire out delivery zone, enter florist information for the filling florist.
 - 11 Click **Complete**. The **Payment** window opens, displaying the amount for the order, including taxes and delivery fees.
 - 12 Click **Complete**. You are returned to the **Standing Order** tab in the **Customer Detail Information** window. The new standing order template will not appear in this window until you return to it at a later time.
 - 13 Click **Escape** to return to the **Main Menu**.

If you created a standing order template for a wire out order, FTD Mercury will transmit the wire out order during the night of the day you selected

Editing Existing Standing Order Templates

TASK To change an existing standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the list of active standing order templates, double-click on the appropriate standing order template. The **Standing Order Scheduler** window opens.
- 4 Make any changes to the **Start Date, End Date**, and recurrence for the template. If you do make changes to these, click **Generate** to create the new **Delivery Dates** list.

NOTE You can change the Start Date only if orders have not yet been generated based on this standing order template.

- 5 Review dates in the **Delivery Dates** list and make changes as necessary. If you changed the **End Date** to earlier than it was before, any delivery dates that fall after that date have been removed. If the new **End Date** is later than the previous **End Date**, new delivery dates may have been added based on the recurrence pattern.
 - » If there are dates in the list you do not want to include, select them and click **Remove**.
 - » If there are additional dates you want to add, select the date on the calendar and click **Add**. You are warned if the date you are adding is after the standing order template's end date.
- 6 If you want to make changes to product or delivery information, click **Save** and then click **Next**.
 - a. Make necessary changes in the **Order Entry** window.
 - b. Click **Complete** to return to the **Standing Orders** tab of the **Customer Detail Information** window.
- 7 If you did not need to make changes to product or delivery information, click **Save** to return to the **Standing Orders** tab of the **Customer Detail Information** window.
- 8 Click **Escape** to exit the **Customer Detail Information** window.

Any changes you make to an existing standing order template will be reflected when FTD Mercury creates future orders; already created orders will not reflect these changes.

Deleting Existing Standing Order Templates

TASK To delete an existing standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the list of active standing order templates, select the standing order template you want to delete and click **Remove**.
- 4 When asked, confirm the deletion.

The **Standing Order** tab refreshes and the standing order template you deleted is no longer displayed. FTD Mercury will not generate any future orders that were scheduled to be created based on this template.

Deleting Upcoming Orders to be Generated by a Standing Order Template

For various reasons, you may need to delete an upcoming order scheduled to be created by a standing order template, yet not want to delete the template itself.

TASK To delete an upcoming order that will be generated by a standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the list of active standing order templates, double-click on the appropriate standing order template. The **Standing Order Scheduler** window opens.
- 4 In the **Delivery Dates** list, select the date you want to remove and click **Remove**.
- 5 Click **Save**.

FTD Mercury will not generate the order for the date you removed.

NOTE You can only delete upcoming orders if the order has not been generated and printed already. If an order has been generated, you must cancel it as you would another order in the system.

Removing All Upcoming Orders Based on a Standing Order Template

TASK To delete an upcoming order that will be generated by a standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the list of active standing order templates, double-click on the appropriate standing order template. The **Standing Order Scheduler** window opens.
- 4 Click **Remove All**.
- 5 Click **Save**.

All future orders based on the standing order template that have not yet been generated are deleted. Orders that have already been generated must be deleted as you would with any other generated orders in FTD Mercury.

Printing a List of Standing Order Templates

You can print a list of the standing order templates associated with a customer. This prints only the list of standing order templates and not orders created from the templates.

TASK To print a list of standing order templates associated with a customer:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the **Store Name** list, select the store for which you want to display standing order templates associated with this customer, or select **All Stores** for a comprehensive list.
- 4 Click **Print Order**.

NOTE If there are many standing order templates, you may need to click **More** and repeat this procedure for subsequent pages in the grid.

Order Entry Invoices

When an order is saved in Order Entry, an invoice prints to your printer. FTD Mercury provides several configurable invoices (forms) to use when creating orders. The forms fall into the following main categories:

- » [Billing Invoices](#)
- » [Working Invoices](#) (also called worksheets)
- » [Cards](#)

Order Entry invoices can be customized in Mercury Administration. You may want to change the layout of the invoice so that you can print invoices on your store's special letterhead paper, or so that the invoice fits in a special window envelope. You may also want to omit certain information.

- » To change the guarantee message that prints at the bottom of the invoice, see [Store Settings Screen](#) on page 24–61.
- » To change the position of the addresses on the invoice, see [Form Alignment Screen](#) on page 24–78.
- » To change the items that are included on forms, see [Form Format Screen](#) on page 24–83.

Billing Invoices

There are two billing invoices available in FTD Mercury: Billing Invoice (Letter) and Billing Invoice (Legal). They are essentially the same form, with the main differences being paper size and Billing Invoice (Legal) includes a quad-fold card. Generally, you will print on the letter-sized billing invoice if you are printing trifold cards (and therefore do not need quad-fold cards from the invoice).

TIP For shops that used FTD Mercury prior to 8.0, the Billing Invoice (Legal) was the standard billing invoice.

The invoice contains a receipt, delivery slip for the delivery driver, and a card for the recipient. Most florists choose to print Order Entry invoices on invoice paper, which is perforated so that the card and delivery slip can be separated from the receipt portion of the invoice. When you complete or an order, the invoice prints with the words PICKUP, CARRY OUT, or WIRE OUT in large letters to indicate the order type (if other than local delivery). If you cancel an order, the word CANCELLED is printed on the invoice. If you file an invoice, the word FILED is printed on the invoice. Invoices for all order types include the time the order was entered.

NOTE When you select Sympathy as the occasion code in Order Entry or Point of Sale, legal-sized invoices print the funeral acknowledgement address (the sender's address) instead of the care instructions.

Working Invoices

There are two working invoices (worksheets) available in FTD Mercury: Working Invoice (Letter) and Working Invoice (Legal). They are essentially the same form, with the main differences being paper size and the Working Invoice (Legal) includes a quad-fold card. Generally, worksheets are used in the design portion of your shop. They contain all the pertinent information you need, including a product-by-product breakdown of the items in the order, second choice preferences, and order notes. For each item in the order that is not a fee (relay, delivery, etc.), the item appears on a separate line with a large check box that your designer can check when the item has been completed. If a recipe is available for the item, it is also displayed below the item name.

Figure 9-14: Working Invoice (Legal)






<p>ORDER NO: 000138/1 of 1 </p> <p>CUSTOMER: Jennifer Jones P: (630)555-1212 ORDER BY: Jennifer</p>	<p>Worksheet Doc's Blooms</p>	<p>DELIVERY DATE: Thu, 1/11/2007 DELIVERY TIME:</p> <p>PAYMENT: House SALESPERSON: Jim Roberts OCCASION: Birthday</p> <p style="text-align: right;">Page 1/1 COPY NO: 6</p>																										
<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 60%;">PRODUCT</th> <th style="width: 10%;">QUANTITY</th> <th style="width: 10%;">PRICE/UT</th> <th style="width: 10%;">DISCOUNT</th> <th style="width: 10%;">EXTENDED</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> ARR Arrangements</td> <td style="text-align: center;">1</td> <td style="text-align: right;">50.00</td> <td></td> <td style="text-align: right;">50.00</td> </tr> <tr> <td>DELIV Delivery Charge</td> <td style="text-align: center;">1</td> <td style="text-align: right;">9.00</td> <td></td> <td style="text-align: right;">9.00</td> </tr> <tr> <td colspan="3" style="border-top: 1px solid black;"> SECOND CHOICE: Dozen Roses </td> <td colspan="2" style="border-top: 1px solid black;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">SUB-TOTAL</td> <td style="text-align: right;">50.00</td> </tr> <tr> <td>Sales Tax</td> <td style="text-align: right;">9.00</td> </tr> <tr> <td>TOTAL</td> <td style="text-align: right;">62.98</td> </tr> </table> </td> </tr> </tbody> </table>			PRODUCT	QUANTITY	PRICE/UT	DISCOUNT	EXTENDED	<input type="checkbox"/> ARR Arrangements	1	50.00		50.00	DELIV Delivery Charge	1	9.00		9.00	SECOND CHOICE: Dozen Roses			<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">SUB-TOTAL</td> <td style="text-align: right;">50.00</td> </tr> <tr> <td>Sales Tax</td> <td style="text-align: right;">9.00</td> </tr> <tr> <td>TOTAL</td> <td style="text-align: right;">62.98</td> </tr> </table>		SUB-TOTAL	50.00	Sales Tax	9.00	TOTAL	62.98
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Sales Tax	9.00																											
TOTAL	62.98																											
<p>Card: HAPPY BIRTHDAY! FLORIST ID: 90-9085SN GROW FLOWER SHOP CHICAGO, IL 60611 PHONE: (630)555-1212 MERCURY ID: D8707H-0081</p>																												
<p>ORDER NO: 000141/1 of 1 DELIVERY ZONE: DG1</p>	<p>Heather Jones 123 Main Street Downers Grove, IL 60516 (630)555-1212</p>	<p> DELIVERY DATE: Thu, 1/11/2007</p> <p>Thu, 1/11/2007 RECEIVED BY: _____</p> <p style="text-align: center;">Doc's Blooms</p> <p style="text-align: right;">COPY NO: 1</p>																										
<p>Happy 21st Birthday!</p> <p>Love, James, Jennifer, Mom & Dad</p>	<p style="text-align: right;"></p> <p style="text-align: center;">Heather Smith 123 MAIN STREET DOWNERS GROVE, IL 60516 (630)555-1212</p> <p style="font-size: small;">Delivery Date: Thursday, 01/11/2007 Zone: DG1 Delivery Time: Order No: 000138/1 of 1</p>																											
<p>We have built an excellent reputation on beautiful flowers and prompt service. If we ever fail to meet your expectations, please let us know. We value you as a customer. It was our pleasure to give your order our personal attention.</p>	<p style="text-align: center;">CARE INSTRUCTIONS</p> <p style="text-align: center;">Ensure the arrangement is properly watered each day and is stored in a temperate location without drafts. Change the water every two days.</p> <p style="text-align: center;">Doc's Blooms</p>																											

Figure 9-15: Working Invoice (Letter)

ORDER NO: 000138/1 of 1 	Worksheet Doc's Blooms	DELIVERY DATE: Thu, 1/11/2007 DELIVERY TIME:																																			
CUSTOMER: Jennifer Jones P: (630)555-1212 ORDER BY: Jennifer	PAYMENT: House SALESPERSON: Jim Roberts OCCASION: Birthday	Page 1/1 COPY NO: 6																																			
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Thu, 1/11/2007 RECEIVED BY _____	Doc's Blooms	COPY NO: 1																																			

NOTE

When you select Sympathy as the occasion code in Order Entry or Point of Sale, legal-sized invoices print the funeral acknowledgement address (the sender's address) instead of the care instructions.

Cards

FTD Mercury provides one form that prints only a card, the TriFold Card form. However, the legal version of the billing invoice also includes a card. Typically, you will use the trifold card along with a letter version of the billing invoice.

The TriFold Card form in FTD Mercury allows you to print on a 4x9½-inch trifold card. The card itself consists of three sections. The upper section (3x4 inches) is for the card message. The middle section (3¼x4 inches) is for care instructions. The bottom section (3¼x4 inches) is for the recipient name and address.

IMPORTANT Trifold cards require a printer capable of handling the smaller paper size. For more information, contact FTD Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com.

By default, FTD Mercury leaves a ¼ inch border on all sides of the card message section so you can use imprinted cards for you shop. Additionally, FTD Mercury leaves a ½ inch border at the bottom of the recipient section so you can use cards with your store logo (if desired).

NOTE When you select Sympathy as the Occasion Code in Order Entry or Point of Sale, legal-sized invoices print the acknowledgement address (the sender's address) instead of the care instructions. Clearing this option does not prevent the acknowledgement address from printing.

You can configure the information printed on the TriFold Card form in the Form Formats screen of Mercury Administration. By default, all information will print for the TriFold Card form except for Borders. If you do not print borders, you can easily use imprinted paper for your trifold cards.

IMPORTANT Guarantees, available on cards for the Billing Invoice (Legal) and Working Invoice (Legal), are not available for the TriFold Card form.

Figure 9-16: TriFold Card

The diagram shows a vertical tri-fold card with the following content and callouts:

- 1** Border: Points to the outer frame of the card.
- 2** Care Instructions: Points to the text: "Ensure the arrangement is properly watered each day and is stored in a temperate location without drafts. Change the water every two days."
- 3** Store Name: Points to "Doc's Blooms".
- 4** Recipient Phone: Points to the recipient's address block.
- 5** Delivery Date: Points to "DELIVERY DATE: 1/11/2007".
- 6** Time Detail: Points to "DELIVERY TIME:".
- 7** Delivery Zone: Points to "ZONE: DG1".
- 8** Order Number: Points to "ORDER NO: 000145/1 of 3".
- 9** Bar Code: Points to the barcode.

Card Content:

Happy 21st Birthday!

Love,
James, Jennifer,
Mom & Dad

CARE INSTRUCTIONS

Ensure the arrangement is properly watered each day and is stored in a temperate location without drafts. Change the water every two days.

Doc's Blooms

Heather Smith
123 MAIN STREET
DOWNERS GROVE, IL 60516
(630)555-1212

DELIVERY DATE: 1/11/2007
DELIVERY TIME:

ZONE: DG1
ORDER NO: 000145/1 of 3

- | | | |
|----------------------------|--------------------------|------------------------|
| 1 Border | 4 Recipient Phone | 7 Delivery Zone |
| 2 Care Instructions | 5 Delivery Date | 8 Order Number |
| 3 Store Name | 6 Time Detail | 9 Bar Code |

Pool Tickets

If you purchase a license for pool tickets, FTD will customize a form for your delivery pool based on your specifications. Like other forms, the number of pool tickets printed per sale type is configured in the **Default Form Printing** screen in Mercury Administration. You configure the printers with pool tickets in the **Printer Form Settings** window (see [Printer Form Settings Window](#) on page 2-12 for details).

Contact Mercury Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com for information on purchasing a license and creating a custom pool ticket.

Printing Invoices to Remote Locations

If you need to print an invoice to a remote location, you can do so using one-off printing (see [One-Off Printing](#) on page 9-84 for details). You can also set up a remote printer as your default printer for forms see [Printer Form Settings Window](#) on page 2-12 for details).

Faxing and Emailing Invoices

In addition to printing invoices, you can also fax and/or email an invoice to a customer.

NOTE The setup requirements for faxing and emailing invoices are the same as for faxing and emailing statements. See [Required Setups for Faxing and Emailing Statements](#) on page 18-9 for more information.

TASK **To fax or email an invoice to a customer:**

- 1 Perform a ticket search to locate the order.
- 2 Select the order and click **Output Invoice**. The **Output Options** window appears, allowing you to set your print/fax/email settings.
- 3 Select whether you want to print, fax, and/or email the invoice to the customer.
- 4 Check the settings for each option. Make sure the fax number and email address fields are populated, and indicate the cover letters you want to use.
- 5 When you are finished, click **Execute** and the print job/fax/email is sent.

To view the status of the fax or email, check the **Fax and Email Monitor**. For faxes and email messages, the **Fax and Email Monitor** displays the order/ticket number, customer name, status, sent date/time, fax number/email address, and number of attempts. For more information on the **Fax and Email Monitor**, see [Fax and Email](#) on page 22-1.

Output Options Window

The **Output Options** window allows you to select your printing, faxing, and e-mailing settings when sending invoices. You can also print one-off forms and reprint Point of Sale receipts from this window.

Figure 9-17: Output Options Window

The screenshot shows the 'Output Options' window with the following settings:

- Print Output:**
 - Print Invoice
 - Print Receipt
 - Store Name:
 - Statements Per Page: One Two
 - Ticket:
 - Form:
 - Printer Name:
 - Printer Tray:
- Fax Output:**
 - Fax
 - Now Later
 - Time:
 - Cover Letter:
 - Fax Number:
- Email Output:**
 - Email
 - Now Later
 - Time:
 - Cover Letter:
 - Recipient Email Address:
 - Carbon Copy:
 - Subject:
- Fax and Email Information:**
 - Recipient:
 - Sender:
 - Job Description:
 - Personal Message:

Buttons at the bottom:

First select whether you would like to print, fax, and/or email the invoice to the customer (select the check box so a check mark appears). You can select any combination of these three methods:

Table 9-24: Output Methods

Method	Description
Print	Select whether you are printing an invoice or a receipt (receipts can only be printed from Point of Sale). If you are printing invoices, ensure your store name is selected (which dictates the available printers). Then select the ticket you are printing, the form to use, the printer, and the tray in the printer.
Fax	If you are faxing the invoice, first select whether you would like to fax Now or Later. If you select Later, you can specify a later time. Enter the customer's fax number and select a cover letter (fax cover letters are maintained in Mercury Administration).

Table 9-24: Output Methods (cont.)

Method	Description
Email Output	If you are e-mailing the invoice, first select whether you would like to e-mail Now or Later. If you select Later, you can specify a later time. Enter the customer's e-mail address and select a cover letter (cover letters are set up in the FTD Document Center). Enter the customer's e-mail address (if one does not display). If you would like a copy of the e-mail to be sent to your e-mail inbox, enter that e-mail address in the Carbon Copy field. The Subject field is the subject line of the e-mail.

Fax and Email Information

If you are faxing or emailing the invoice, type the customer name in the **Recipient** field, type your name in the **Sender** field. The **Job Description** field lists the job detail (it is recommended not to change this information). If you would like to type a personal message to appear in the customer's email, type the text in the **Personal Message** field.

Delivery Confirmation

Delivery Confirmation allows you to send a confirmation email message to a customer automatically when an order is marked Delivered. If you have Wireless Delivery Confirmation, drivers mark orders Delivered on wireless phones while they are on route. If you do not have Wireless Delivery Confirmation, drivers mark orders Delivered when they return from the delivery trip.

You can send three types of delivery confirmation email messages: local delivery, outgoing delivered, and outgoing delivered with an Answer message received from the filling florist. In Mercury Administration, you can select different templates for each order type.

Table 9-25: Confirmation Email Types

Confirmation Email Type	Description
Local Delivery	Delivery confirmation email messages are sent for local delivery orders when orders are marked Delivered in the Mercury Delivery application, Ticket Search, or in the delivery information section of the order.
Outgoing Delivered	For outgoing orders, delivery confirmation email messages are sent when the order is marked Delivered in the Mercury Delivery application, Ticket Search, or in the delivery information section of the order.
Outgoing Delivered with ANS Received	If an ANSwer message is received back from a filling florist, you can select a different email template to use. You may want to use a different template that states that you received a confirmation from the filling florist. The delivery confirmation email is sent when the order is marked Delivered in the Mercury Delivery application, Ticket Search, or in the delivery information section of the order.

Delivery confirmation email messages are sent immediately if you are already connected to the Internet, or if you are not connected, email messages are sent when the polling interval expires (by default, every 20 minutes). To change the polling interval, see [Mercury Connection Screen](#) on page 24-35.

Required Configurations for Delivery Confirmation

Before you can send delivery confirmations, you need to configure several settings:

Set Up an Internet Connection

Set up an Internet connection in Mercury Administration. You must have an Internet connection to send email. You can use any type of Internet connection (dial-up [AOL only], DSL, etc.), as long as you can connect. If you do not already have an Internet connection, see [Internet Screen](#) on page 24–30 to learn how to set it up.

If you are using a dial-up connection, you must specify which phone line is used for the Internet. See [Phone Lines Screen](#) on page 24–37 to learn how to set up this information.

Configure ISP Information

Set up your ISP information in Mercury Administration. If you do not already have access to the Internet, you have to sign up with an ISP company. You can do this on your own, or the FTD Mercury Assistance Center at 1-800-669-1000 can help you (you can sign up with FTD's ISP service, FTD InternetLink). An ISP is a company that provides you with the software or access information that enables your computer to connect to the Internet. If you can connect to the Internet, you are already using an ISP.

After signing up with an ISP, you must set up FTD Mercury with your Internet and outgoing mail server information for that ISP. See [Internet Screen](#) on page 24–30 and [MailServer Screen](#) on page 24–31 to learn how to set up this information.

Create Delivery Confirmation Email Templates

Create your delivery confirmation email templates in the FTD Document Center. Before you can send a delivery confirmation email, you must create at least one email template. The template includes the email text that you want to send to the customer, and can also include graphics and order/customer information. See [FTD Document Center](#) on page 23–1 for more information.

Select Delivery Confirmation Templates and Set up Default Email Settings

Select your delivery confirmation templates and set up your default email settings in Mercury Administration. When you are finished creating your email templates, you must select which template to use for outgoing and local delivery orders. Also, there are many other defaults that you must set up, like your reply email address, or whether you want to send confirmations NOW or a specified LATER time. See [Email Screen](#) on page 24–25 for more information.

Sending Delivery Confirmation Email Messages

After you have set up your system as indicated in [Required Configurations for Delivery Confirmation](#) on page 9–73, you are ready to send delivery confirmation email messages. To send a delivery confirmation in Order Entry or Point of Sale, click **Delivery Info** to enter the delivery confirmation information. If the customer is set up to receive delivery confirmation email messages (Delivery Confirmation is checked in the General tab of the Customer Detail Information window for the customer), and you have selected the delivery zone for the order, the delivery confirmation fields are active.

If the customer has an email address on file and you have a template selected for local and/or outgoing deliveries in the **Email** screen in Mercury Administration (see [Email Screen](#) on page 24–25), then the information should be completed for you automatically. If the information is not complete (for example, you were warned when saving that there is no email address on the customer account), complete the information in this section of the screen as necessary.

For more information, see [Delivery Information Window](#) on page 9–89.

The email is sent when the order is marked Delivered. Orders can be marked Delivered in three ways:

- » In the Mercury Delivery application (manually or by phone) if you purchased the Mercury Delivery module (see [Truck Return](#) on page 14–28).
- » In Order Entry or Point of Sale (see [Marking Orders Delivered in Order Entry](#) on page 9–74).
- » In Ticket Search, if you change the value of the Delivery column for a ticket.

NOTE In Mercury Administration, you have the option to send delivery confirmation email messages NOW or LATER. If you selected LATER, a later time was specified. See [Email Screen](#) on page 24–25 for details.

To verify that the email was sent, check the **Email** tab of the Fax & Email Monitor (see [Fax & Email Monitor Application](#) on page 22–1).

Automatically Sending Delivery Confirmation ANS Messages

In addition to emailing customers who place orders with you, you can also send a Delivery Confirmation (ANS) message back to a sending florist for wire in orders. This lets the sending florist know their order has been delivered.

TASK To configure FTD Mercury to automatically send a Delivery Confirmation (ANS) message to sending florists when orders have been delivered:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Customer**. The **Customer Search** window opens.
- 2 In the **Customer Name** field, enter **FTD**.
- 3 Click **Search**.
- 4 From the results list, double-click the FTD house account. The **Customer Detail Information** window opens, displaying the **General** tab.
- 5 Ensure the **Delivery Confirmation** check box is selected.
- 6 Click **Save**.

From now on, for all attached incoming wire orders, when you mark the order as delivered in Ticket Search, in Ticket Status, or in Mercury Delivery, a Delivery Confirmation (ANS) message will be sent to the filling florist.

Marking Orders Delivered in Order Entry

If you have Mercury Delivery, the best place to maintain delivery status is from there. However, if you do not use Mercury Delivery, you can also change delivery status via the Ticket Status window.

TASK To mark an order as delivered from the Ticket Status window:

- 1 Use Ticket Search to locate the ticket and open it in Order Entry.
- 2 Click **Status**. The Ticket Status window opens.
- 3 In the Delivery area, click the Edit button.
- 4 From the Status list, select **Delivered**.
- 5 Click **Save** to save your changes.
- 6 Click **Escape** to close the Ticket Status window.
- 7 Click **Update** to update the order (and save your Ticket Status changes).

Marking Orders as Delivered in Ticket Search

You can also mark orders as delivered in Ticket Search.

TASK To mark an order as delivered in Ticket Search:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket Search**. The **Ticket Search** window opens.
- 2 Enter search criteria to locate the ticket and click **Search**.
- 3 In the results list, click in the **Delivery** column for the ticket you want to mark delivered and select **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 Ticket Search, the changes that you make in Ticket Search 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).

Processing Refunds & Exchanges

From time to time, you may need to issue a refund when a customer returns an item (or an entire order). You may also have to handle when a customer wants to exchange an item for another item, often costing different amounts. There are two types of refunds: one-click refunds and standard refunds.

One-click refunds are typically much faster to perform than standard refunds, and have the added benefit of associating the refund with the original sale and the original sale with the refund. That being said, there are limitations on when you can use one-click refunds. The sale cannot be incomplete, pending, or cancelled. The sale or ticket cannot contain an item with a statement category of coupon. The original ticket cannot be a zero-amount sale, a debit memo, a credit memo, or a payment. Fortunately, the vast majority of sales you make will not have any of these limitations, and so you will be able to create a one-click refund for them. One-click refunds also remove orders from production if the order has not been delivered. If a refund is created prior to the order being delivered, the original order will not display in Mercury Delivery. (If you want to refund an order but the original ticket should still remain in production, the refund should be created manually using a new sale-based refund.)

New sale-based refunds involve creating a new sale to create a refund. You then can enter the returned items with refund indicators. In some circumstances, you can copy the existing sale and use that as a starting point for the refund. Standard refunds do not link the original sale to the refund. Typically, you should only perform standard refunds if you cannot perform a one-click refund or if a customer is returning only one or two items from an order that had many items. In the latter case, although you could perform a one-click refund, it may be more time consuming to remove all of the items the customer is not returning from the refund sale.

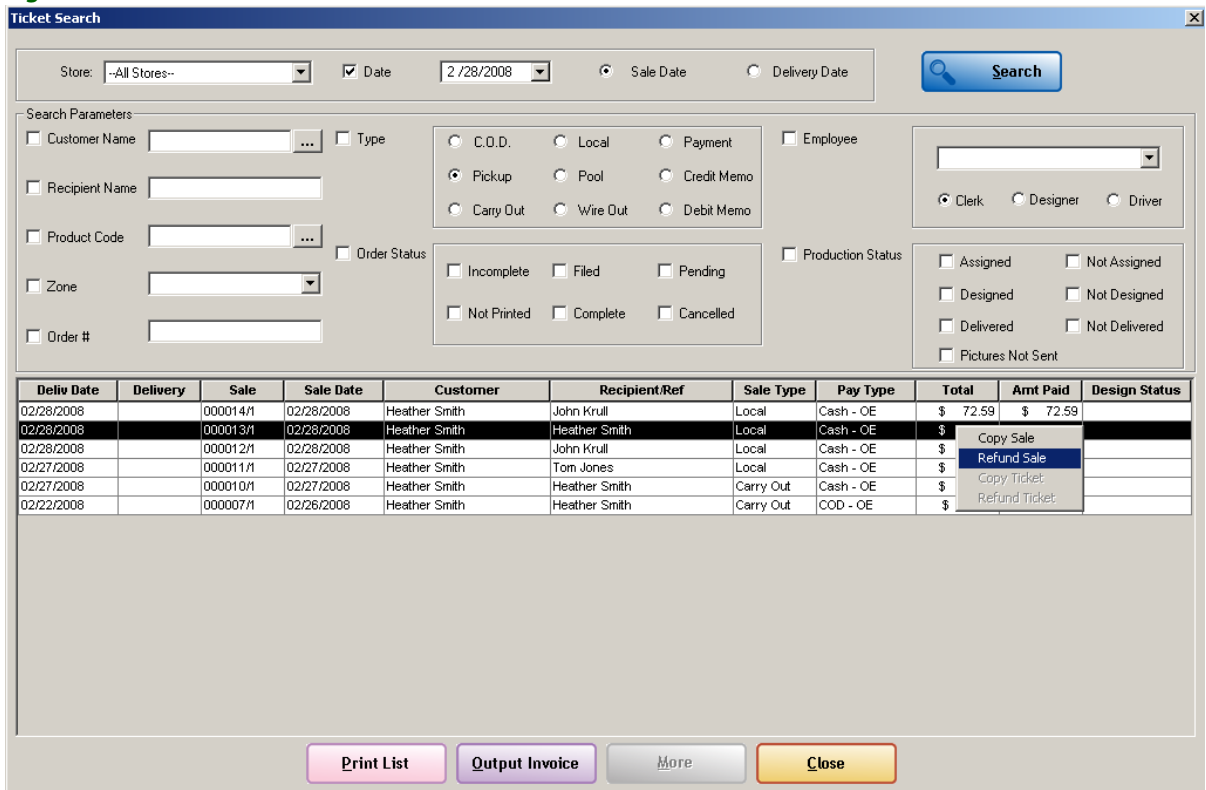
Additionally, the original ticket cannot be a zero-amount sale, a debit memo, a credit memo, or a payment.

Refunds and Ticket Search

Ticket Search displays original sales and sales that have been refunded. If you use a one-click refund on an order, the refund sale will display the associated sale number in the Recipient/Reference column (as long as you do not change the recipient name when creating the refund). The text that displays reads Refund of Sale <Original Sale ID>. Once a refund is completed, the original sale used to create the refund is highlighted in light blue in Ticket Search.

NOTE You can also perform refunds by creating a new sale. For more information, see [New Sale–Based Refunds and Exchanges](#) on page 9–79.

Figure 9-18: One-Click Refunds from Ticket Search



Refunding Entire Sales with One-Click Refunds

You can perform a one-click refund on most sales to refund the entire sale. You cannot, however, perform a one-click refund on a sale that contains an item with a statement category of coupon. If you attempt a one-click refund and the option to refund the sale is not available, this may be the reason.

TASK To refund an entire sale using a one-click refund:

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and click **Refund Sale**.
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This sale contains all items and tickets in the original sale you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.
- 4 Verify the items that are being refunded.
- 5 Click **Complete**. The **Payments** window opens.
- 6 Verify the payment information and type. You may need to change the payment type depending on how you want to issue the refund.
- 7 Click **Complete**.

Depending on the payment type, the customer's house account is refunded, the customer's credit card is refunded, or the cash drawer opens so you can refund the customer using cash.

Refunding Single Tickets with One-Click Refunds

If you have a multi-ticket order, you can use a one-click refund to refund a single ticket rather than the entire sale. You still cannot refund a ticket that contains an item with a statement category of coupon.

TASK To refund a single ticket in a multi-ticket sale using a one-click refund:

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and click **Refund Ticket**.
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This refund sale contains the contents of the ticket you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.
- 4 Verify the items that are being refunded.
- 5 Click **Complete**. The **Payments** window opens.
- 6 Verify the payment information and type. You may need to change the payment type depending on how you want to issue the refund.
- 7 Click **Complete**.

Depending on the payment type, the customer's house account is refunded, the customer's credit card is refunded, or the cash drawer opens so you can refund the customer using cash.

Partial Refunds of Sales with One-Click Refunds

In addition to refunding an entire sale using a one-click refund, you can also refund some items in a sale. Essentially, it is the same procedure, however, you need to remove the items the customer is not returning from the refund sale. You cannot use one-click refunds for sales containing items with a statement category of coupon.

TASK To issue a partial refund of a sale using a one-click refund:

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and click **Refund Sale**.
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This sale contains all items and tickets in the original sale you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.
- 4 For each ticket in the sale, remove the items from the product grid that are not being returned. To do so, right-click on an item and click **Remove**.
- 5 Verify the remaining items that are being refunded.
- 6 Click **Complete**. The **Payments** window opens.
- 7 Verify the payment information and type. You may need to change the payment type depending on how you want to issue the refund.
- 8 Click **Complete**.

Depending on the payment type, the customer's house account is refunded, the customer's credit card is refunded, or the cash drawer opens so you can refund the customer using cash.

Partial Refunds of Single Tickets with One-Click Refunds

You can also use one-click refunds to refund part of a ticket from a multi-ticket sale. You simply remove the items from the refund sale that the customer is not returning. You cannot use one-click refunds for tickets containing items with a statement category of coupon.

TASK To issue a partial refund of a single ticket of a multi-ticket sale using a one-click refund:

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and click **Refund Ticket**.
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This sale contains all items in the original ticket you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.
- 4 Remove the items from the product grid that are not being returned. To do so, right-click on an item and click **Remove**.
- 5 Verify the remaining items that are being refunded.
- 6 Click **Complete**. The **Payments** window opens.
- 7 Verify the payment information and type. You may need to change the payment type depending on how you want to issue the refund.
- 8 Click **Complete**.

Depending on the payment type, the customer's house account is refunded, the customer's credit card is refunded, or the cash drawer opens so you can refund the customer using cash.

Handling Exchanges with One-Click Refunds

You can also use one-click refunds to handle exchanges. When a customer wants to return one or more items and wants to replace them with other items that may not cost the same, you can use this procedure. Like other one-click refund operations, you cannot use this procedure if the original sale or ticket contains items with a statement category of coupon.

If the exchange results in money being owed to the customer, the exchange will be linked to the original sale. However, if the customer owes money after the exchange, the exchange will not be automatically linked to the original sale (because of this, you should add order notes including the original sale ID so you can determine the original sale for this refund).

IMPORTANT You should not use a one-click refund for an exchange that involves a new delivery or wire out order. For this situation, perform the refund separately and then enter the new order as you normally would.

TASK To perform an exchange using a one-click refund:

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and either click **Refund Ticket** or **Refund Sale**, depending on whether the items the customer is returning are from a single ticket in a multi-ticket sale (if it is a multi-ticket sale and all refunds are on one ticket, use **Refund Ticket**, otherwise use **Refund Sale**).
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This sale contains all items in the original ticket you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.

- 4 For each ticket in the sale, remove the items from the product grid that are not being returned. To do so, right-click on an item and click **Remove**.
- 5 Add new items to the product grid as you normally would.
- 6 Click **Complete**. The **Payments** window opens.
- 7 Verify the payment information and type. You may need to change the payment type. If the new items cost less than the returned items, you will issue a refund to the customer. If the new items cost more, the customer will need to pay you the difference.
- 8 Click **Complete**.

If a refund is issued, depending on the payment type, the customer's house account is refunded, the customer's credit card is refunded, or the cash drawer opens so you can refund the customer using cash. If the customer owes you, depending on the payment type, the customer's house account is charged, the customer's credit card is charged, or the cash drawer opens for you to accept the customer's cash or check.

New Sale–Based Refunds and Exchanges

The other type of refund you can perform is a new sale–based refund. Essentially, this is a negative-value sale, where you create a new sale and check the refund indicators in the product grid. This results in you owing the customer a refund, whether it be in cash, as a credit to their house account, or as credit back to their credit or debit card.

One situation where you must use a new sale–based refund is when the original sale contains a coupon. You might also use it if a customer is purchasing several items and only returning one item. One potential issue with new sale–based refunds is that there is no link between the original sale and the returned item. You can mitigate this by entering the original sale ID in the order notes for the new sale.

Refunds and Wire Out Orders

You cannot issue a refund for an order that has a wire out delivery zone, either using one-click refunds or new sale-based refunds. You must pick a different delivery zone for the order. When a one-click refund is created for a wire out order, the delivery zone is automatically changed to N/A. Refunds cannot be completed if the delivery zone is set to a wire out zone.

When one-click refunds are created, the fees and taxes associated with the original order are retained for the refund.

Refund Window

Figure 9-19: Refund Window

Marketing

Referral Code:

Payments

Type	Account Number	Exp Date	Name	Approval	Amount
House	0000024				\$ 1,282.79
House	0000024				\$ 0.00

Remove

Cardholder Present:

Sub. Total: \$ 1204.80
Sales Tax: \$ 77.99
Total: \$ 1282.79
Amount Refunded: \$ 0.00
Cash Due: \$ 0.00

Complete Save Escape

The Refund window is essentially the same as the Payments window, except you are providing a refund for returned merchandise.

TASK To complete the Refund window:

- 1 If the refund will be given as a payment on a house account, you will need to fill in the customer information:
 - » For a new customer, click **Add** to open the **Customer Detail Information** window, where you can fill in the **General**, **House Account**, and **Custom** tabs, before clicking **Save** and returning to the **Order Entry** window.
 - » For an established customer, type the customer's name and click **TAB** so that the system can locate the customer's information, or click ... to perform a **Customer Search**. Once you have located the customer's information in the **Customer Search** window, click **Select** so the customer information will fill in the top part of the **Payment** window automatically. You may click in the **Address Information** and **Phone Information** areas to view other addresses and phone numbers that may have been entered for this customer.
- 2 In the **Payments** area, indicate the type of refund. The **Cash Due** field will indicate the amount of cash to give to the customer. This field will usually equal the **Amount Refunded** and **Total** fields, unless the refund is being given in a different payment type. The **Amount Refunded** and **Total** fields should be equal at the completion of the refund.
- 3 Click **Complete** to complete the refund.

Order Life Cycle

Order Life Cycle in FTD Mercury tracks the status of wire out orders sent to filling florists over the Mercury Network. You can also use it to track the status of a local order. For orders that originate in your shop and are wired out, it is possible to have information tracked for both your portion of the transaction as well as the filling florist's portion.

IMPORTANT Both your system and the filling florist's system must be running FTD Mercury X1 or later to view a filling florist's order life cycle details.

Tracking Order Life Cycle

You must have already created an order (either local or wire out) to view order life cycle messages. These messages are displayed in the Ticket Status window, accessible via Order Entry or Point of Sale. For more information, see [Ticket Status Window](#) on page 9-86.

NOTE Order life cycle information cannot be edited.

TASK **To track the life cycle of an order:**

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. The **Ticket Search** window opens.
- 2 Enter search criteria to locate the ticket, and click **Search**.
- 3 Double-click on the ticket in the results list. Depending on your system and where the order was originally entered, the **Order Entry** window or **Point of Sale** window opens.
- 4 Click the **Status** button. The **Ticket Status** window opens.

The Order Life Cycle area displays the order life cycle messages in reverse chronological order (that is, the most recent is listed at the top).

Order Life Cycle Messages

Messages for order life cycle are created when the following events occur:

- » When an order is received over the Mercury Network
- » When an order is attached
- » When an order is printed (only for the first copy; subsequent prints do not generate a message)
- » When an order is marked as assigned and designed
- » When an order is marked as on the truck
- » When an order is marked delivered
- » When an order is marked with a reason code (the reason code text is included with the message (this can be either that an order was delivered or it was not delivered))

When an order contains multiple products that are assigned and designed, the message will not be sent until all products on that order have been assigned or designed.

Retention of Order Life Cycle Messages

Order life cycle messages are maintained based on the Months to Hold configuration in the General screen of Mercury Administration. Life cycle messages are not purged until orders are purged from the system.

Additional Order Tasks & Windows

In addition to entering and attaching orders, you can perform many other tasks relating to order entry and editing orders. These tasks include:

- » [Copying Tickets in Order Entry and Point of Sale](#)
- » [Removing Individual Tickets from Sales](#)
- » [Using Bar Codes](#)
- » [Editing Existing Orders](#)
- » [Cancelling Orders](#)
- » [One-Off Printing](#)
- » [Editing an Order from History](#)
- » [Card Messages and Font Sizes](#)
- » [Sending a Card to Multiple Recipients](#)

Additionally, you can access other windows from Order Entry and Point of Sale. These windows include:

- » [Ticket Status Window](#)
- » [Delivery Information Window](#)
- » [Map It Window](#)
- » [Cancel Confirmation Window](#)
- » [Multiple Recipients Window](#)
- » [Cancel or Void Order Window](#)

Copying Tickets in Order Entry and Point of Sale

In both Order Entry and Point of Sale, you can duplicate a ticket within the sale. This is useful if you have identical (or nearly identical) orders being sent to different recipients from the same customer.

TASK **To duplicate a ticket in Order Entry or Point of Sale:**

In the **Order Entry** or **Point of Sale** window, right-click on the ticket tab at the bottom of the order and click **Copy**. The ticket is duplicated exactly. Click on the new ticket and edit it as you normally would.

You cannot have more than 50 individual tickets in a sale.

Removing Individual Tickets from Sales

You can remove individual tickets from a multi-ticket order in both Order Entry and Point of Sale. However, you cannot remove a ticket once payment has been received on an order (unless the sale is paid by house charge).

IMPORTANT If you remove a ticket from a sale, the ticket is removed, not canceled. There will be no record that the ticket you removed ever existed.

TASK **To remove a ticket from an order that contains multiple tickets:**

- 1 From the **Order Entry** or **Point of Sale** window, right-click on the tab of the ticket you want to remove and click **Remove**.
- 2 Confirm the ticket removal.

Once you have removed a ticket, the payment amount is updated to reflect the new order amount.

Using Bar Codes

You can scan products in the Order Entry and Point of Sale with a bar code scanner. To scan a bar code, your cursor must be in the Product Code field. When you scan the bar code, FTD Mercury checks to see if there is a product in the database that is associated with that bar code. If the system finds a match, the Product Code, Qty, and Description fields fill in automatically. If the bar code has a default price associated with it, the Amount field also fills in. If there is no default price specified, you have to enter the price manually.

If you scan a bar code that is not in the system, a window pops up asking if you want to create a new product with the scanned bar code. Click **Yes** to enter the bar code into the system, or click **No** to enter a different product code.

You may also perform product searches by typing in the full bar code for a product.

For more information on setting up, scanning, and printing bar codes, see [Bar Codes](#) on page 8–20.

Editing Existing Orders

Once you perform a Ticket Search and select a ticket, you can edit the ticket in Order Entry or Point of Sale.

TASK To edit an existing order:

- 1 On the **FTD Mercury Main Menu**, either click **Order Entry** or **Point of Sale**.
- 2 Click **Lookup**. The **Ticket Search** window opens.
- 3 Enter search criteria to locate the ticket and click **Search**.
- 4 From the results list, double-click on the ticket you want to edit. It opens in **Order Entry** or **Point of Sale** (depending on where you opened **Ticket Search**).
- 5 Edit information as needed.
- 6 Click **Update** to save this order and close this window.

Cancelling Orders

When you cancel an order, the amount is refunded to the customer's house account or credit card. If the sale was a cash sale, cash is refunded back to the customer.

Cancelling Orders in Order Entry

TASK To cancel an order in Order Entry:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 Click **Lookup**. The **Ticket Search** window opens.
- 3 Enter criteria to locate the order and click **Search**.
- 4 Double-click the order you want to cancel from the results list. It opens in Order Entry. Click **Cancel Order**.
- 5 When the **Are you sure you want to cancel this order?** message appears, click **Yes**.
- 6 When the empty **Order Entry** window reappears, the order has been cancelled.

Cancelling Orders in Point of Sale

TASK To cancel an order in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 Click **Lookup**. The **Ticket Search** window opens.

- 3 Enter criteria to locate the order and click **Search**.
- 4 Double-click the order you want to cancel from the results list. It opens in **Point of Sale**.
- 5 Click **Void Order**. The **Cancel or Void Order** window opens.
- 6 Enter your employee name and password. Click **OK**.

IMPORTANT Only authorized employees may void orders.

- 7 The **Refund** window opens, displaying the amount to be refunded and how the refund will be issued (back on a credit card, on a house account, or cash).
- 8 Click **Complete**.

If the refund was issued in cash, the cash drawer will open. Provide the customer the correct amount for the refund.

One-Off Printing

When you create an order, cards and/or forms print according to settings in Mercury Administration. However, you can also print one-off forms and cards from Order Entry and Point of Sale. This allows you to replace lost or damaged forms, and in multi-store environments you can print invoices to another store.

Printing a One-Off Form for an Existing Sale

Prior to printing a one-off form or card, you must have the Order Entry or Point of Sale window open. Perform a Ticket Search to locate the sale.

TASK To print a one-off form or card for an existing sale:

- 1 Perform a **Ticket Search** to locate the existing sale.
- 2 From the **Order Entry** or **Point of Sale** window, with the order open, click **Printer**. The **Output Options** window opens.
- 3 Ensure the **Print Invoice** option in the **Print Output** area is selected, and the **Fax** option (in the **Fax Output** area) and the **Email** option (in the **Email Output** area) are cleared.
- 4 By default, the store selected in the **Store Name** list is the currently logged in store. In a multi-store environment, you can select another store to print the forms to another store.
- 5 If you have multiple tickets in this order, from the **Ticket** list, select the ticket you want to print, or click **ALL** to print all tickets.
- 6 From the **Form** list, select the form you want to print.
- 7 From the **Printer Name** list, select the printer where you want to print the form, and from the **Printer Tray** list, select the printer tray on the selected printer that holds the paper you want to use. The default for these lists are based on the form you selected; if no default printer exists for this form, both the **Printer Name** and **Printer Tray** lists will be blank by default.
- 8 Click **Execute**.

The form you selected for the sale selected prints according to the settings you selected. When a form is printed a second (or subsequent) time, the form will indicate the number of times it has been printed.

Printing a One-Off Form for a New Sale to Another Store

FTD Mercury also allows you to set one-off printing options for a new sale. The only scenario you should use this for is in a multi-store environment where you want to print an order placed at one store at another store. For example, if a customer comes to your East Side store and wants to place an order for delivery in an area served by your West Side store, you can print the order invoice and working invoice to your West Side store automatically.

TASK To print invoices associated with a new sale to another store:

- 1 In the **Order Entry** or **Point of Sale** window, before you click **Complete**, click **Printer**. The **Output Options** window open.
- 2 Ensure the **Print Invoice** option in the **Print Output** area is selected, and the **Fax** option (in the **Fax Output** area) and the **Email** option (in the **Email Output** area) are cleared.
- 3 From the **Store Name** list, select the store where you want to print the invoice(s).
- 4 Click **Save**. You are returned to Order Entry or Point of Sale. Complete the order as usual.

IMPORTANT If you change the zone after you have configured to print at a different store, you will need to repeat the procedure.

When you complete the order, forms are printed at the selected store according to the default settings in Mercury Administration for that store.

FTD recommends you contact your other store to ensure the invoices printed as expected.

Editing an Order from History

In some cases, you may be able to make price, payment, recipient, and/or card changes on an order. Please refer to the following grid for guidelines regarding when you can modify cost and payment information on a ticket. If the ticket included a Mercury Order, it may not be changed without sending an ASK message to get permission from the other florist. If you are unable to change the order, you must issue a credit memo to the customer's house account, or issue a credit card refund.

Table 9-26: Changing and Canceling Completed Orders in Order Entry

Entered In	Recalled In	Before/After Z-out	POS Terminal	Cash/Check/Gift Certificate Sale	CC Approved not Settled	CC Declined	CC Settled	House Prestatement	House on Statement House with payment applied	In GL Batch
OE	OE	N/A	N/A	yes	yes	yes	no	yes	no	no
POS	POS	Before	Original	yes*	yes†	yes†	no	yes†	no	no
POS	POS	Before	Other	no‡	no‡	yes†	no	yes†	no	no
POS	POS	After	Original	no‡	no‡	yes†	no	no	no	no
POS	POS	After	Other	no‡	no‡	yes†	no	no	no	no
OE	POS	N/A	N/A	yes	yes	yes	no	yes	no	no
POS	OE	Before	N/A	no	no	no	no	yes**	no	no
POS	OE	After	N/A	no	no	no	no	yes**	no	no

* Cannot change customer, price, or cash/check/gift certificate payments.

† Credit payments may be changed if they are unsettled, and House Charge payments may be changed if there has been no payment applied and no statement generated. Cash, check, and gift certificate payments may not be changed.

‡ Cancels and Voids are allowed.

**Cannot be cancelled or voided, and non-house payment types may not be added or changed.

Card Messages and Font Sizes

The default font size for card messages is 16 point, which is perfect for most card messages. You can change the font size for cards in Mercury Administration (see [Store Settings Screen](#) on page 24–61).

There may be an instance when a customer wants to include a very long card message on the card. For example, the default 16 point font may be too large to fit on the card. If the font size is too large for the long card message to fit on the card, you receive a message similar to this:

The Card Message is currently 23 lines with a font size of 16 points. This is too large and will print over the guarantee on the invoice. The suggested font size for your card is 6 points. Would you like to change to this font size?

Click **Yes** to accept the font size change so that the card message fits on the card. If you click **No**, the printed message exceeds the size of the card. You may then have to hand write a card for the customer. If you click **Cancel**, you return to the Order Entry or Point of Sale window without accepting changes.

Sending a Card to Multiple Recipients

TASK To create an enclosure card for multiple recipients:

- 1 Enter an order in Order Entry or Point of Sale as you would normally.
- 2 In the **Card** area, enter the card message or use abbreviation codes.
- 3 Click **Add Recipients**. The **Multiple Recipients** window opens.
- 4 Enter the name of each recipient that will receive this card. As you add each name, a new line appears for the next recipient.
- 5 When you finish adding recipients, click **Save** to return to the **Order Entry** or **Point of Sale** window.

Ticket Status Window

The Ticket Status window is accessible for local and wire out orders once the order has been entered (that is, you cannot access Ticket Status during the order entry process).

Figure 9-20: Ticket Status Window

The screenshot shows a 'Ticket Status' window with the following sections:

- Ticket:** Number: 000058/1, Updated: Thursday, July 17, 2008 12:01 PM
- Printed:** Copy #: 1, Printer: (empty), Time: Thursday, July 17, 2008 12:01 PM
- Designer:** Status: Designed, Designer: Deanna, Date Designed: Thursday, July 17, 2008 12:02 PM
- Delivery:** Status: (dropdown), Route: (empty), Date: (empty), Driver: (empty), and an **Edit** button.
- Order Life Cycle:** A table with columns: Date, Employee, Status, Text.

Date	Employee	Status	Text
7/17/2008 12:02:18 P		Designed	
7/17/2008 12:02:00 P		Assigned to Designer	
7/17/2008 12:01:19 P		Printed order	
- Status received from Filling Florist:** A table with columns: Date, Florist Code, Status, Text.

Buttons at the bottom: Save, Show GPS, and Escape.

Ticket Area

This non-editable area contains the following information:

Table 9-27: Ticket Area Fields

Field	Description
Number	The ticket number (including the Sale ID).
Updated	The day, date, and time when the ticket was last updated.

Printed Area

This non-editable area contains the following information:

Table 9-28: Printed Area Fields

Field	Description
Copy #	The number of times the ticket has been printed.
Printer	The printer where the ticket was last printed.
Time	The last time the ticket was printed.

Designer Area

This non-editable area contains the following information:

Table 9-29: Designer Area Fields

Field	Description
Status	The current design status.
Date	The day, date, and time the ticket was assigned to a designer.
Designer	The designer assigned to the ticket. Designers are assigned in the Design Center.

The designer status is not updated until all products on the ticket have been assigned or designed.

Delivery Area

This area contains delivery details for the order.

Table 9-30: Delivery Area Fields

Field	Description
Status	The delivery status for the order.
Date	The order's delivery date.
Route	The order's route.
Driver	The route's driver.

Click the Edit button to change Delivery status.

Order Life Cycle Area

The Order Life Cycle area allows you to view details about the order. This area is divided into two lists: Local Status and Filling Florist Status. The most recent status change is recorded at the top of each list. Information in each list is read-only and cannot be edited.

NOTE It is possible to have multiple messages with the same status type. This can occur, for example, if an order is initially not delivered and then is put back on a truck and then successfully delivered. You would see an On Truck message, a Delivery Exception message, an On Truck message again, and then a Delivered message.

Local Status List

The local status list contains the following information for each order life cycle message:

Table 9-31: Local Status List Information

Column	Description
Filling Florist Date	The date and time the event took place. This is displayed in the filling florist's time, as opposed to your local time. For example, if you are in the Central time zone and you send a message at 1:00 PM CST to a florist in the Pacific time zone, they will see the order received at 11:00 AM PST.
Employee	The employee who performed a task that changed the status. Depending on the task, there may or may not be an employee associated with a status change.
Status	The event that triggered the message.

Table 9-31: Local Status List Information

Column	Description
Text	Any text for the event. Currently, this only displays the exception code for delivery exceptions (for example, Not at Home, Refused, etc.)

Filling Florist Status List

The Filling Florist Status List contains the following information for each order life cycle message:

Table 9-32:

Column	Description
Filling Florist Date	The date and time the event took place. This is displayed in the filling florist's time, as opposed to your local time.
Florist Code	The shop code for the filling florist.
Status	The event.
Text	Any text for the event. Currently, this only displays the exception code for delivery exceptions (for example, Not at Home, Refused, etc.)

Button Ribbon

The button ribbon at the bottom of the window contains the following buttons:

Table 9-33: Ticket Status Button Ribbon

Button	Description
Save	Saves any changes you made.
Show GPS	If you are licensed for Wireless Delivery with GPS, displays the current location of your driver.
Escape	Closes the window.

Delivery Information Window

Figure 9-21: Delivery Information Window

The screenshot shows a window titled "Delivery Information" with a close button (X) in the top right corner. The window contains a "Confirmation Detail" section with the following fields:

- Send Confirmation:**
- Template:** DeliveryConf (dropdown menu)
- Email Address:** bernicebutterworth@comcast.net

At the bottom of the window, there are two buttons: **Save** and **Escape**.

When you click the Delivery Confirmation button in the Delivery area of Order Entry or Point of Sale, the Delivery Information window opens. In this window, you can specify whether you want to send a delivery confirmation email message to a customer, the template to use for the confirmation, and the customer's email address.

Depending on settings for the customer (that is, if the Delivery Confirmation option is selected in the General tab of the Customer Detail Information window), the Send Confirmation option may be selected and the Email Address field may already be filled in when you open this window.

Table 9-34: Delivery Information Window Settings

Setting	Description
Send Confirmation	This box should be checked if the customer is set up to receive delivery confirmations (Delivery Confirmation is checked in the General tab of the Customer Detail Information window for the customer). If it is not checked and you would like to send a delivery confirmation email message, check this field. If the order is an incoming order and you check Send Confirmation , a delivery confirmation message will be sent to the sending florist when the order is marked delivered.
Template	The template that you selected as the default template for the given delivery type in Mercury Administration will display here. To select a different template, click the down arrow and select the email template you would like to use. Templates are maintained in the FTD Document Center.
Email Address	If the customer has an email address saved on his or her account, it will display here. Change or type the email address in this field if necessary. The email address you type here is only valid for the order; it will not be saved on the customer account.

NOTE The Delivery Confirmation button is only enabled when the zone is a deliverable zone (that is, not for carry out, pickup, or wire out orders).

Click Save to save your changes, or Escape to close the window without sending changes.

Map It Window

When you click the Map It button in Order Entry or Point of Sale, the Map It window opens. This window displays the recipient address and the distance in miles (or kilometers, for Canadian systems) from your shop to the recipient. It also provides a map showing your shop location and The Map It button is always enabled, but you may receive messages if you do not have required licenses or software.

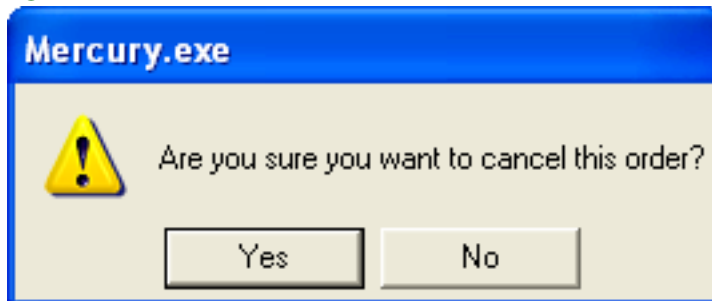
- » If you are not licensed for Address Verification, a message displays with information about purchasing a license.
- » If Microsoft MapPoint is not installed, a message displays with information about purchasing a MapPoint license.
- » If your zone is not a local zone, a message displays informing you that you must select a local zone.
- » If the location of your shop address listed in the Florist Directory cannot be verified, a message displays indicating you need to contact FTD Member Services to update the address.
- » If the recipient address cannot be verified (or you elected not to verify it), a message displays indicating you cannot use the Map It feature unless the address is verified.

Once you have finished viewing the information in this window, click Escape to close the window and return to Order Entry or Point of Sale.

TIP If you do not have MapPoint installed, as long as you have address verification and the location of your shop is verifiable in the Florist Directory, the distance between the verified recipient address and the current Transfer To store is displayed directly below the Map It button in Order Entry and Point of Sale.

Cancel Confirmation Window

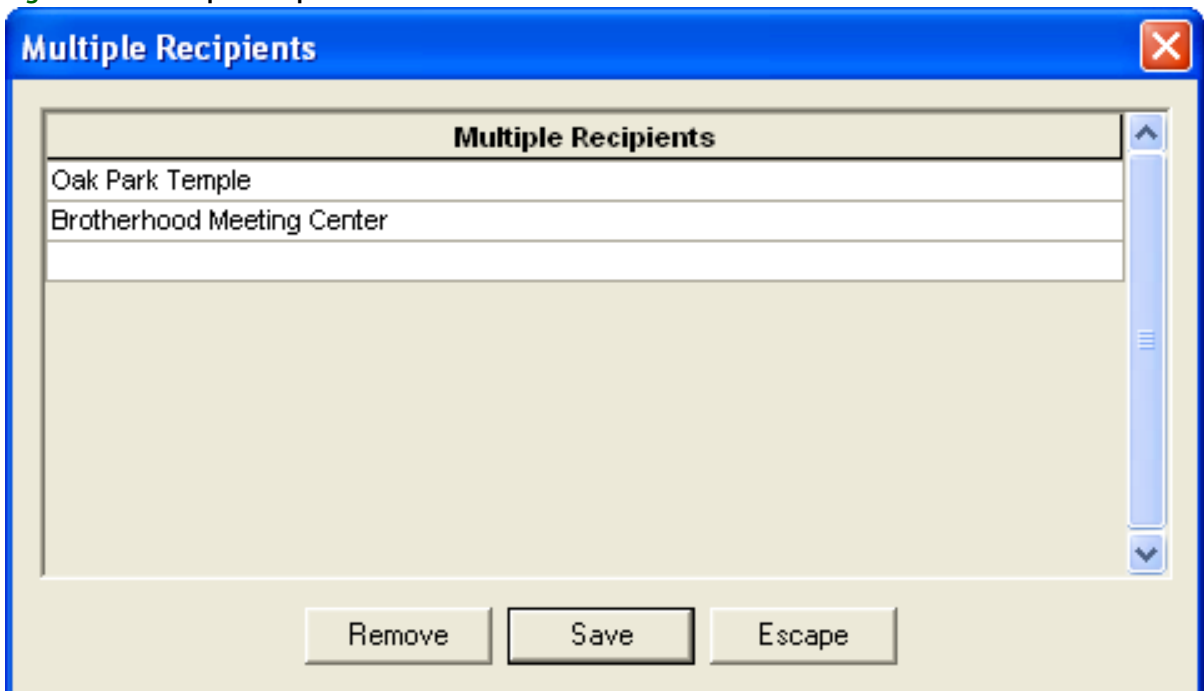
Figure 9-22: Cancel Confirmation Window



If you select to cancel an order in either the Order Entry window or Point of Sale window, a message will appear asking you to confirm the cancellation. Click Yes to cancel the order, or click No to return to the previous screen without canceling.

Multiple Recipients Window

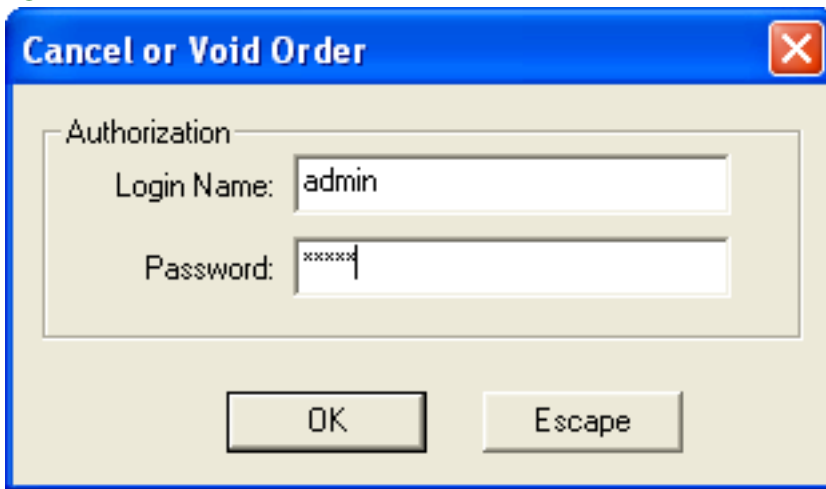
Figure 9-23: Multiple Recipients Window



The **Multiple Recipients** window allows you to send the same card to several recipients without having to retype the same card message. You may need to use this window within the **Order Entry** window when sending several recipients the same card.

Cancel or Void Order Window

Figure 9-24: Cancel or Void Order Window



Only authorized employees may perform cancels or voids. To confirm you are authorized, enter your login name and password, and click **OK** to continue.

Automated Order Interface

The Automated Order Interface allows you to receive orders from other wire services as incoming Mercury orders in FTD Mercury. Incoming orders from other wire services are automatically routed to FTD Mercury. You then process the order as you would process any other incoming Mercury order.

Contact Mercury Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com to purchase this feature.

Automatic Order Processing (AOP)

Using FTD Mercury, you can receive incoming orders from the Mercury Network, Florists Online (FOL), Flowers All Hours (FAH), and Web sites via the Web Order Interface (WOI). Most of these orders already contain all the information necessary to process the order; Automatic Order Processing (AOP) in FTD Mercury allows you to configure your system to handle these orders automatically if they contain all necessary information for processing. This saves you time, and allows you to focus on orders that cannot be processed automatically. Those orders are still available as usual via Attach Incoming.

For example, you may have a Web site that allows customers to place orders. If a customer places an order for a recipient outside of your delivery zones, AOP can automatically process the order and send the Mercury order to a filling florist where the recipient lives—without your intervention.

Automatic Order Processing is set up on a per-florist code level (that is, you can have different configurations for different shop codes if you are a multi-shop florist). You can configure AOP in the Automatic Order Processing screen in Mercury Administration.

IMPORTANT You must be processing credit cards over the Internet (via a high-speed connection) to use Automatic Order Processing.

Orders that have been processed automatically appear in the Message Center window with the order number assigned to them. Orders that cannot be processed automatically appear in the Message Center window and are included in the list when you open the Message Center from Order Entry or Point of Sale (search for messages requiring attention). Once Automatic Order Processing determines it cannot process an order automatically, it will not reattempt to process it automatically later.

Once an order has been automatically processed, it appears in the Ticket Search screen with other processed orders.

Outgoing Order Handling by Automatic Order Processing

Automatic order processing sends all identified outgoing orders over the Mercury Network. It automatically selects a florist in the recipient's city, using configured preferences in determining the florist. If a florist exists in the city that you have flagged as an First Choice florist, FTD Mercury will pick that florist. If no First Choice florist exists in that city, FTD Mercury will select a Preferred florist. If no Preferred florist exists in that city, FTD Mercury will attempt to use a florist you have used before. Otherwise, FTD Mercury will then pick a Normal florist. Under no circumstances will

FTD Mercury use a florist with a Not Preferred status—even if that is the only florist for the city. In this case, you will have to manually process the order.

If no florist exists for the city, FTD Mercury will choose a florist who also serves that city whenever possible. If there are no florists who serve that city and no other florists have an Also Serves status for that city, the order cannot be processed automatically.

When orders are automatically processed as outgoing orders, FTD Mercury always assigns a wire out zone. If no zone can be found for the address, FTD Mercury uses the default wire out zone. In this configuration, even if a local, pickup, or pool delivery zone is found for the address, FTD Mercury will still use the default wire out zone.

NOTE If you are using a Canadian system, and if the wire out zone cannot be found or the address is within a local zone, the order cannot be automatically processed.

All incoming Mercury orders as local orders. If an incoming Mercury order is received for an address within a wire out zone, the order cannot be processed automatically. All outgoing Mercury orders that are automatically processed are sent with the Auto Forward setting enabled.

Credit Card Payments and Automatic Order Processing

Flowers All Hours, Florist Online, and Web orders received with a credit card payment are automatically processed according to the automatic order processing rules defined in Mercury Administration. Only the credit card provided in the order will be used, regardless if whether the customer already has an account in FTD Mercury and has other credit cards on file.

If a credit card order is received and a customer does not exist in the FTD Mercury database, FTD Mercury handles new account creation under the following rules:

Table 10-1: How Automatic Order Processing Handles Account Creation and Processing Credit Cards

If the customer name is...	If the customer phone number is...	Create account?	Automatically process order?
The only match in the FTD Mercury database	Matched or unmatched	No	Yes
Not in the FTD Mercury database	Matched or unmatched	Yes	Yes
Matched by more than one name in the FTD Mercury database	A single match in the FTD Mercury database	No	Yes
Matched by more than one name in the FTD Mercury database	Not matched in the FTD Mercury database	No	No (you will have to manually process this order via Attach Incoming)
Matched by more than one name in the FTD Mercury database	Matched by more than one phone number in the FTD Mercury database	No	No (you will have to manually process this order via Attach Incoming)

If a credit card is declined or authorization is unsuccessful, the transaction will appear in the Unsettled Credit Card Authorizations window.

Orders received with the payment type of house charge will not be automatically processed, nor will orders with a payment type of COD. Incoming FTD Mercury orders will be processed as charges to the wire service house account.

Potential Issues that Prevent Automatic Order Processing

FTD Mercury cannot automatically process all orders if necessary information is missing or incomplete. Some examples of reasons why AOP cannot automatically process an order include:

- » Invalid or incomplete credit card information
- » No recipient
- » No recipient address
- » No product description
- » No product price
- » Outgoing order total less than or equal to zero dollars
- » No delivery zone found for address (unless processing all orders as outgoing)
- » Product amount is less than or equal to zero dollars
- » Payments with type of house charge or COD
- » Inconsistent tax rates between Web site and FTD Mercury

Automatic Order Processing Screen

The Automatic Order Processing screen in Mercury Administration allows you to configure settings for how FTD Mercury automatically handles incoming messages (Mercury orders, Flowers All Hours, Florists Online, and Web orders using the Web Order Interface).

IMPORTANT You can only use Automatic Order Processing if you process credit cards over the Internet, as opposed to processing them through a dial-up (modem) connection. If you are not configured to process credit cards over the Internet, the configurations on this screen will be disabled.

If an order cannot automatically be processed (because it lacks necessary information), you will have to attach the order manually in Order Entry or Point of Sale.

Figure 10-1: Automatic Order Processing Screen in Mercury Administration

Order Types	Local Orders	Outgoing Orders	All orders as Outgoing
Incoming Orders	<input checked="" type="checkbox"/>		
FAH Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FOL Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Web Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Apply Undo

Automatic order processing is defined on a per-store basis, meaning if you are configured as a multi-store system, you must configure settings for how each store handles order processing.

For each store, you need to configure how (and whether) FTD Mercury incoming orders, Flowers All Hours (FAH) orders, Florists Online (FOL) orders, and orders from your Web site (via the Web Order Interface) are processed. By default Automatic Order Processing is disabled. For each order type, all orders of that type will automatically be processed by the options you set.

- » **Local Orders**—When you select this option, FTD Mercury will automatically process local orders of the selected type. Incoming FTD Mercury orders can only be processed as local orders. If you select this option for an order type, the All Orders as Outgoing box will be cleared.
- » **Outgoing Orders**—When you select this option, FTD Mercury will automatically process outgoing orders of the selected type. If you select this option for an order type, the All Orders as Outgoing box will be cleared.
- » **All Orders as Outgoing**—When you select this option, all orders of the type you are configuring will be processed as outgoing orders. If you select this option, the Local Orders and Outgoing Orders boxes will be cleared.

If you want to disable automatic order processing in FTD Mercury for a particular order type, clear all check boxes for that order type. If you want to disable automatic order processing entirely, clear all check boxes in the order processing configuration grid.

NOTE If you have automatic order processing configured for your FOL site and you have either Outgoing Orders or All Orders as Outgoing selected, any WebGifts orders will automatically be sent to FTD without any intervention.

Accessing the Automatic Order Processing Screen

TASK To access the Automatic Order Processing Screen screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Wire Service** folder.
- 4 Double-click **Automatic Order Processing**. The **Automatic Order Processing** screen opens.

Configuring Automatic Order Processing

TASK To configure automatic order processing for a store:

- 1 In **Mercury Administration**, access the **Automatic Order Processing** screen.
- 2 From the store list, select the store for which you are configuring automatic order processing.
- 3 For each order type (**FTD Incoming**, **Flowers All Hours**, **Florists Online**, and **Web** orders), select how you want to handle the orders.
- 4 Click **Apply** to save your changes.

If you are configured as a multistore environment, select another store and repeat this process on a per-store basis.

Disabling Automatic Order Processing

You can disable automatic order processing for either particular order types or completely.

TASK To disable automatic order processing for a particular order type:

- 1 In **Mercury Administration**, access the **Automatic Order Processing** screen.
- 2 From the store list, select the store for which you want to change configurations.
- 3 For the order type for which you want to disable automatic order processing, clear the check boxes in the row so they are blank.
- 4 Click **Apply** to save your changes.

If you have multiple stores and want all stores to be configured the same way, repeat for each additional store.

TASK To disable automatic order processing for all order types:

- 1 In **Mercury Administration**, access the **Automatic Order Processing** screen.
- 2 From the store list, select the store for which you want to change configurations.
- 3 Clear all the check boxes in the **Automatic Order Processing** grid so they are all blank.
- 4 Click **Apply** to save your changes.

If you have multiple stores and want all stores to be configured the same way, repeat for each additional store.

Configuring AOP for Send-Only Florists

If you are a send-only florist, you can set up automatic order processing to send all orders you receive as outgoing Mercury orders.

TASK To configure AOP to send all orders received as outgoing Mercury orders:

- 1 In **Mercury Administration**, access the **Automatic Order Processing** screen.
- 2 Select the store for which you are configuring automatic order processing.
- 3 For FAH, FOL, and Web orders, select the **All orders as Outgoing** box.
- 4 Click **Apply**.
- 5 Repeat for any additional stores, if necessary.

FTD Mercury will automatically process all orders as outgoing for FAH, FOL, and Web orders via WOI. If any orders do not meet the criteria for being automatically processed, you will still need to manually process them by attaching the incoming orders. However, the vast majority of orders should be processed without your intervention.

Florists Online and Flowers All Hours Product Codes

FTD Mercury automatically updates products, fees, and taxes associated with FTD Mercury, Florists Online (FOL), Flowers All Hours (FAH), and Web Order Interface (WOI) orders before automatically processing the orders.

When orders are processed for Florists Online (FOL) and Flowers All Hours (FAH), you need to ensure product codes for delivery fees and other charges are set up the same way in FTD Mercury as FOL and FAH. For example, you may tax the delivery fee on your FOL site; to ensure the order is processed correctly, the delivery fee should be taxed in FTD Mercury as well.

NOTE When orders are received from FOL, FAH, or WOI, the delivery charge and service charges are used on the order instead of fees associated with the delivery zone.

There are several product codes in FTD Mercury associated with Automatic Order Processing and FOL/FAH orders. They are:

Table 10-2: FOL and FAH Product Codes

Product Code	Name	Type
SYS_ADD_ON	Add On	Product Amount
SYS_DELIVERY	Delivery	Delivery Charge
SYS_DISCOUNT	Discount	Coupon
SYS_PRODUCT	Product	Product Amount
SYS_RELAY	Relay	Relay Charge
SYS_RETRANS	Retrans	Relay Charge
SYS_SERVICE	Service	Service Charge

You should ensure these products are configured correctly for taxes and amounts so FAH and FOL orders are correct when processed using FTD Mercury.

Automatic Order Processing and the System Employee

When an order is automatically processed by **FTD Mercury**, the employee associated with the order is named **System**. When you view an order, if the **Employee** is **System**, the order was automatically processed.

IMPORTANT Do not remove or terminate the **System** employee in Mercury Administration.

Searching for Automatically Processed Orders

You can perform a **Ticket Search** by employee to locate all orders automatically processed by FTD Mercury.

TASK To search for orders automatically processed by FTD Mercury:

- 1 On the **FTD Mercury Main Menu**, in the Search area, click **Ticket**. The **Ticket Search** window opens.
- 2 Click the **Employee** tab.
- 3 In the text box, enter **System**.
- 4 Select the store you want to search in from the **Store Name** list.
- 5 If you want to restrict your search to a specific date:
 - a. Select the **Use Date in Search** check box.
 - b. Select whether you want to search by **Sale** date or by **Delivery** date.
 - c. Enter the date.
- 6 Click **Search**.

Orders that appear in the results list are ones that FTD Mercury automatically processed.

Managing Point of Sale Sessions

For the most part, Point of Sale is very similar to Order Entry, except that you can perform cash transactions and quick sales in Point of Sale, most often using Cash Sales as your customer rather than individual customer accounts. Order processing from Order Entry and Point of Sale are similar, which makes training your employees easy. The Point of Sale screen has similar navigation, and the configurations for abbreviation codes, delivery zones, and other efficiency configurations are the same as for Order Entry. Because of the similarities, you can find order processing information in the chapter [Working with Orders](#) on page 9–1. However, because Point of Sale involves working with a cash drawer, there are several specific configurations and operations that you can only perform in Point of Sale. Sections in this chapter cover those procedures and concepts.

Point of Sale Sessions

A Point of Sale session begins with setting an opening balance for the cash drawer and ends with a Z-Out transaction, which closes the cash drawer. You set the opening balance at the beginning of the day when you open your store, and perform a Z-Out transaction at the end of the day when you are ready to close the drawer. Consequently, a Point of Sale session usually consists of a single day's worth of transactions on a particular terminal. The session remains open until the Z-Out transaction is complete.

NOTE The Opening Balance button only appears when you have not yet entered an opening balance. When you have entered an opening balance for a Point of Sale session, the Opening Balance button is replaced by the X-Out/Z-Out button.

Each Point of Sale terminal has a separate session. The session records the time the opening balance was entered and the time the Z-Out was performed. You must specify an opening balance on each terminal, and must close each out with a Z-Out transaction.

Point of Sale sessions are used so that you can look up Point of Sale transactions using the POS Session History. Using the POS Session History, you can search for previous Point of Sale sessions and edit or review transactions and drawer totals for past sessions. See [Point of Sale History](#) on page 11–13 for more information on using the POS History.

Point of Sale Configurations

There are several configurations you need to perform to work with Point of Sale. These initial configurations are:

- » [Setting Up the Cash Drawer](#)
- » [Setting Employee-Level Security](#)

» [Setting Up Paid Out/In Types](#)

Setting Up the Cash Drawer

You can create default settings for Point of Sale in the POS Setting screen in Mercury Administration. For each pay type, you can specify the default the customer and whether you want the cash drawer to open. Initially, the default customer for all payment types is Cash Sales. Using the POS Setting screen, you can also enter a message that prints at the bottom of your receipts.

TASK To set up Point of Sale settings in Mercury Administration:

- 1 Access the **POS Setting** screen in Mercury Administration.
- 2 Set default behavior for each payment type. This includes whether to open the drawer when collecting payments, the default customer for each payment type, the number of signature receipts you want to print, and the message you want to display at the bottom of the receipt.
- 3 Click **Apply** to save your changes before exiting this screen.

Setting Employee-Level Security

Employee-level security can be set for Point of Sale functions only. This feature allows you to set up separate Point of Sale security settings for each employee. These settings can be set in addition to what you have set for the employee's job function.

NOTE Job function-level security overrides employee-level security.

To learn how to set employee-level security for Point of Sale, see [Setting Employee-Level Security](#) on page 6–7.

Setting Up Paid Out/In Types

Paid out and paid in types are reasons why cash must be added to or removed from the cash register drawer in Point of Sale. For example, you may have to use the paid out function to take cash out of the drawer to pay for gas for the delivery truck, or pay for candy or fruit for gift baskets. The paid in function is then commonly used to return change to the cash drawer.

In order to use the paid out/in function, you must first specify Paid Out/In Types, which describe the reason for the paid out/in transaction.

NOTE For more information on paid out/in types, see [Paid Out/In Types Screen](#) on page 24–76.

TASK To configure paid out and paid in types for use in Point of Sale:

- 1 Access the **Paid Out/In Types** screen in **Mercury Administration**.
The paid out and paid in types that you enter here display in Point of Sale in a drop down field when you do a paid out/in. You will select the paid out/in type and enter a dollar amount to complete the transaction.
- 2 Add new paid out/in types, or remove or rename existing ones.

NOTE You cannot remove a Paid In or Paid Out type that has already been used.

- 3 Click **Apply** to save your changes before exiting this screen.

Adding a Paid Out or Paid In Type

TASK To add a paid out or paid in type:

- 1 Access the **Paid Out/In Types** screen in **Mercury Administration**.
- 2 In the top text box, enter the paid out/in type you are adding and click **Add**.
- 3 Click **Apply** to save your changes before exiting this screen.

Removing an Existing Paid Out or Paid In Type

IMPORTANT You cannot remove paid out or paid in type if a GL account has been created for that paid out/in type in the Chart of Accounts Wizard.

TASK To remove an existing paid out or paid in type:

- 1 Access the **Paid Out/In Types** screen in **Mercury Administration**.
- 2 From this list of existing paid out and paid in types, select the type you want to remove and click **Remove**.

NOTE You cannot remove a paid in or paid out type that has been used in FTD Mercury.

- 3 Click **Apply** to save your changes before exiting this screen.

Renaming a Paid Out/In Type

You cannot rename a paid out or paid in type if a GL account has been created for that paid out/in type in the Chart of Accounts Wizard.

TASK To remove an existing paid out or paid in type:

- 1 Access the **Paid Out/In Types** screen in **Mercury Administration**.
- 2 From this list of existing paid out and paid in types, select the type you want to rename and click **Rename**.
- 3 In the text box, change the name to the new name you want to use.
- 4 Click **Apply** to save your changes before exiting this screen.

Managing the Cash Drawer

By default, all employees are allowed to perform all types Point of Sale transactions. You can authorize employees for certain transactions by setting the employee-level security in Mercury Administration. See [Setting Employee-Level Security](#) on page 11-2 for more information on security settings.

Cash Drawer Tasks

- » [Setting the Opening Balance](#)
- » [Processing a No Sale Transaction](#)
- » [Processing a Paid Out or Paid In Transaction](#)
- » [Processing a Z-Out Transaction](#)
- » [Processing an X-Out Transaction](#)

Setting the Opening Balance

Before beginning a Point of Sale session, you must enter an opening balance. You may enter the opening balance immediately after a Z-Out, when the Opening Balance window opens, or you can access the window by clicking the Opening Balance button on the Point of Sale screen. FTD Mercury uses the opening balance at the time of Z-Out to calculate the amount of overage or underage in the drawer.

NOTE The Opening Balance button only appears when you have not yet entered an opening balance. When you have entered an opening balance for a Point of Sale session, the Opening Balance button is replaced by the X-Out/Z-Out button.

TASK To set the opening balance:

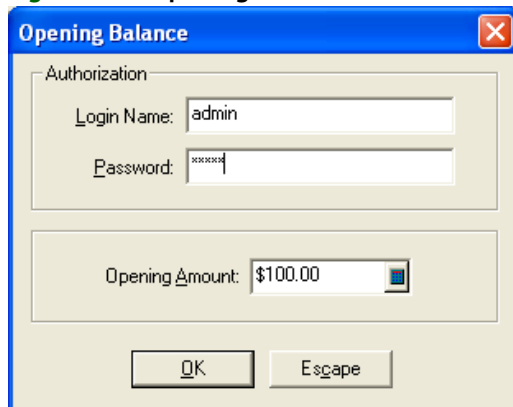
- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**.
- 2 Click **Opening Balance** to display the **Opening Balance** window.
- 3 In the **Login Name** field, enter your FTD Mercury login name.
- 4 In the **Password** field, enter your FTD Mercury password. Asterisks (*****) appear to protect your password.
- 5 In the **Opening Amount** field, enter the opening balance for the drawer (the amount shown defaults to the previous opening balance amount).
- 6 Click **OK** when you are finished. The receipt printer prints a record of the opening balance.

Once the Point of Sale session has been opened, the Opening Balance button changes to the X-Out/Z-Out button.

Opening Balance Window

This window opens when you click Opening Balance in the main Point of Sale screen. Before beginning a Point of Sale session, you must enter an opening balance. The FTD Mercury system will use the opening balance at the time of Z-Out to calculate the amount of overage or underage in the drawer.

Figure 11-1: Opening Balance Window



Enter your login name and password for authorization, and then enter the opening balance for the drawer.

Once the Point of Sale session has been opened, the Opening Balance button changes to the X-Out/Z-Out button.

Processing a No Sale Transaction

No sale transactions allow you to open the cash drawer without changing the amount of money in the drawer. One common reason to do this is to make change for a customer.

TASK To process a no sale transaction:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**.
- 2 Click the **No Sale** button to open the **No Sale** window.
- 3 In the **Login Name** field, enter your FTD Mercury login name.
- 4 In the **Password** field, enter your FTD Mercury password. Asterisks (*****) appear to protect your password.
- 5 Click **OK** to complete the transaction. The cash drawer opens, and the receipt printer prints a record of the no sale transaction.

No Sale Window

The No Sale window opens when you perform a no sale transaction in Point of Sale. It requires you enter your login name and password. If you are permitted to perform a no sale transaction, the cash drawer will open. The purpose of a No Sale transaction is to open the cash drawer without taking any money out or putting any money in, for example to make change for a customer.

No Sale Window

Processing a Paid Out or Paid In Transaction

Paid out and paid in transactions are used to take money out of or put money into the cash drawer for transactions that are not sales. For example, you may have to remove money from the drawer to pay a window washer or buy gas for the delivery truck.

NOTE You cannot process a paid out/in unless you have already set up paid out/in types in Mercury Administration. See [Setting Up Paid Out/In Types](#) on page 11-2 for instructions.

TASK **To process a paid out or paid in transaction:**

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**.
- 2 Click **Paid Out/In** to open the **Paid Out/In** window:
- 3 In the **Login Name** field, enter your FTD Mercury login name.
- 4 In the **Password** field, enter your FTD Mercury password. Asterisks (*****) appear to protect your password.
- 5 Click **Paid Out** if you are taking money out of the cash drawer or click **Paid In** if you are putting money into the cash drawer.
- 6 From the **Type** list, select the paid out/in type.
- 7 In the **Amount** field, enter the transaction amount.
- 8 Click **Save** to complete the transaction, or click **Escape** to cancel the transaction. When you click **Save**, the receipt printer prints a record of the transaction.

Paid Out/In Window

In the Paid Out/In window, you enter transactions that require you to take money out of and put money into the cash drawer that are not from sales. For example, you may have to use money from the drawer to buy fuel for a delivery truck.

U.S. Shops

For shops configured as U.S., the window contains the following settings:

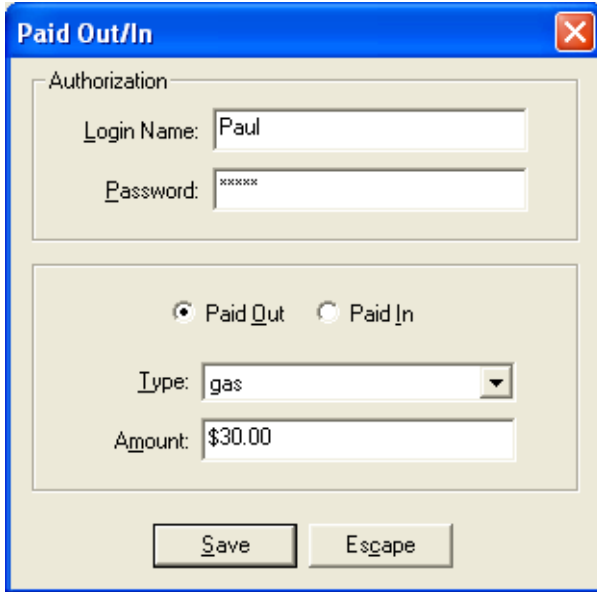
Table 11-1: U.S. Paid Out/In Window Settings

Setting	Description
Login Name	Enter your FTD Mercury login name.

Table 11-1: U.S. Paid Out/In Window Settings (cont.)

Setting	Description
Password	Enter your FTD Mercury password. Asterisks (*****) appear to protect your password.
Paid Out or Paid In	Select Paid Out if you are taking money out of the cash drawer; select Paid In if you are putting money into the cash drawer.
Type	Click the arrow and select the paid out/in type. Valid types are defined in Mercury Administration.
Amount	Enter the amount of the transaction.

Figure 11-2: Paid Out/In Window for U.S. Shops



Canadian Shops

Shops that are configured as Canadian have slightly different settings. When reporting GST/HST tax, you may claim an input tax credit for the GST taxes paid on business-related expenses. When you enter a paid out transaction, the amount of GST tax you enter is included on the sales tax report as an input tax credit. Taxes are reported on the Canadian Sales Tax Report in the column defined as Federal Tax.

Table 11-2: Canadian Paid Out/In Window Settings

Setting	Description
Login Name	Enter your FTD Mercury login name.
Password	Enter your FTD Mercury password. Asterisks (*****) appear to protect your password.
Paid Out or Paid In	Select Paid Out if you are taking money out of the cash drawer; select Paid In if you are putting money into the cash drawer.
Type	Click the arrow and select the paid out/in type. Valid types are defined in Mercury Administration.
Amount	Enter the amount of the transaction.

Table 11-2: Canadian Paid Out/In Window Settings (cont.)

Setting	Description
Federal Tax	<p>Note: The federal tax will be labeled with the same name as the value set for the Federal Tax Label in the Tax Code screen in Mercury Administration. This typically is GST or HST.</p> <p>Enter the amount of federal tax you are claiming as an input credit on this paid out transaction. This will appear in the input tax section of the sales tax report.</p>
Provincial Tax	<p>Note: This field will be named the same as the value set for the Provincial Tax Label in the Tax Code screen in Mercury Administration.</p> <p>Enter the amount of provincial tax you are claiming as an input credit on this paid out transaction. This value is included in the journal entry for the paid out expense as defined by the type.</p>
Total Amount	The total amount is the sum of the amount, federal tax, and provincial tax. This is automatically calculated for you and is display only.

When you print a receipt for the paid out/in, the receipt includes the amount of the item, the federal tax, provincial tax, and the total amount.

Figure 11-3: Paid Out/In Window for Canadian Shops

The screenshot shows a software window titled "Paid Out/In". It features an "Authorization" section with a "Login Name" field containing "admin" and a "Password" field with masked characters "xxxxxx". Below this, there are two radio buttons: "Paid Out" (which is selected) and "Paid In". A "Type" dropdown menu is set to "Fruit/Gourmet". There are four input fields for monetary values: "Amount", "Sales Tax", "Provincial Tax", and "Total Amount", all of which currently display "\$ 0.00". At the bottom of the window, there are two buttons labeled "Save" and "Escape".

Z-Out Transactions

A Z-Out transaction is a Point of Sale transaction that closes out the current Point of Sale session on the system. Also known as an end of day transaction, it is usually performed at the end of each day.

When you perform a Z-Out transaction on a Point of Sale system, the Point of Sale session closes and the Point of Sale system prints out totals for all completed transactions. You can then use the totals to balance the cash drawer. A summary or detail receipt then prints, summarizing the cash drawer activity for the session. Point of Sale transactions are not exported through General Ledger Export until the session has been closed.

NOTE When performing a Z-Out transaction, FTD Mercury automatically performs an X-Out transaction first. For more information, see [X-Out Transactions](#) on page 11–12.

Point of Sale Session Scenarios for Z-Out Transactions

Typically, you perform a Z-Out at the end of the day. However, you may need to close the session early because you want to empty the cash drawer for a bank deposit, or you may want to close the session the morning of the next day. Some florists even want to keep the session open for several days at a time, and then want to Z-Out at the end of the week. FTD Mercury provides flexibility for closing the Point of Sale session so the sales are recorded on the day you want them to be based on your business. When you close a session using a Z-Out, you are able to specify the date of the Z-Out session.

Typical Point of Sale Session Scenario

Point of Sale sessions always begin with setting the opening balance. You can either do this when you close the previous session, or you can do this when you open the register at the beginning of a day. In either case, when you set the opening balance, you are performing a transaction which records the amount of money the cash drawer had when you opened the session.

Over the course of the day, as your customers place orders, pay you, you pay for things, etc., the Point of Sale session is recording each transaction. If you want to see everything up to that point, but not close the session, you can perform an X-Out transaction (by clicking the X-Out/Z-Out button in the Point of Sale window).

At the end of the day, after you have finished with all of your orders and no longer will be accepting any payments through the cash drawer, you Z-Out the drawer. You then get a summary of all transactions performed during the day (the Z-Out amount). This is what FTD Mercury has recorded as the total amount that should be in the drawer. You can then count the drawer (with or without the Money Counter), and record the amount of cash and checks/other payments in the drawer. You can then see whether your count is right on, over, or under the anticipated amount. Once you have solved any overages or underages (usually by recording a missing transaction), you can then finish the Z-Out and close the session. At this point, you can also specify the opening balance for the next session. Afterward, you can prepare your bank deposit.

Alternative Z-Out Scenario #1

It is possible that your Point of Sale sessions may not follow the typical situation. One example of this is if you close your session before the end of the day using a Z-Out transaction. This can happen if your bookkeeper performs the Z-Out and leaves with the bank deposit at 4:00 P.M. and your shop stays open until 5:00 P.M. You may still get orders in that last hour of the day.

When your bookkeeper closes the Point of Sale session, she will enter an opening balance for the next session and begin the new session. The session starts immediately, and any subsequent transactions will be included in the new session, even if it spans multiple calendar days. In reports and accounting, FTD Mercury records transactions by the Point of Sale session in which they occur.

Alternative Z-Out Scenario #2

Another alternative scenario is if you want to have a Point of Sale session last multiple days. When you perform a Z-Out, you set the date to the current date. For accounting purposes (in the Balance Wizard and associated reports), FTD Mercury records the sales as have occurred on the Z-Out date. However, the orders can still be looked up via Ticket Search by the date they were placed.

As a further variation, if you have left the Point of Sale session open multiple days, you can also Z-Out for each day (breaking the single session into multiple sessions). When you perform the Z-Out, set the date to the earliest date, and then set the opening balance to the next date. Repeat for each date you want to use as a session (always Z-Out from the earliest possible date to the latest). For

each day you Z-Out when splitting a single session into multiple Point of Sale sessions, all sales from the opening balance to 11:59:59 P.M. are recorded on the Z-Out date. You will have a large overage on the first date, but you can continue and set the new opening balance, and then repeat subsequent days.

Processing a Z-Out Transaction

The Z-Out transaction closes the Point of Sale session and prints out totals for all completed transactions. You can then use the totals to balance the drawer. A summary or detail receipt then prints, summarizing the cash drawer activity for the day. Point of Sale transactions are not exported through General Ledger Export until the session has been closed.

NOTE When you click Z-Out, FTD Mercury automatically performs an X-Out transaction first, printing the X-Out report on the receipt. For more information, see [X-Out Transactions](#) on page 11-12.

TASK To process a Z-Out transaction:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**.
- 2 Click **X-Out/Z-Out**. The **Z-Out** window opens.
- 3 In the **Login Name** field, enter your FTD Mercury login name.
- 4 In the **Password** field, enter your FTD Mercury password. Asterisks (*****) appear to protect your password.
- 5 Select **Summary** to print a summary of the Point of Sale transactions for the session, or select **Detail** to print a receipt for every transaction performed, starting with and including the opening balance transaction.
- 6 In the **Z-Out Date** field, enter the date for the Z-Out. In most cases, it will either be the current date or the date of the previous business day. You cannot set it to a date prior to the opening balance date of the session.
- 7 Click **Z-Out** to print the receipt report (at this point, you are performing an X-Out). This portion of the Z-Out processes and then the Z-Out amount displays in the **Z-Out Amount** field.
- 8 If you want to count the cash drawer and enter cash and check amounts, select the **Count Drawer** check box. You may enter the cash and check amounts manually, or you may click the **dollar sign** button to use the **Money Counter** window to help calculate the totals.
- 9 If you are using the Money Counter:
 - a. In the **Coins** area, enter quantities for each type of coin in the drawer.
 - b. In the **Dollars** area, enter quantities for each type of bill in the drawer.
 - c. In the **Checks/Other (Cheques/Other for Canadian shops)** area, enter the amount for each check or gift certificate in the drawer. For Canadian shops, if the cheque or other amount is in U.S. funds, change the **Exchange** indicator to **US** so that funds are properly converted for your totals (the exchange rate used is set in the **US Exchange Rate** field in the **Store Settings** screen in Mercury Administration).

NOTE The Grand Total for Canadian shops displays in Canadian funds; if you specified that some funds in the Checks/Other section were in U.S. dollars, these values are converted to Canadian dollars.

- d. Click **Save** to save the drawer totals and return to the **Z-Out** window, click **Clear** to clear all the money counter fields and start over, or click **Escape** to cancel the counting and return to the **Z-Out** window.

NOTE When you click **Save**, the cash and check amounts display in the **Z-Out** window. Values that you enter in the **Money Counter** are available only until you leave the **Z-Out** window.

- 10 Click **Save** to complete the Z-Out and close the Point of Sale session. When you click **Save**, the actual Z-Out happens. Prior to this point, if you click **Escape**, you have only performed an X-Out transaction. After you click **Save**, the **Opening Balance** window opens. You can enter the

opening balance right away, or you can click **Escape** and enter the opening balance at a later time.

NOTE You must enter an opening balance before you can begin the next Point of Sale session.

Z-Out Window

The **Z-Out** window opens when you perform an X-Out or a Z-Out transaction. The Z-Out window contains the following fields and settings:

Table 11-3: Z-Out Window Fields and Settings

Field/Setting	Description
Login Name	Enter your FTD Mercury login name.
Password	Enter your FTD Mercury password. Asterisks (*****) appear to protect your password.
Count Drawer	Select this check box if you want to count the drawer and enter cash and check amounts. You may either enter the cash and check amounts manually, or you can click the Dollar Sign button to open the Money Counter window.
Z-Out Date	Enter the date for the Z-Out. By default, this is the current system date; you can set this date to any date from the opening balance date up to and including the current date.
Z-Out Amount	When you click Z-Out, this field displays the amount of money FTD Mercury recorded for sales during the Point of Sale session.
Cash Amount	If you are not using the Money Counter window, enter the cash amount from the drawer. If you are using the Money Counter, this field will be filled in with the totals from the Money Counter.
Check (Cheque) Amount	If you are not using the Money Counter window, enter the check amount from the drawer. If you are using the Money Counter, this field will be filled in with the totals from the Money Counter.
Dollar Sign	Click this button to open the Money Counter window, which can help you calculate totals for the drawer.
Over/Under	This value is automatically calculated based on the Z-Out amount and the cash and check amounts either you entered or you used the Money Counter to calculate.
Receipt Report	Select whether you want to print a summary report or a detail report for the Z-Out. The detail report prints a receipt for every transaction performed in the Point of Sale session, starting with the opening balance.

Click the **Z-Out** button to print the selected report and display the **Z-Out** amount in the **Z-Out Amount** field. Once you have performed the Z-Out, the **Z-Out** button changes to a **Save** button, which allows you to close the session. When you close the session, the **Opening Balance** window opens, allowing you to enter the opening balance for the drawer right away. You can also enter the opening balance at another time, but you must enter an opening balance prior to beginning the next Point of Sale session.

You can also click X-Out to perform an X-Out transaction (as opposed to a Z-Out, which closes the session). For more information, see [X-Out Transactions](#) on page 11-12.

Figure 11-4: Z-Out Window

If you click **Escape** to close the window instead of clicking **Z-Out**, the window closes but the current Point of Sale session remains open.

Money Counter Window

The **Money Counter** window assists you in calculating the totals for cash and checks when counting the drawer. You can enter the number of coins and bills you have of each type, and the **Money Counter** window will calculate how much money you have. You can also enter the amounts for each check or gift certificate you have in the drawer. When you click **Save**, you return to the **Z-Out** window, and the **Cash Amount** and **Check Amount** fields are populated.

NOTE

For Canadian systems, the **Money Counter** supports two dollar coins (“Toonies”). Additionally, in the **Cheques/Other** section, you can select if the cheque or other currency is in U.S. dollars. If it is, the amount will be converted to Canadian currency for the **Grand Total** on this screen using the **US Exchange Rate** in the **Store Settings** screen in **Mercury Administration**.

Figure 11-5: Money Counter Window (U.S.)

Money Counter

Z-Out Date: 02/18/2003 Z-Out Amount: \$653.53

Coins		
	Quantity	Amount
Pennies:	48	\$0.48
Nickels:	43	\$2.15
Dimes:	38	\$3.80
Quarters:	49	\$12.25
Half Dollars:	0	\$0.00
Dollars:	5	\$5.00

Dollars		
	Quantity	Amount
Ones:	21	\$21.00
Twos:	0	\$0.00
Fives:	5	\$25.00
Tens:	9	\$90.00
Twenties:	14	\$280.00
Fifties:	1	\$50.00
Hundreds:	1	\$100.00

Checks/Other	
	\$ 63.85
	\$ 0.00

Cash Total: \$589.68 Check Total: \$63.85
 Over/Under: \$0.00 Grand Total: \$653.53

Save Clear Escape

Figure 11-6: Money Counter Window (Canadian)

Money Counter

Z-Out Date: 07/20/2006 Z-Out Amount: \$912.93

Coins		
	Quantity	Amount
Pennies:	44	\$0.44
Nickels:	8	\$0.40
Dimes:	9	\$0.90
Quarters:	7	\$1.75
Dollars:	12	\$12.00
Two Dollars:	23	\$46.00

Dollars		
	Quantity	Amount
Ones:	0	\$0.00
Twos:	0	\$0.00
Fives:	16	\$80.00
Tens:	11	\$110.00
Twenties:	27	\$540.00
Fifties:	0	\$0.00
Hundreds:	0	\$0.00

Cheques/Other	
	\$ 50.00 US
	\$ 44.32 CAN
	\$ 17.12 CAN
	\$ 0.00 CAN

Cash Total: \$791.49 Cheque Total: \$121.44
 Over/Under: \$0.00 Grand Total: \$912.93

Save Clear Escape

X-Out Transactions

Similar to a Z-Out transaction, an X-Out transaction prints the same summary or detail information when complete. However, unlike a Z-Out transaction, an X-Out transaction does not close the Point of Sale session. For that reason, it does not request an opening balance when complete.

NOTE When performing a Z-Out transaction, FTD Mercury automatically performs an X-Out transaction first. For more information, see [Z-Out Transactions](#) on page 11-7.

Processing an X-Out Transaction

TASK To process an x-out transaction:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**.
- 2 Click **X-Out/Z-Out**. The **Z-Out** window opens.
- 3 In the **Login Name** field, enter your FTD Mercury login name.
- 4 In the **Password** field, enter your FTD Mercury password. Asterisks (*****) appear to protect your password.
- 5 In the **Z-Out Date** field, enter the date for which you want to perform the X-Out.
- 6 Select **Summary** to print a summary of the Point of Sale transactions for the session, or select **Detail** to print a receipt for every transaction performed, starting with and including the opening balance transaction.
- 7 Click **X-Out** to print the receipt report, or click **Escape** to cancel the transaction.

Point of Sale History

Point of Sale History is a search tool that allows you to look up previous Point of Sale sessions. From this screen you can view detail information for a Point of Sale session and enter drawer amounts.

Opening Point of Sale History

TASK To access point of sale history:

- 1 On the **Management** menu, click **POS Session History**.
- 2 Enter your search criteria by either selecting a date range or clicking **Session ID** and entering a session ID in the **ID** field (session IDs are printed on the Z-Out receipt).
- 3 Click **Search**. A list of available Point of Sale sessions appears.
- 4 Double-click on the session you want to review to open the **POS Session Detail** window.

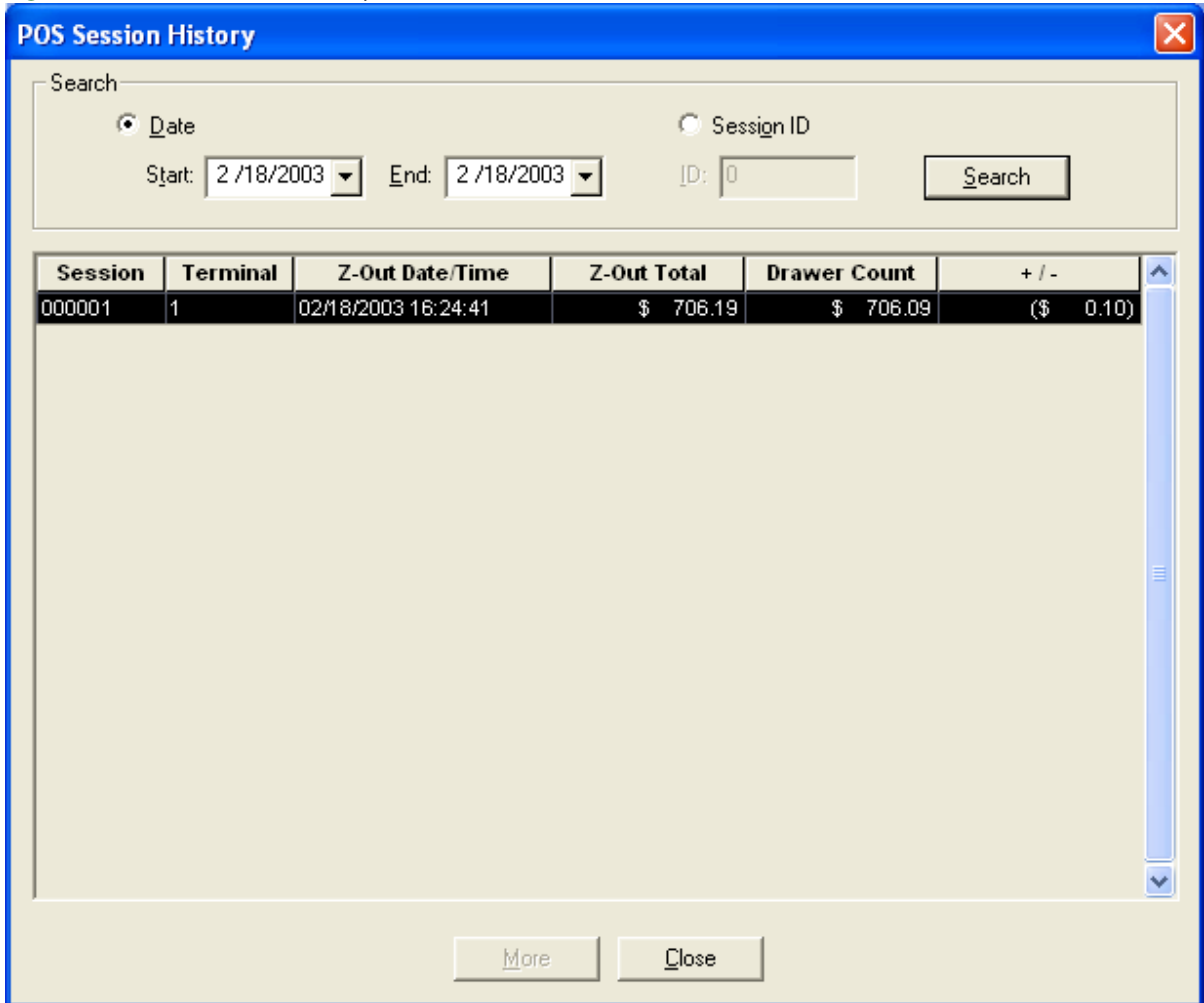
POS Session History Window

Using the **POS Session History** window, you can look up previous Point of Sale sessions. From this window, you can view detailed information for a Point of Sale session and enter drawer amounts.

Enter either the date range for which you want to search, or the Session ID for the Point of Sale session you are looking up.

The **POS Session History** window displays the session number, terminal id, Z-Out date and time, Z-Out total, drawer count, and amount over or under. (If the drawer count is under, the amount appears in parentheses.) Double-click on an individual session to access the **Point of Sale Session Detail** screen, where you can view or update drawer amounts in the session that you select.

Figure 11-7: POS Session History Window



Using the POS Session Detail

You can open the **POS Session Detail** window by double-clicking on a Point of Sale session in the **POS Session History** window. This window displays a summary list of transactions for the selected session, and it allows you to enter a drawer amount for a Point of Sale session after the session has been closed (using a Z-Out transaction).

View or print the session information as necessary. You can also change or enter the dollar amounts in the **Cash Amount** and **Check Amount** fields, which calculate the **Over/Under** amounts automatically. To help count the cash or checks, click on the dollar sign button to access the **Money Counter**. See [Money Counter Window](#) on page 11-11 for more information.

POS Session Detail Window

The **Point of Sale Session Detail** window is accessed by double-clicking on a Point of Sale session in the **POS Session History** window. This window displays a summary list of transactions for the selected session, and it allows you to enter a drawer amount for a Point of Sale session after the session has been closed (Z-Out).

You can view or print the session information as necessary, including changing the dollar amounts for the **Cash Amount** and **Check Amount** fields. You can also access the **Money Counter** window by clicking the dollar sign button.

Figure 11-8: POS Session Detail Window

POS Session Detail

POS Session ID: 13 Opening Amount: \$500.00

Terminal ID: 2 Z-Out Amount: \$692.82

Date/Time Opened: Thursday, March 20, 2008 15:23:23 PM Cash Amount: \$692.82

Date/Time Closed: Thursday, April 03, 2008 08:39:04 AM Check Amount: \$0.00

Z-Out Report: Summary Detail Over/Under: \$0.00

Transactions

Sale	Description	Employee	Cash Amount	Check Amount	Total Amount
	Opening Balance	Administrator	\$ 0.00	\$ 0.00	\$ 0.00
000394	Sale	Administrator	\$ 53.25	\$ 0.00	\$ 53.25
000395	Sale	Administrator	\$ 26.63	\$ 0.00	\$ 26.63
000395	Cancel	Administrator	(\$ 26.63)	\$ 0.00	(\$ 26.63)
000396	Sale	Administrator	\$ 13.89	\$ 0.00	\$ 13.89
000397	Sale	Administrator	\$ 26.63	\$ 0.00	\$ 26.63
000398	Sale	Administrator	\$ 5.98	\$ 0.00	\$ 5.98
000402	Sale	Administrator	\$ 0.00	\$ 0.00	\$ 0.00
000403	Sale	Administrator	\$ 21.30	\$ 0.00	\$ 21.30
000405	Sale	Administrator	\$ 6.30	\$ 0.00	\$ 6.30
000406	Sale	Administrator	\$ 53.25	\$ 0.00	\$ 53.25
000407	Sale	Administrator	\$ 26.63	\$ 0.00	\$ 26.63
000407	Cancel	Administrator	(\$ 26.63)	\$ 0.00	(\$ 26.63)
000408	Sale	Administrator	\$ 85.19	\$ 0.00	\$ 85.19
000408	Cancel	Administrator	(\$ 85.19)	\$ 0.00	(\$ 85.19)
000405	Cancel	Administrator	(\$ 6.30)	\$ 0.00	(\$ 6.30)
000409	Sale	Administrator	(\$ 5.98)	\$ 0.00	(\$ 5.98)

More Print Save Print Z-Out Escape

POS Manual Entry Window

Figure 11-9: POS Manual Entry Window

Tax Code	Tax Amount	Total
IL Sales Tax	\$ 0.00	\$ 0.00
Tax Exempt	\$ 0.00	\$ 0.00
Cash Sales	\$ 0.00	\$ 0.00
Interstate Commerce	\$ 0.00	\$ 0.00
Not Applicable	\$ 0.00	\$ 0.00
No Tax	\$ 0.00	\$ 0.00

The **POS Manual Entry** window allows you to enter the tax information from orders placed outside your FTD Mercury program. You will need to complete this process on a daily basis in order to generate your **Sales Tax Report** correctly.

TASK To enter tax information in the POS Manual Entry window:

- 1 On the **Management** menu, click **POS Sales Entry**.
- 2 Your store name is listed by default in the **Store Name** field. If you have multiple stores, click the down arrow and select the name of the store for which you wish to enter taxes manually.
- 3 In the **Date** field, click the down arrow to reveal a calendar. Click on the date you wish to enter or view taxes. Sales that have not been posted can be changed. Sales that have been posted appear in gray and cannot be changed.
- 4 In the **Total** field, type the total amount of sales that can be assessed under each tax type. You may click on the \$0.00 in the **Total** cells to reveal a calculator icon to help you compute the correct total to which you may apply each tax type.
- 5 In the **Tax Amount** field, type the amount of tax to be charged on the sales total in the cell to the right. You may click on the \$0.00 in the **Tax Amount** cells to reveal a calculator icon to help you compute the tax amount for each tax type.
- 6 Click the **Batch Mode** check box so a check mark appears if you wish to create several manual tax entries.
- 7 Click **Save**.

POS Registration Window

This window opens when FTD Mercury is unable to match your Point of Sale registration to one on file. Highlight an existing registration and click **Select** to use a previously created registration, or click **Add** to add a new registration based on your current settings.

Reprinting Receipts

Receipts print based on settings in Mercury Administration. However, you may need to reprint receipts in Point of Sale for a variety of reasons. You can reprint receipts for Point of Sale or Order Entry by performing a **Ticket Search**, highlighting the ticket, and clicking **Output Invoice**. You can only reprint receipts on a system that is configured for Point of Sale and has a receipt printer.

TASK To reprint a receipt via Ticket Search:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. The **Ticket Search** window opens.
- 2 Perform a **Ticket Search** to locate the ticket.
- 3 Click on or highlight the ticket you want to reprint and click **Output Invoice**. The **Output Options** window opens.
- 4 Ensure the **Print Receipt** check box is selected, and the **Print Invoice** check box is cleared.
- 5 Click **Execute**.

FTD Mercury reprints the receipt on the receipt printer. Receipts reprinted for Point of Sale transactions have the original session ID and terminal ID printed on them, with the word **REPRINT** at the bottom of the receipt. The print date and time will be the system time the receipt was reprinted.

Figure 11-10: Reprinted Receipt

Doc's Blooms		
3113 Woodcreek Drive		
Downers Grove, IL		
60515		
Date: 01/13/2007		
Time: 02:34:04 PM		
Rob Smith		
Order Number: 34		
Qty	Description	Price
1	FTD Pick Me Up Bouquet	\$ 39.99
Sub Total: \$		39.99
Sales Tax: \$		2.90
Total Amount Due: \$		42.89
Cash Tendered: \$		50.00
Change Due: \$		7.11
Print Date: 01/26/2007		
Print Time: 11:59:12 AM		
REPRINT		

Design Center

If you have a shop with more than one designer, it is to your advantage to assign designers to products so that you know who is responsible for each item to be produced. Tracking which products have been designed and which haven't is also useful if you are using Mercury Delivery, because you can quickly see which products are ready to be delivered.

FTD Mercury provides the Design Center window to easily assign designers to products and to track the status of each item to be designed. You can also use the Design Center window to sort orders that are in the design phase by delivery zones or by priority, to ensure that the orders that have to be delivered first are designed first.

NOTE FTD Mercury allows you to assign products for design to any employee. However, you may wish to designate certain employees as designers in Mercury Administration by assigning them to the Designer job category. For more information, see [Adding Employees](#) on page 6–1.

Opening the Design Center Window

IMPORTANT Window Access for your role in Mercury Administration must allow you to use the Design Center window.

TASK **To open the Design Center window:**

On the **FTD Mercury Main Menu**, click **Designer**. Alternatively, on the **Tools** menu, click **Designer**. The **Design Center** window opens.

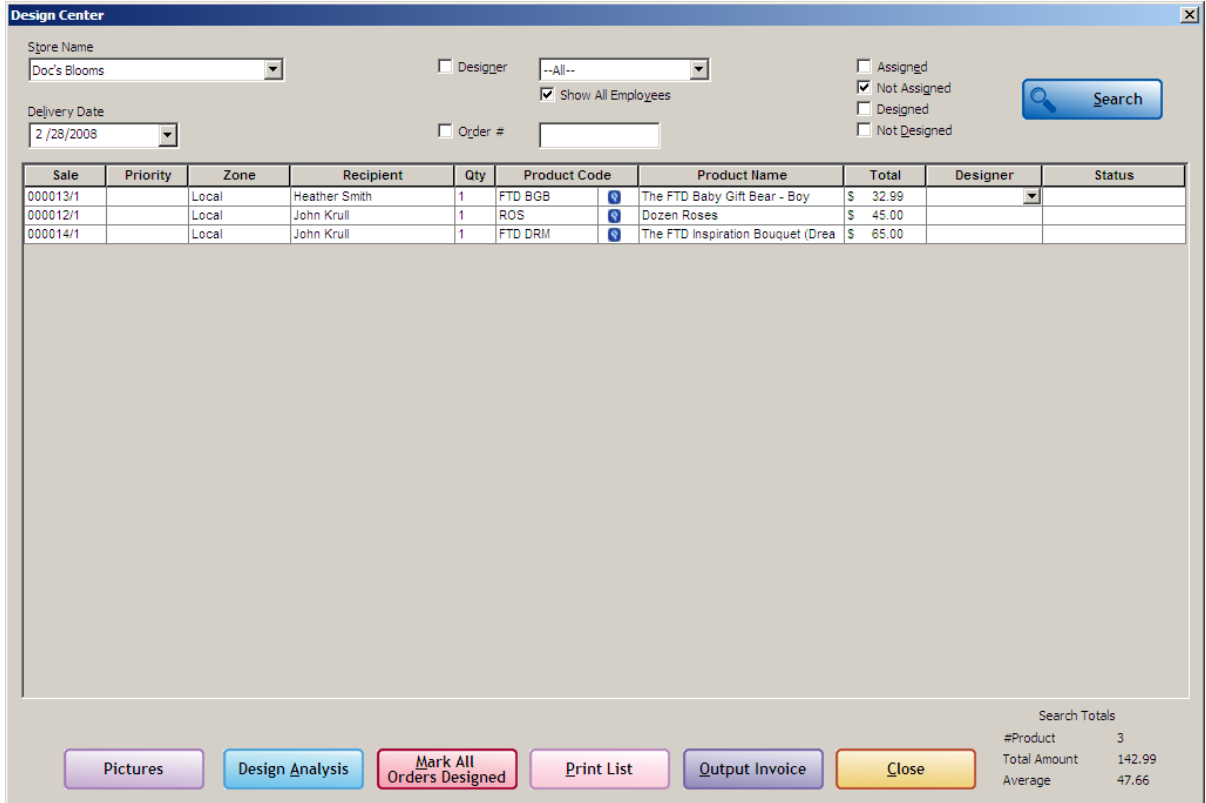
When you open the Design Center window, a search is automatically performed for unassigned orders for delivery on the current date.

IMPORTANT By default, only people with the job functions of Designer or Admin in Mercury Administration have access to the Design Center.

Design Center Window

The Design Center window allows you to search for orders in the design phase, assign orders to designers, and mark orders designed.

Figure 12-1: Design Center Window



The Design Center window contains the following areas:

Search Parameters Area

Using the Design Center window, you can search for orders for a store and delivery date, by order number, designer, or the design status of the order item (assigned, not assigned, designed, not designed). When you have finished selecting search parameters, click Search (ALT+S) to list orders that meet the search criteria.

The Search Parameters area contains the following parameters:

Table 12-1: Design Center Window Search Parameters

Parameter	Description
Store Name	Select the store to view the products for the store, or if you are a multi-store business, you can select All Stores to search all stores.
Delivery Date	Select the delivery date for orders. By default, the delivery date is the current date.
Designer	Check Designer and select a name from the drop-down list to search for products assigned to a specific employee, or select All in the drop-down list to display products for all employees. When Show All Employees is checked, the drop-down list will contain the names of all employees. Designers are a subset of your employees who are assigned the Job Category of Designer in Mercury Administration. To limit the Designer search to employees designated as designers, uncheck Show All Employees.

Table 12-1: Design Center Window Search Parameters (cont.)

Parameter	Description
Order #	Enter the order number, if you want to restrict the results to a specific order. To restrict the results to an individual ticket, enter the order number followed by a slash and the ticket number, for example, 000515/1. You can also use a bar code scanner, if available, to populate the order number field by scanning the bar code on the invoice.
Assigned	Check this option to display products that are assigned and which meet other search criteria, such as store and delivery date.
Not Assigned	Check this option to display products that are not assigned and which meet other search criteria, such as store and delivery date.
Designed	Check this option to display products that have been marked as designed and which meet other search criteria, such as store and delivery date.
Not Designed	Check this option to display products that have not been marked as designed and which meet other search criteria, such as store and delivery date.

Results List

When the search completes, orders matching your search parameters appear in the results area. Each row in the results list represents a product. Several products may comprise a ticket, and several tickets may comprise a single order, so there may be more than one row in the results area per order. The Sale column contains the order and ticket number so you can see which products and tickets are part of the same order.

NOTE Cash and carry, wire out, voided, cancelled, and fees are excluded from searches performed in the Design Center window.

You can sort the orders in the results list by clicking on a column heading. For example, to sort by priority, click the Priority column. You can click the column heading again to toggle ascending and descending order. You can also double-click any product in the list to open the order in Order Entry or Point of Sale, depending on where the order was entered.

The results list contains the following information for each product:

Table 12-2: Results List

Column	Description
Sale	The order and ticket number associated with this item.
Priority	The priority code for the order.
Zone	The zone for the order.
Recipient	The order recipient.
Qty	The number of this product to be designed.
	<hr/> <p>TIP Pay special attention to the Qty column. Quantity indicates how many of a product are to be produced for a ticket.</p> <hr/>
Product Code	The product code for this item. The small icon next to the product code opens the Product Entry window for this product, allowing you to view product pictures and recipes.
Product Name	The product name.

Table 12-2: Results List (cont.)

Column	Description
Total	The total dollar value of the product to be designed. If the quantity is more than 1, the total reflects the product cost multiplied by the quantity.
Designer	If a designer has not been assigned to this order, this column will be blank. You can assign a designer by clicking in this column and selecting the name of the designer from the drop-down list. The list of employees in the drop-down list is based on the Show All Employees checkbox. If Show All Employees is checked, all employees will appear in the drop-down list. If not checked, only designers will appear.
Status	If this order has yet to be designed, this column is blank. If the order has been designed, this column will be Designed. You can mark the item Designed by selecting Designed from this column. If there are multiple items in the ticket, you can select Mark Order Designed to mark all items assigned to the same designer in the ticket as designed.

Search Totals

At the bottom right of the window, the Search Totals area displays the number of products displayed in the results list, the total price of all orders in the list, and the average value of a product in the list.

Buttons

The Design Center window allows you to perform the following actions.

Table 12-3: Design Center Window Buttons

Button	Action
Pictures	Highlight a row in the results list and click Pictures to open the Picture Center window where you can take, attach, or remove a design picture.
Design Analysis	Enter store and delivery date parameters, then click Design Analysis (ALT+A) to get a snapshot of the number of not assigned products and designers' workloads for your store(s) and selected delivery date.
Mark All Orders Designed	Using search parameters, such as Designer, Delivery Date, and Assigned, display a list of products in the results list, then click Mark All Orders Designed (ALT+M) to change their status to designed.
Print List	Click Print List (ALT+P) to print the Ticket List.
Output Invoice	Highlight a row in the results list and click Output Invoice (ALT+O) to print the desired form.
Close	Closes the Design Center window.

Assigning Products to Designers

The first step in assigning designers to products is to locate orders that currently have not been designed and do not have designers assigned. You then assign designers to the products in these orders.

Searching for Undesigned and Unassigned Orders

You use the Design Center window to search for undesigned and unassigned orders.

TASK To search for unassigned orders:

- 1 On the **FTD Mercury Main Menu**, click **Designer**. The **Design Center** window opens. The Design Center automatically displays unassigned products for your store for the current delivery date.
- 2 If you are a multi-store shop and want to search for unassigned orders at another store, from the **Store** list, either select the store where the product is being designed, or select **All Stores**.
- 3 If you want to search for unassigned orders for another delivery date, in the **Delivery Date** field, select the delivery date for the orders.
- 4 In the assignment status options, select **Not Assigned** and **Not Designed**. Ensure **Assigned** and **Designed** are cleared.
- 5 Click **Search**.

The results list displays all products for the selected delivery date that are not assigned and not designed. These are the products that you need to assign to your designers.

Assigning Products to Designers

After you have located unassigned products, you can assign them to designers.

TASK To assign a product to a designer:

- 1 With the results list displaying unassigned products, click in the Designer column for a product.
- 2 From the list of available designers, select a designer for this item.
- 3 If there are multiple products in the ticket that need to be assigned to designers, you are asked if you want to assign all products to the same designer. Click Yes to assign all products in that ticket to the same designer, or No to only assign the current product.

NOTE If other products in the ticket have already been assigned to other designers, selecting Yes will not change the designer. It only assigns currently unassigned items on the ticket to the designer.

Analyzing Designer Workloads

As you assign products to designers, you will find it helpful to check the designers' workloads so you know who is open for additional assignments and who may have a back log of products to design. You can use the Designer Analysis window to get a snapshot for each employee of the items they have in production (assigned but not marked as designed) and completed (marked as designed). If you want to analyze and change designer assignments, you can search by designer in the Design Center and immediately adjust designer workloads.

Analyzing Designer Assignments

TASK To analyze designer assignments

- 1 On the **FTD Mercury Main Menu**, click **Designer**. The **Design Center** window opens.
- 2 If you are a multi-store shop, from the **Store** list, either select the store where the product is being designed, or select **All Stores**. If you are a single store, this is already set to your store name by default.
- 3 In the **Delivery Date** field, select the delivery date for the orders.
- 4 Click **Design Analysis**. The Designer Analysis window will display.
- 5 Click **Close** to return to the **Design Center** window.

Searching for Products Assigned to Designers

You can also review products assigned to employees in the Design Center window. Unlike the Designer Analysis window, however, you can use the Design Center window to change designer assignments.

TASK To search for products assigned to a designer:

- 1 On the **FTD Mercury Main Menu**, click **Designer**. The **Design Center** window opens.
- 2 In the search criteria area, select a name from the **Designer** drop-down list, to search for products assigned to a specific employee. You can also select **ALL** in the drop-down list to search for products assigned to all employees. When **Show All Employees** is checked, the drop-down list will contain the names of all employees. Designers are a subset of your employees to whom you have assigned the Job Category of Designer in Mercury Administration. To limit the Designer search to the employees whom you have designated as designers, uncheck Show All Employees.
- 3 Ensure the **Assigned** option is selected, and the **Not Assigned** option is cleared.
- 4 If desired, specify whether the orders have been designed or not designed.
- 5 Click **Search**.

The results list displays items assigned to the designer you specified. If you want to reassign the designer, click in the Designer column and select a different designer.

Designer Analysis Window

The Designer Analysis window opens when you click the Design Analysis button in the Design Center window. The Designer Analysis window summarizes the status of products assigned to employees for design for a given delivery date. The Designer Analysis window uses the date and store(s) that were selected in the Design Center window to show you for each employee how many products are in Production (assigned to a designer but not yet marked Designed), Designed, and the Total Assigned, Amount, and Average amount. The total number of products not assigned displays in red at the top of the screen.

Click Close to return to the Design Center window.

Figure 12-2: Designer Analysis Window

Assigned products for delivery date:03/11/08

Margie's Flowers

Total not assigned: 1

Designer	In Production	Designed	Total Assigned	Amount Assigned	Average
Debbi	1	0	1	78.50	78.50
Jay	2	0	2	184.64	92.32
Total:	3	0	3		

Close

Marking Products Designed

When you finish designing a product, you need to change its status to Designed. Marking a product designed helps you keep track of the work accomplished.

Marking Items in an Order as Designed

TASK

To mark a product as designed:

- 1 On the **FTD Mercury Main Menu**, click **Designer**. The **Design Center** window opens.
- 2 Enter criteria to locate the product you want to mark designed. You can also use a bar code scanner, if available, to scan an invoice. Scanning the invoice uses the order number to locate the order. Click **Search**.
- 3 Once you locate the product, in the **Status** column, change the status to **Designed**. If there are multiple products associated with the ticket, or multiple tickets in the order, and all are assigned to the same designer, you can select **Mark Order Designed** to mark all of the products in the ticket or order as designed.

Marking All Orders as Designed

You can also mark all orders that appear in the Design Center results list as designed. This is useful if you are searching for a group of orders which are not currently marked as designed and want to change their status to designed at the same time. For instance, after a very busy design period in your shop, a designer can search for all the products assigned to her and which she has finished

designing. She can then mark all of them as designed so that the delivery driver will know that they are ready.

TASK To mark all orders displayed in a designer search as designed:

- 1 On the **FTD Mercury Main Menu**, click **Designer**. The **Design Center** window opens.
- 2 Enter the criteria for your search. Usually, if you want to mark all items designed, you want to search for all items currently **Not Designed**, perhaps limiting your search to the products assigned to a specific designer. Click **Search**.
- 3 Ensure that all the items in the results list are ones you want to mark designed. Once you are certain, click **Mark All Orders Designed**.
- 4 You are prompted to confirm that you want to mark all orders displayed as designed. Click **Yes**. All products that are currently displayed in the results list are marked as designed.

Viewing Product Pictures and Recipes

During the design phase, you can easily view the picture and recipe for items that you are designing.

TASK To view pictures and recipes of products in design:

- 1 On the **FTD Mercury Main Menu**, click **Designer**. The **Design Center** window opens.
- 2 Enter criteria to locate the order you are designing. You can also use a bar code scanner, if available, to scan an invoice. Scanning the invoice uses the order number to locate the order. Click **Search**.
- 3 In a ticket in the results list, click the small button in the Product Code column. The Product Entry window for the product opens with a picture of the product and the product recipe. For more information, see [Product Entry Window](#) on page 8-8.

Attaching Design Pictures to Tickets

You can attach pictures to product tickets in the Design Center window. This is particularly useful if your workflow includes taking a picture prior to marking the product as designed.

TASK To take and attach pictures for products you are designing:

- 1 On the **FTD Mercury Main Menu**, click **Designer**. The **Design Center** window opens.
- 2 Enter criteria to locate the order to which you want to attach a picture. You can also use a bar code scanner, if available, to scan an invoice. Scanning the invoice uses the order number to locate the order. Click **Search**.
- 3 In the results list, select the ticket to which you want to attach a picture.
- 4 Click the **Pictures** button. The Picture Center window opens. If a picture was previously attached to the order, it will appear in the Picture Center.
- 5 In the Attach Pictures area, select Design.
- 6 Browse or take the design picture:
 - » Click Browse to open a window where you can browse to a picture on your computer. If you took the picture with a camera other than the Logitech QuickCam Orbit, this is the option you should use
 - » Click Camera View to use an attached Logitech QuickCam Orbit to take the picture. Picture Center displays the view from the camera. When you have the picture the way you want it, click Take Picture.

- 7 When Picture Center displays the picture you want to attach, click Attach. The Picture's information is displayed in the Attached Pictures area at the bottom of the window.\
- 8 Click Escape to close Picture Center.

The Design picture is now attached to the ticket.

Printing Invoices

You can print invoices from the Design Center window. This is useful if your workflow requires that you print invoices for tickets that you have designed.

TASK To print invoices for tickets that you are designing:

- 1 On the **FTD Mercury Main Menu**, click **Designer**. The **Design Center** window opens.
- 2 Enter criteria to locate the ticket whose invoice you want to print. You can also use a bar code scanner, if available, to scan an invoice. Scanning the invoice uses the order number to locate the order. Click **Search**.
- 3 From the results list, select the ticket whose invoice you want to print.
- 4 Click **Output Invoice**.

Processing and Settling Credit Cards

FTD Mercury provides the capability to process credit cards directly within the application. If you have a high-speed Internet connection (DSL, broadband, etc.), you can also take advantage of processing credit cards over the Internet, eliminating the need for an additional phone line.

Credit Card Tasks

- » [Processing Credit Cards](#)
- » [Voice Authorizing Credit Cards](#)
- » [Manually Authorizing Credit Card Transactions](#)
- » [Searching for Credit Card Transactions](#)
- » [Handling Unsettled Credit Card Authorizations](#) (including resending unapproved transactions and deleting declined transactions)

FTD Cash-Flo™ Credit Card Program

As an FTD Member, you do not have to look any further than the FTD Cash-Flo Program to find the very best credit card service in the floral industry. Offering complete credit card processing services for all Members, the program includes electronic recording of transactions and authorization service and equipment. Simple to use for all major credit cards, yet very affordable, the FTD Cash-Flo Program provides a variety of benefits that will make processing credit cards the easiest business transaction of your busy day.

To sign up for credit card services, call Cash-Flo at 1-800-788-9000 x4262. For more information, visit www.ftdi.com/cashflo.

Credit Cards over the Internet

For florists with high-speed Internet connections (broadband, DSL, etc.), FTD Mercury offers you the ability to process credit card transactions over the Internet (sometimes referred to as CCAPI technology). Not only do you increase the authorization speed, you also eliminate the need to have a dedicated phone line for credit card transactions. You also reduce bookkeeping tasks because credit cards processed over the Internet are automatically settled each night—without your intervention. Automatic settlement also ensures timely deposits from FTD when you elect to have direct deposit to your bank account.

To sign up for credit card processing over the Internet, contact Mercury Technology Sales at 1-800-767-3222.

Once you have signed up to process credit cards over the Internet, you need to configure your system to do so using the Credit Cards screen in Mercury Administration. For more information, see [Credit Cards Screen](#) on page 24–9.

IMPORTANT You must be processing Credit Cards over the Internet to install FTD Mercury X.

Processing Credit Cards

To accept a credit card as payment for an order, simply enter the order in Order Entry or Point of Sale and click **Complete**. When the **Payments** window opens, either swipe the credit card, or enter the credit card information. Ensure you select whether the customer is present for the sale. If you swipe the credit card, FTD Mercury will display the information in the payments grid. If you have not yet entered customer information, FTD Mercury automatically performs a customer lookup by credit card number when you swipe the card. If FTD Mercury finds a match, the customer information is displayed in the **Payments** window. If more than one customer matches the lookup, FTD Mercury displays all matches and allows you to select the correct customer.

If the credit card number is not already associated with a customer, the system associates the credit card number with the customer entered in the **Customer** area. If you are using the Point of Sale module, and you are using the default customer or no customer, the system does not associate the credit card number with any customer.

The Approval Process

The approval process takes place after you click **Complete** in the **Payments** window. If you are not licensed to use the FTD Mercury Credit Card module, the order is marked complete automatically, and you can click the **New Order** button to proceed with the next order. However, if you are licensed to use the FTD Mercury Credit Card module, the system automatically contacts the credit card clearinghouse and attempts to obtain authorization for the credit card.

If the card is approved, the approval code displays in the **Approval** column of the **Payments** window and the receipts print out. If the card is not approved, you receive an error. You can then enter new payment information (such as a different credit card or a different payment type).

If you receive a voice authorization error, the order will be filed as incomplete. You then need to call the appropriate Cash-Flo voice authorization number (see [FTD Cash-Flo Voice Authorization Numbers](#) on page 13–3) to receive voice authorization. Once you have received voice authorization, follow the directions in [Entering Voice Authorization Details for a Credit Card Transaction](#) on page 13–3.

In Order Entry, if you click Escape during the authorization process, you can begin entering a new order. If there is an error, the invoice will print with a declined message, and a window will appear informing you there was an issue with the order, including the order number. In Point of Sale, you must wait until either the credit card is authorized or declined before you can proceed to the next order.

If the credit card authorization is attempting authorization but has not received a valid return code from the clearing center within a minute, you receive a message in Order Entry or Point of Sale informing you that there may be a problem with the authorization in progress. If you click **Yes**, you are taken to a blank **Order Entry** or **Point of Sale** window where you can enter another order. If you click **No**, the system continues to wait for 1–3 minutes.

Changing the Price for a Credit Card Order Prior to Settlement

Before a credit card transaction has been settled, you still have an opportunity to change the price of the order. You may, for example, need to change a delivery or product price, or you may want to add to the order. You cannot make changes after the transaction has been settled.

TASK To change the price for an already placed credit card order (if the transaction has not been settled):

- 1 On the **FTD Mercury Main Menu**, click **Order Entry** or **Point of Sale**, depending on where the order was originally entered.
- 2 Click **Lookup**. The **Ticket Search** window opens.
- 3 Click the **Customer** tab.
- 4 Enter the customer's name in the text box and click **Search**.
- 5 Double-click the ticket you want to change to open it in **Order Entry** or **Point of Sale**.
- 6 Make changes to the product or delivery amounts as necessary.
- 7 Click **Payment**.
- 8 In the **Payments** grid, change the value of the **Amount** column to equal the amount displayed in the **Total** field.
- 9 If an unassigned remainder payment is present below the credit card payment (or, for multi-payment transactions, if an unassigned remainder is present below the other payment types and credit card payment), right-click on the unassigned remainder payment and click **Remove**.
- 10 Click **Complete**. The sale is approved with the new total.

Voice Authorizing Credit Cards

Voice authorizations are done if you receive an error or message to contact the credit card company, or if the card was previously rejected and you want to receive verbal authorization from your credit card clearinghouse. You must be a member of the FTD Cash-Flo program to use voice authorization in FTD Mercury.

FTD Cash-Flo Voice Authorization Numbers

Depending on the credit card type you are authorizing, call the appropriate number for voice authorization requests.

Table 13-1: FTD Cash-Flo Voice Authorization Numbers

Credit Card	Telephone Number	Bank Number	Merchant ID Number
Visa/MasterCard	1-800-944-1111	097700	3830 + Your FTD # + Terminal #*
American Express	1-800-528-2121		799-410-0014
Discover	1-800-347-1111		6011-0138-1021-318
Diners Club	1-800-525-9040		05211-26383

* Your terminal number is usually 88. If you are unsure of your terminal ID, check your monthly Confirmation of Credit Cards report and the first two digits of any transaction line item will be the numbers you use.

Entering Voice Authorization Details for a Credit Card Transaction

Voice authorization is only performed on credit card transactions associated with an order. When you interact with the Credit Card Authorization window, you can only enter information into select fields.

TASK To enter voice authorization for a credit card transaction:

- 1 On the **Credit Cards** menu, click **Voice/Resend Authorization**. The **Unsettled Credit Card Authorizations** window opens.
- 2 From the **Store Name** list, select your store name.
- 3 Click **Search**.
- 4 Locate the transaction you are entering voice authorization for from the results list and click **Voice**. The **Credit Card Authorization** window opens.
- 5 In the **Cardholder** area:
 - a. In the **Name** field, verify the cardholder's name.
 - b. In the **Address** field, verify the cardholder's address.
 - c. From the **Present** list, the selected option.
- 6 In the **Approval** area, in the **Code** field, enter the code provided to you by your credit card clearinghouse.
- 7 Click **Send**.

NOTE If you are using Direct Dial as your credit card processing mechanism, you will hear the Comm Pool dial out on FTD Mercury.

Once FTD Mercury contacts the credit card clearinghouse, the transaction is authorized.

Manually Authorizing Credit Card Transactions

Although rare, it may be necessary to manually authorize a credit card transaction. For instance, if you changed accounting systems and had already recorded a sale, but not processed the credit card, you may need to perform this task.

TASK To manually authorize a credit card:

- 1 On the **Credit Cards** menu, click **Manual Authorization**. The **Credit Card Authorization** window opens.
- 2 In the **Sale** area, in the **Amount** field, enter the amount for the transaction.
- 3 If this is a refund, select the **Refund** check box.
- 4 In the **Card** area:
 - a. In the **Number** field, enter the card number. The **Type** field will automatically populate with the credit card type based on the card number.
 - b. In the **Expiration** field, enter the expiration date for the card in MM/YYYY format.
- 5 In the **Cardholder** area:
 - a. In the **Name** field, enter the name as it appears on the credit card.
 - b. In the **Address** field, enter the cardholder's address.
 - c. From the **Present** list, select if the cardholder was present (and, if not, how the order came to you).
- 6 Your store name is listed by default in the **Store Name** field. If you have multiple stores, click the arrow and select the name of the store for which you are authorizing this credit card transaction.
- 7 Click **Send**.

NOTE If you use dial up to process credit cards, you will hear the Comm Pool dial out for the authorization. FTD Mercury will contact the credit card clearinghouse for authorization.

Credit Card Authorization Window

The **Credit Card Authorization** window serves two purposes. First, for voice authorizations, it allows you to enter the voice authorization code provided by your credit card clearinghouse and receive authorization for that transaction. You can also manually enter a credit card transaction that is not associated with an order in FTD Mercury, including providing a refund to a credit card.

Figure 13-1: Credit Card Authorization Window

You must be a member of the FTD Cash-Flo program to authorize credit cards.

Sale Area

The Sale area contains the following settings:

Table 13-2: Sale Area Settings

Setting	Description
Number	If you are voice authorizing a credit card transaction, this number is the internally generated number assigned to the sale by FTD Mercury. This field is not visible when manually entering a credit card transaction.
Amount	For manual credit card transactions, enter the total amount for this authorization, including any tax, delivery fees, etc. You can use the calculator if necessary. For credit card transactions you are voice authorizing, this field contains the amount for the authorization and is read-only.
Refund	When manually entering a credit card transaction, select this option if the authorization is for a refund.

Card Area

The fields in this area are read-only for voice authorizations. For manual credit card transactions, you must enter the information.

Table 13-3: Card Area Fields

Field	Description
Number	Enter the card number.
Type	The type automatically populates based on the card number.
Expiration	Enter the expiration date for the card in MM/YYYY format (that is, if the card expires in May of 2009, enter 05/2009).

Cardholder Area

The cardholder area contains the following settings:

Table 13-4: Cardholder Area Settings

Setting	Description
Name	Enter the name of the cardholder as it appears on the credit card.
Address	Enter the cardholder's address.
Present	Select whether the cardholder was present for this transaction. You can select from the following options: <ul style="list-style-type: none"> » No (phone order): The customer placed the order over the phone. » No (standing order): The order is for a standing order. You can also use this for fax orders. » No (Internet order): The customer placed the order over the Internet or via email. » No (mail order): The customer placed the order by mail. » Yes: The customer was present when the order was placed.

Approval Area

The approval area contains the following settings:

Table 13-5: Approval Area Settings

Setting	Description
Verbal	This box is automatically checked for voice authorization and automatically cleared for manual credit card transactions.
Code	If you are voice authorizing a transaction, enter the code provided by your credit card clearinghouse.

Store Details Area

At the bottom of the window, select the store name for which you are performing this credit card authorization (if you are performing manual authorization); you cannot select this for voice authorization, as there is a store already associated with the transaction. If you are entering multiple manual credit card transactions, select **Batch Mode** to open this window again after you send this transaction.

When you have completed this window, click **Send**. If you process credit cards over dial up, you will hear the Comm Pool dial out.

View Credit Card Authorization Window

Figure 13-2: View Credit Card Authorization Window

The screenshot shows a software window titled "View Credit Card Authorization" with a blue title bar and a close button (X) in the top right corner. The window contains several input fields and labels:

- Sale**: Number: 22, Refund: (empty), Amount: 5.34
- Card**: Number: XXXXXXXXXXXXXXX6781, Type: Visa, Exp Date: XX/XX/XX
- Cardholder**: Name: Jon Robertson, Address: 3113 Woodcreek Dr. DOWNERS GROVE, IL 60515, Present: No (phone order)
- Approval**: Code: AP123456, Verbal: (empty), Date: 01/10/08 15:23:57
- Batch**: Number: 0000, Item: 0000
- Address Verification/Other**: n/a

At the bottom of the window, there are five buttons: Resend, Previous, Next, Voice, and Close.

The **View Credit Card Authorization** window displays authorization information for a particular credit card transaction. You can access this window by double-clicking a transaction in Credit Card Search. This information is display only and cannot be changed.

Sale Area

The **Number** field displays the number of this sale, as assigned by FTD Mercury. The **Amount** field displays the authorization amount. If the authorization was a refund on a charge, the word **Refund** will appear in black in this area.

Card Area

The **Card** area displays information about the credit card used to make this purchase, including the credit card number, type, and expiration date. Portions of the credit card number and expiration date will be masked for security.

Cardholder Area

The **Cardholder** area displays information about the cardholder, including their name, address (if available), and whether they were present at the sale.

Approval Area

In this area, the approval code and date are displayed. If **Verbal** appears in black, this authorization was performed over the phone with your credit card clearing center.

Batch Area

This area displays the settlement batch number and the item number of this authorization in this batch. These are system-assigned numbers.

Address Verification/Other Area

This area displays the address verification service (AVS) response or detail about an ERROR message.

Click **Close** to close this window.

Searching for Credit Card Transactions

TASK To search for a credit card transaction:

- 1 On the **Search** menu, click **Credit Card Search**. The **Credit Card Search** window opens.
- 2 In the **Search Parameters** area, enter the transaction number, credit card number, or name of the credit card holder and click **Search**. Transactions matching your search criteria appear in the results list below the **Search Parameters** area.

Once you have located the credit card transaction, you can perform several tasks on it, including:

- » [Viewing Credit Card Transactions from the Credit Card Search Window](#)
- » [Resending Credit Card Transactions from the Credit Card Search Window](#)
- » [Voice Authorizing Credit Card Transactions from the Credit Card Search Window](#)
- » [Deleting Unapproved Credit Card Transactions from the Credit Card Search Window](#)

Viewing Credit Card Transactions from the Credit Card Search Window

TASK To view details for a credit card transaction:

- 1 On the **Search** menu, click **Credit Card Search**. The **Credit Card Search** window opens.
- 2 In the **Search Parameters** area, enter the transaction number, credit card number, or name of the credit card holder and click **Search**. Transactions matching your search criteria appear in the results list below the **Search Parameters** area.
- 3 From the results list, double-click the transaction you want to view. Transaction details appear in the **View Credit Card Authorization** window.

When you have finished viewing the transaction, click **Close** to return to the **Credit Card Search** window.

Resending Credit Card Transactions from the Credit Card Search Window

TASK To resend a credit card transaction for authorization:

- 1 On the **Search** menu, click **Credit Card Search**. The **Credit Card Search** window opens.
- 2 In the **Search Parameters** area, enter the transaction number, credit card number, or name of the credit card holder and click **Search**. Transactions matching your search criteria appear in the results list below the **Search Parameters** area.
- 3 Select the transaction you want to resend for authorization and click **Resend**.

When you are finished, click **Close** to close the **Credit Card Search** window.

Voice Authorizing Credit Card Transactions from the Credit Card Search Window

- TASK** To perform voice authorization on a credit card transaction:
- 1 On the **Search** menu, click **Credit Card Search**. The **Credit Card Search** window opens.
 - 2 In the **Search Parameters** area, enter the transaction number, credit card number, or name of the credit card holder and click **Search**. Transactions matching your search criteria appear in the results list below the **Search Parameters** area.
 - 3 Select the transaction you want to resend for authorization and click **Voice**. The **Credit Card Authorization** window opens.
 - 4 In the **Cardholder** area:
 - a. In the **Name** field, enter the cardholders name.
 - b. In the **Address** field, enter the address for the cardholder.
 - c. From the **Present** list, select whether the cardholder is present for the transaction.
 - 5 In the **Approval** area, in the **Code** field, enter the approval code provided by your credit card clearinghouse.
 - 6 Click **Send**.

NOTE If you are using Direct Dial as your credit card processing mechanism, you will hear the Comm Pool dial out on FTD Mercury.

Once FTD Mercury contacts the credit card clearinghouse, the transaction is authorized.

Deleting Unapproved Credit Card Transactions from the Credit Card Search Window

You can only delete authorizations that were entered manually and not associated with a sale or payment.

- TASK** To delete a credit card transaction from FTD Mercury:
- 1 On the **Search** menu, click **Credit Card Search**. The **Credit Card Search** window opens.
 - 2 In the **Search Parameters** area, enter the credit card number or name of the credit card holder and click **Search**. Transactions matching your search criteria appear in the results list below the **Search Parameters** area.
 - 3 Select the transaction you want to delete and click **Delete**.

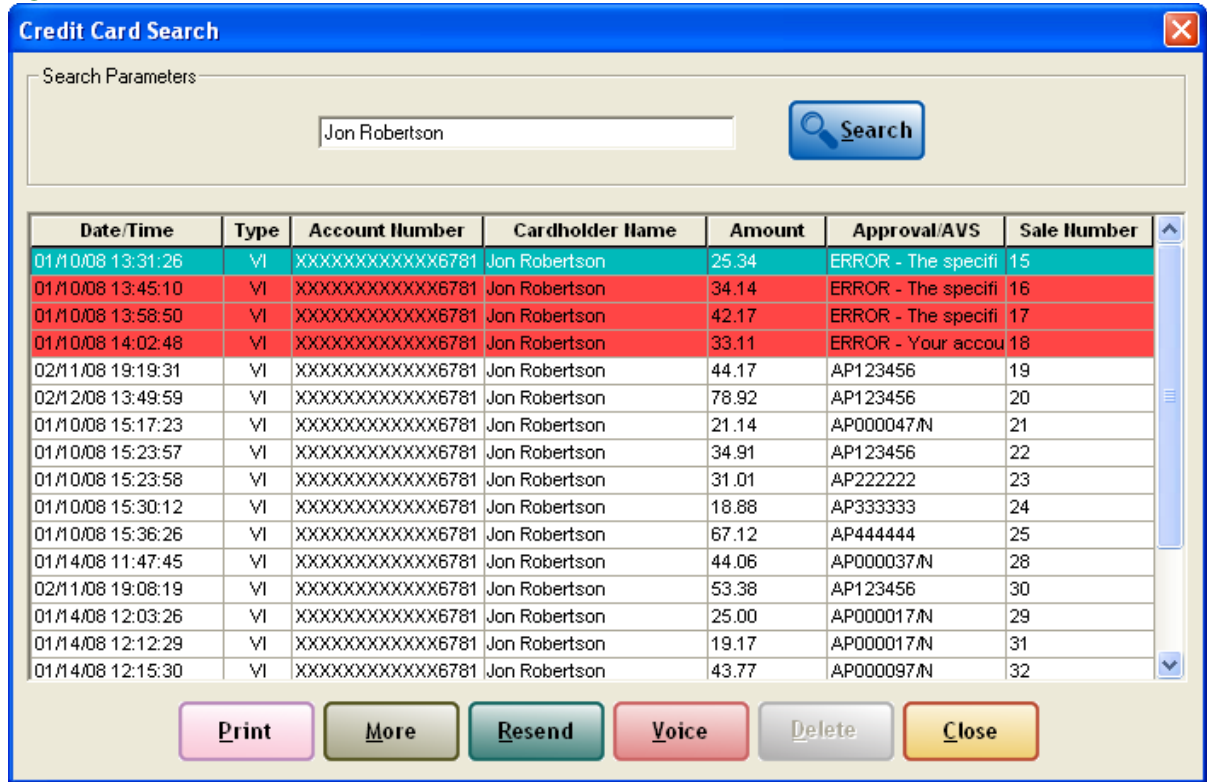
IMPORTANT When you delete an unauthorized transaction, it is deleted permanently from your system.

When you are finished with deleting the transaction, click **Close** to close the **Credit Card Search** window.

Credit Card Search Window

The **Credit Card Search** window allows you to search for transactions in your credit card log. Credit card information is stored in your FTD Mercury system automatically when a customer pays with a credit card. Credit cards that have been entered into the system manually or through voice or manual authorization are also stored in your system and are available to search through this feature.

Figure 13-3: Credit Card Search Window



In the **Search Parameters** area, you can enter the transaction number, the credit card number, or the name of the card holder.

IMPORTANT If you enter the credit card number, you must enter the full credit card number to get a match (even though the results only display the last 4 digits for security purposes).

When you click **Search**, matching results are returned in the list below the **Search Parameters** area. The results list contains the following columns:

Table 13-6: Credit Card Search Window Details

Column	Description
Date/Time	The date and time of the transaction.
Type	The credit card type.
Account Number	The credit card number used for the transaction. All but the last four digits are masked.
Cardholder Name	The cardholder name.
Amount	The transaction amount.
Approval/AVS	This column displays the approval code or details about any errors (such as a declined or expired credit card). Some common approval codes include: <ul style="list-style-type: none"> » AP + Code: Card was approved. » INVLD CODE: Credit card number does not exist. » DECLINE: Card was declined. » ERROR: The credit card is expired or the address and ZIP code do not match.

Table 13-6: Credit Card Search Window Details (cont.)

Column	Description
Sale Number	The sale number (automatically assigned by FTD Mercury).

From this window, you can perform the following tasks:

- » [Viewing Credit Card Transactions from the Credit Card Search Window](#)
- » [Resending Credit Card Transactions from the Credit Card Search Window](#)
- » [Voice Authorizing Credit Card Transactions from the Credit Card Search Window](#)
- » [Deleting Unapproved Credit Card Transactions from the Credit Card Search Window](#)

If you want to print the list of matching results, click **Print**. If more results have been returned than can fit in the window, click **More** to display the additional results.

Click **Close** to close the **Credit Card Search** window.

NOTE

You may want to limit your employees' access to this window. To do so, you must define employee access in Mercury Administration.

Results are color coded:

Table 13-7: Credit Card Search Window Legend

Format	Description
Red Highlight	Declined credit card or error
Normal Text	No errors

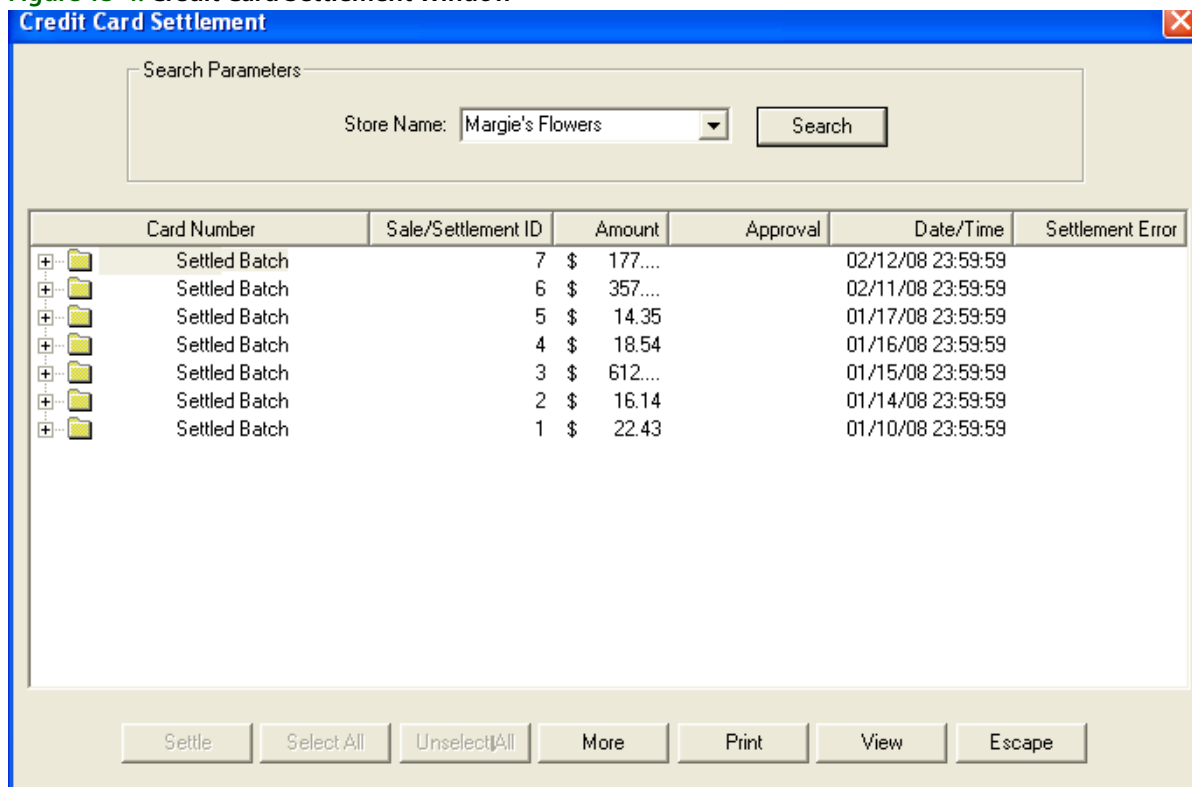
Credit Card Settlement

If you are a member of the Cash-Flo program, you may use the Credit Card Settlement process to receive payment for credit card transactions. After the settlement is processed, the deposit is made to your Cash-Flo bank account for deposits. There is no limit to the number of transactions in a settlement batch. You may settle your credit cards throughout the day or at the end of the day if you use Direct Dial as your credit card processing method; if you process credit cards over the Internet, your credit card transactions are automatically settled overnight without your intervention.

You can see credit card settlement information in the Credit Card Settlement window, including the amount for each card settled, as well as total amounts for current and previously settled credit card batches (see [Credit Card Settlement Window](#) on page 13-12 for details). Credit card authorizations from incomplete sales will not display for settlement. You can only settle credit card authorizations from complete sales. If you are using a dial up connection for credit card processing, if a sale is paid for with more than one credit card, it is unavailable for settlement until all payments have been authorized. However, if you process credit cards over the Internet, individual credit cards will be settled for the sale automatically overnight as the payments become authorized.

Credit Card Settlement Window

Figure 13-4: Credit Card Settlement Window



The **Credit Card Settlement** window allows you to select the credit card transactions you want to settle, and view settlement batches and transactions. In the **Search Parameters** area, select the store you want to view settlement batches for, and click **Search**.

The **Current Batch** folder contains the transactions that have yet to be settled. The **Settled Batch** folders display already settled batches. There may also be a **Pending Batch** folder if settlement is in progress. Each of the folders also displays the total amount settled in the **Amount** column. If you double-click on a settlement batch folder, the **View Settlement Totals** window opens.

NOTE Voided transactions are not displayed regardless of their status.

When you expand a folder (by clicking the + sign to the left of the folder), you can see each transaction in the batch, including the card number (partially masked for security), the sale/settlement ID, the amount, the approval code, the date and time of the transaction, and any errors that may be associated with the transaction.

NOTE When configured to process credit cards using Dial Up, approved transactions do not appear until all transactions in the batch have been approved.

If you are configured to process credit cards over the Internet, all transactions in the current batch are marked to be included in the settlement, and you cannot select or clear items from settlement. Additionally, you cannot settle the transactions manually; they will be settled overnight automatically.

Handling Unsettled Credit Card Authorizations

FTD Mercury provides functionality so you can view and manage unsettled credit card authorizations. You may use this option to monitor your store's credit card activity.

TASK To view and manage unsettled credit card authorizations:

- 1 On the **Credit Cards** menu, click **View Unsettled Authorizations**. The **Unsettled Credit Card Authorizations** window opens.
- 2 In the **View Parameters** section, use your mouse to select whether you want to **View Approved**, **View All**, or **View Unapproved** credit card authorizations.
- 3 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 wish to view unsettled authorizations.
- 4 Click **Search**. A list of transactions displays below the **View Parameters** section.

You can then view details for a transaction by double-clicking it, resend it for approval by selecting it and clicking **Resend**, perform voice authorization for the transaction by clicking **Voice**, or delete the transaction by selecting it and clicking **Delete**. Depending on whether the transaction has been approved, some of these tasks may be unavailable. For example, the **Delete** button is only enabled for manually authorized credit card transactions that have not been settled; you cannot delete other credit card transactions, so **Delete** will not be enabled for these other transactions.

NOTE If you delete an unsettled credit card transaction, it is removed permanently from your system.

Unsettled Credit Card Authorizations Window

Figure 13-5: Unsettled Credit Card Authorizations Window

Date/Time	Type	Account Number	Cardholder Name	Amount	Approval/AVS	Sale Number
02/12/08 14:51:18	VI	XXXXXXXXXXXX6781	Ander Cedrik	21.30	DECLINED/N	180
02/12/08 14:49:14	VI	XXXXXXXXXXXX6781	Jon Robertson	44.97	DECLINED/N	179
01/10/08 14:02:48	VI	XXXXXXXXXXXX6781	Tom Shapiro	42.12	ERROR - Your accou	18
01/10/08 13:58:50	VI	XXXXXXXXXXXX6781	George Larraby	65.67	ERROR - The specifie	17
01/10/08 13:45:10	VI	XXXXXXXXXXXX6781	Elizabeth MacKenzie	71.66	ERROR - The specifie	16
01/10/08 13:31:26	VI	XXXXXXXXXXXX6781	Vladimir Deetz	45.34	ERROR - The specifie	15

The **Unsettled Credit Card Authorizations** window displays either the approved, unapproved, or all unsettled credit card transactions for the selected store. From this window, you can monitor a store's credit card authorization activity, handle credit card authorization issues, and remove declined credit card transactions.

NOTE Voided transactions are not displayed regardless of their status.

View Parameters Area

The **View Parameters** area allows you to select the criteria for the results list. You can select whether you want to view approved, unapproved, or all unsettled credit card authorizations. You must select the store name for which you are viewing unsettled credit card authorizations, and click Search to display a list of matching results.

Results List

After you have configured your search parameters, unsettled credit card authorizations matching your search criteria appear in the results list. Each unsettled authorization includes the following information:

Table 13-8: Results List

Column	Description
Date/Time	The date and time of the transaction.
Type	The credit card type.
Account Number	The credit card number.
Cardholder Name	The cardholder name
Amount	The transaction amount.
Approval/AVS	Displays the approval code for authorized transactions or the status of unauthorized transactions. If this transaction has yet to be sent for authorization, the column will be blank. If there is an error, the column will display ERROR. If the authorization is pending, this column will display PENDING.
Sale Number	The internally generated sale number associated with the transaction.

Buttons

At the bottom of the window, there are several buttons that allow you to perform actions on the selected unsettled credit card authorization.

Table 13-9: Unsettled Credit Card Authorizations Window Buttons

Button	Description
Print	Click this button to print the results list.
More	If there are more entries than fit in the results list, click this button to display them.
Resend	Click this button to resend the selected transaction (for example, if you had a communication issue). If the order has a successful approval code, you cannot resend it.
Voice	Click this button to perform voice authorization for the transaction, such as if a order has the status of declined or error. All non-cancelled transactions that do not have successful approval or are not marked as PENDING are available for voice authorization. You cannot perform voice authorization if the transaction already has a successful approval code.
Delete	Click this button to delete the selected transaction from FTD Mercury. You can only delete manually entered authorizations not associated with a sale or payment.
Close	Click this button to close the window.

View Settlement Totals Window

Figure 13-6: View Settlement Totals Window

The screenshot shows a window titled "View Settlement Totals" with a blue header and a close button in the top right corner. The window is divided into three main sections: "Batch", "Credit Card", and "Debit Card". Each section contains input fields for various data points. At the bottom, there are "Print" and "Close" buttons.

Section	Field	Value
Batch	Settlement ID:	7
	Approval Code:	
	Total Items:	9
	Total Amount:	177.78
Date:		Tuesday, February 12, 2008
Credit Card	Purchases:	9
	Purchase Amount:	177.78
	Refunds:	0
	Refund Amount:	0.00
Debit Card	Purchases:	0
	Purchase Amount:	0.00
	Refunds:	0
	Refund Amount:	0.00

The **View Settlement Totals** window allows you to view all credit card information for a particular settlement. You can open it by double-clicking on a batch in the **Credit Card Settlement** window.

- » **Batch** displays general information for that settlement including settlement ID, date of settlement, total number of items, the NDC approval code for the settlement, and the total dollar amount of the settlement.
- » **Credit Card** displays the number of items purchased with credit cards as well as the total dollar amount for these items for both purchases and refunds.

Click **Print** to print the information displayed in this window.

Mercury Delivery

The Mercury Delivery program allows you to create and maintain delivery zones, automatically create delivery routes using Microsoft® MapPoint®, mark orders as on the truck/Delivered/Not Delivered, re-route orders that were not delivered, print delivery reports, and more. Delivery orders entered in Order Entry and Point of Sale (orders with delivery zones associated with them) will display in the new Mercury Delivery mapping and routing application so that they can be routed.

FTD Mercury offers the following Mercury Delivery modules: Advanced Delivery and Wireless Delivery Confirmation.

The Advanced Delivery module offers you the Mercury Delivery application, which allows you to maintain delivery zones, route orders and create delivery routes using Microsoft MapPoint 2004, mark orders Delivered, print delivery reports, and more (see [Mapping and Routing](#) on page 14–4). It also offers you Address Verification (see [Address Verification](#) on page 14–1).

With the Advanced Delivery module you can add the Wireless Delivery Confirmation module. This module allows your delivery drivers to use wireless phones to update the delivery status of orders (mark orders Delivered or Not Delivered). See [Wireless Delivery Confirmation](#) on page 14–32.

For pricing information for either of these modules, please call Mercury Technology Sales at 1-800-767-3222.

Address Verification

If you purchased the Advanced Mercury Delivery module, you have Address Verification. Address Verification compares addresses that you enter in the **Order Entry**, **Point of Sale**, and **Customer Detail Information** windows to a quarterly-updated address database of U.S. and Canadian addresses.

If an address is an exact match, Address Verification compares each address element, correcting any errors in your data. For example, if the address is incorrectly formatted, misspelled, or missing the 4-digit ZIP code extension, the system corrects the address.

When you press the <Tab> key to exit the address field, the Address Verification software attempts to find a match. If an exact match is found, the address will be verified, and if you entered a 5-digit ZIP code, it will be replaced with a 9-digit ZIP code. If Address Verification cannot find an exact match, it recommends close matches to the address that you entered.

If you have delivery zones set up, the delivery zone and charge will be selected for you automatically in Order Entry and Point of Sale, based on the recipient's postal code or location on the map.

By default, the system will prompt you with a close address match. You can change this setting so that addresses are corrected automatically without prompting you first. This setting can be

changed in the FTD Mercury Configuration screen (from the FTD Mercury menu bar, click **Tools**, then click **Settings**).

If an address cannot be verified (and you do not select a close match if one was suggested), you can still save and complete the order as normal. When you go to route that order in the Mercury Delivery application, Microsoft MapPoint uses its own address verification feature to try and verify the address. If MapPoint cannot verify the address, it warns you that the address cannot be verified (MapPoint cannot suggest close matches). If the address cannot be verified by MapPoint, you can still add the order to the route, however the order is not added to the delivery map and is not included in the driving instructions.

NOTE

In the FTD Mercury Configuration window, there is a setting called Enable Address Verification Override. If this is selected, a Verify check box is displayed in the Recipient area in Order Entry and Point of Sale. The Verify check box allows you to selectively override address verification for orders (for example, if this is for an address that is correct, yet does not verify for a reason such as new construction).

Setting Up Address Verification

Following are the setups that you must complete before using Address Verification:

- » The Advanced Delivery module must be licensed in Mercury Administration. You should have received a General message from FTD that enabled this module on your system. To check that Address Verification is licensed on your system, go to the License option in Mercury Administration and make sure that the Address Verification component reads **Valid**. See [License Screen](#) on page 24–55 for more information.
- » In addition to installing the Microsoft MapPoint 2004 software, you should have also installed the Centrus address verification data on your system. If you purchased the Advanced Mercury Delivery module, the Centrus CDs were shipped to you with your FTD Mercury upgrade.

Using Address Verification

In Order Entry or Point of Sale, when you enter an address, the Address Verification software attempts to find a match. If an exact match is found, the address is verified, and if you entered a 5-digit ZIP code, it is replaced with a 9-digit ZIP code. If a close but not exact match is found, the closest matches pop up on your screen so that you can select the correct address:

Figure 14-1: Address Verification

Original Address

Street: 3113 WOODCREEKE LANE

City: DOWNERS GROVE

State/Province: IL

Postal Code: 60515

Country: USA

Valid Address(es)

Street	City	State/Prov	Postal Code	Country
3113 WOODCREEK DR	DOWNERS GROVE	IL	60515-5412	USA

Select Escape

In the example above, click **Select** to select the highlighted address. If there are multiple addresses found, you would highlight the correct address from the list and then click **Select**. If you do not want to select any of the valid addresses from the list, you can click **Escape** and return to the order without changing the address that you entered (the address will not be verified). If you selected an address, the new address displays for you in the address field.

If you have delivery zones set up, the delivery zone and charge are selected for you automatically in Order Entry and Point of Sale, based on the recipient's postal code or location on the map. (If you have the Mercury Delivery module, see [Delivery Zones](#) on page 14–7 to learn how to set up delivery zones and charges. If you do not have the Mercury Delivery module, see [Delivery Zone Screen](#) on page 24–43.)

NOTE

If you deliver to an army base, address verification is not able to locate it because the military does not give the exact location of their bases. Since army bases have their own postal codes, you can create a delivery zone by postal code for the army base.

By default, the system prompts you with a close address match. You can change this setting so that addresses are corrected automatically without prompting you first. This setting can be changed in the FTD Mercury Configuration window (on the FTD Mercury **Tools** menu, click **Settings**.) For more information on the FTD Mercury Configuration window, see [FTD Mercury Configuration Window](#) on page 2–17.

When the **Prompt before changing a close address match** is selected, the system first prompts you before changing an address to a close match. If this option is not selected, you are not prompted first if the system finds an address that is close to the address that you entered.

Updating the Address Verification Database

If you have Address Verification, FTD sends you an address update CD every three months.

TASK **To install the update:**

- 1 Insert disc A in your CD drive. This starts the installation automatically. If the installation does not begin automatically, click the **Start** button on your desktop, then click **Run**. Type d: \setup. exe (where d is the letter of your CD drive) and then press **Enter**.
- 2 Click **Begin**.
- 3 When prompted, insert disc B into your CD drive, then click **OK**.
- 4 When prompted, insert disc C into your CD drive, then click **OK**.
- 5 When the installation is complete, click **Finish**.

Mapping and Routing

If you purchased the Advanced Mercury Delivery upgrade module (or purchased the Standard Mercury Delivery upgrade module in a previous release), you have mapping and routing. Delivery orders entered in Order Entry and Point of Sale (orders with delivery zones associated with them) display in the Mercury Delivery mapping and routing application so they can be routed. This application allows you to create and maintain delivery zones; automatically create delivery routes using Microsoft® MapPoint® 2004; mark orders as on the truck, delivered, or not delivered; re-route orders that were not delivered; print delivery reports; and more. Microsoft MapPoint 2004 must be installed to use the Mercury Delivery application.

TASK **To access the Mercury Delivery application if you are already logged into FTD Mercury:**

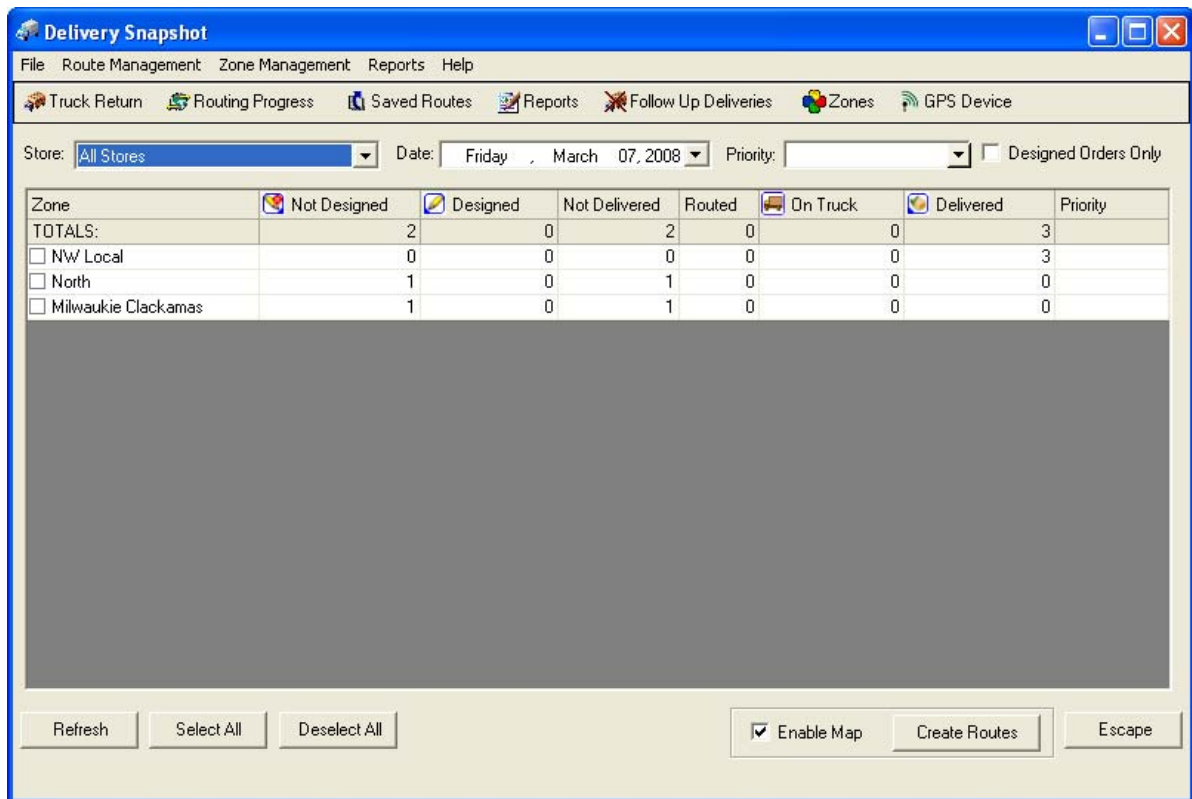
On the **FTD Mercury Main Menu**, click **Delivery**.

TASK **To access the Mercury Delivery application outside of FTD Mercury:**

- 1 Double-click the **Mercury Delivery** icon on your desktop.
- 2 Enter your employee login name and password into the appropriate fields and click **Login**.

The Mercury Delivery application main window (Delivery Snapshot window) appears.

Figure 14-2: Delivery Snapshot Window



Delivery Snapshot

The main Mercury Delivery screen displays all of your delivery zones (except for the Pickup delivery zone) that have delivery orders only for the date displayed in the Date field. You can view orders for other dates by changing the date in the Date field (click the down arrow, then click on the date on the calendar). By default, all orders ready to be routed will display (all Designed and Not Designed orders), regardless of priority.

TIP Under the File menu, there is an option called Auto Refresh. If you select it, the Delivery Snapshot window automatically refreshes every three minutes to ensure the items tracked are up-to-date.

If you want to route Designed orders only, you can click the Designed Orders Only check box so that only Designed orders will display in the routing screen when you are routing orders.

If you want to route orders with specific delivery priorities (delivery times), use the Priority drop-down list and highlight one or more delivery times. When you select a priority, only the delivery zones with orders matching the priority or priorities you selected will appear in the list of delivery zones. If you select blank as the priority, all tickets for that day are displayed. Once you click out of the priority list, the window refreshes to display the tickets matching the priority you selected. When you select a zone and click Create Route, only the orders with the priority that you entered will be available to add to the route.

To route orders, decide which delivery zones the route will include, and then select the delivery zones by clicking in the check box so that a check mark appears. You can also click Select All to select all zones. Then click Create Routes to begin the routing process.

When creating delivery routes, you have the option of displaying a map that outlines your delivery route. If you would like to see the map, make sure Enable Map is checked. Clearing this option will not display a map (because a map does not have to be loaded by the program, you will notice increased program speed if you leave Enable Map unchecked).

Below are descriptions of the fields in this screen:

Table 14-1: Delivery Snapshot Window Fields

Field	Description
Zone	The name of the delivery zone. Only zones that are Local delivery types are displayed.
Not Designed	The number of orders in the delivery zone that have not been marked Designed in Order Entry or Point of Sale.
Designed	The number of orders in the delivery zone that have been marked Designed in Order Entry or Point of Sale.
Not Delivered	The number of unrouted orders in the delivery zone that have not been marked Delivered.
Routed	The number of orders in the delivery zone that have been routed (they are in SAVED routes and have not yet been delivered).
On Truck	The number of orders in the delivery zone that are on the delivery truck (they are in COMPLETED routes and are in process of delivery).
Delivered	The number of orders in the delivery zone that have been marked Delivered (you have marked the orders Delivered in the Truck Return screen, or the driver has marked the order Delivered on the phone [if you have Wireless Delivery Confirmation]).
Priority	The highest priority assigned to any order in the delivery zone.

Click any of the following buttons to jump to another area of the program:

Table 14-2: Delivery Snapshot Buttons

Button	Description
Truck Return	To mark orders Delivered/Not Delivered when the delivery truck returns from a route.
Routing Progress	To check the status of a route in progress. If you have Wireless Delivery Confirmation and GPS, you can view the live location of your truck driver(s).
Saved Routes	To view routes that have been saved but not completed.
Reports	To print delivery reports.
Follow Up Deliveries	To reschedule or update orders that have had delivery problems.
Zones	To create, view, or edit delivery zones.
Create Routes	Select the delivery zone(s), then click this button to create a new route.
GPS Device	Upload your routes to a Garmin GPS device. See Using Garmin GPS Devices with Mercury Delivery on page 14-45 for details.

Delivery Zones

If you have the Mercury Delivery module, you can maintain your delivery zones in the Mercury Delivery application. You can also use the Delivery Zone option in Mercury Administration to maintain your delivery zones (see [Delivery Zone Screen](#) on page 24–43). Changes made to zones in the Mercury Delivery application are copied to Delivery Zone option in Mercury Administration, and vice versa.

IMPORTANT You cannot delete a delivery zone on non-cancelled orders for the current date or future date. Inactive zones are visible in Mercury Delivery, but cannot be used in delivery routes. Inactive zones do not appear in Order Entry or Point of Sale.

There are three ways that you can create delivery zones in the Mercury Delivery application: by map, postal code, or address. In each case, a map is displayed on the screen to help you create your delivery zone. Your store address is also pin pointed on the map.

To create a delivery zone, in the main screen click the Zones button OR click the Zone Management menu, then click Zones. Then continue to one of the following three sections, depending how you want to create a delivery zone:

- » [Creating Zones by Map](#) on page 14–7
- » [Creating Zones by Postal Code](#) on page 14–9
- » [Creating Zones by Address](#) on page 14–10

NOTE After creating or editing your delivery zones, a message appears warning you that you must restart FTD Mercury before your changes can take effect. Restarting FTD Mercury allows you to use your new delivery zones in Order Entry and Point of Sale.

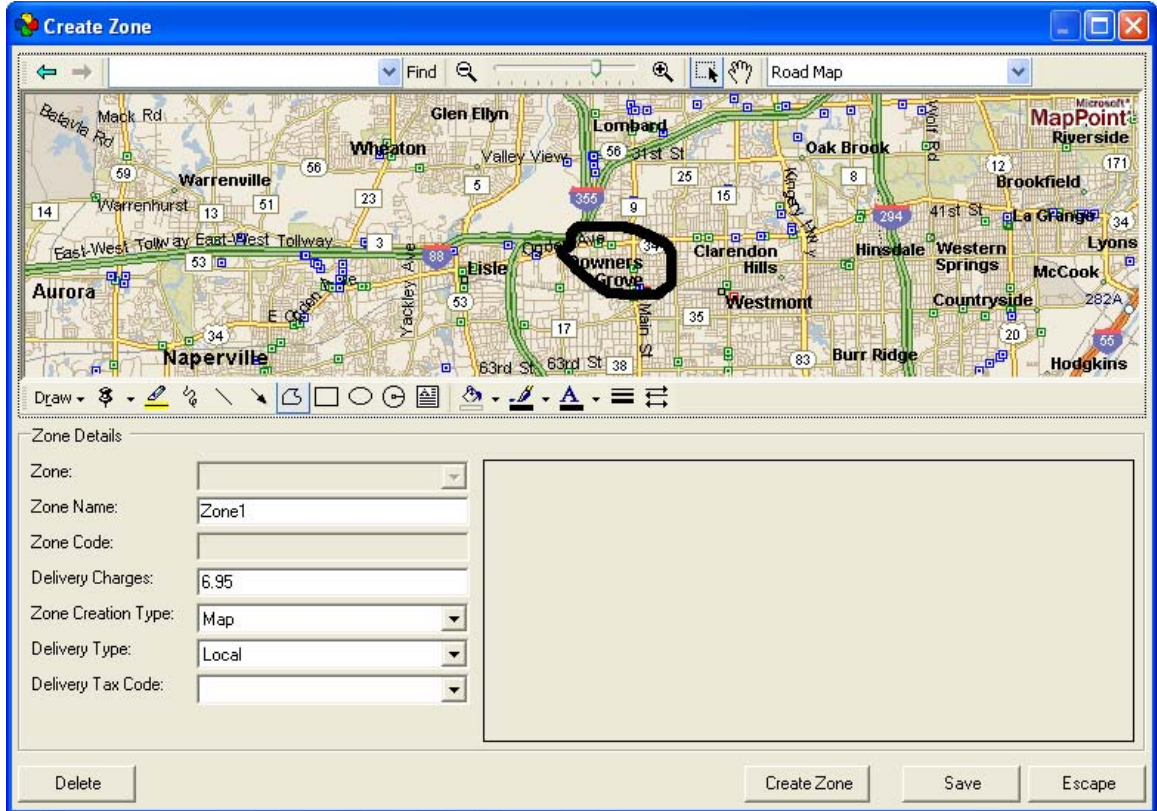
Creating Zones by Map

Creating a delivery zone by map involves actually drawing a zone on a map of your delivery area. If the recipient's address falls within this delivery area in Order Entry and Point of Sale, the delivery charge associated with the delivery zone is added to the order automatically.

TASK **To create a zone by map:**

- 1 Begin by accessing the **Create Zone** window (click the **Zones** button in the main screen).
- 2 Click **Create Zone**.
- 3 At Create operation will clear all the data fields in this window. Do you wish to create a new zone? click **Yes**.
- 4 In the **Zone Name** field, type a name for the delivery zone that will easily identify it in **Order Entry** and **Point of Sale**.
- 5 In the **Delivery Charges** field, type the dollar amount that you want to charge for delivering to this area.
- 6 From the **Delivery Type** list, select either **Local** or **Wire Out**.
- 7 From the **Delivery Tax Code** list, you can select a tax code to associate with this zone. This is an optional setting.
- 8 In the **Zone Creation Type** field, click the arrow and select **Map**.

Figure 14-3: Creating Delivery Zones by Map







- 9 If the map does not display your delivery area, there are three ways that you can zoom to your delivery area:
 - » Type the ZIP code in the **Type place or address** field in the toolbar at the top of the screen, then press **ENTER**. The system zooms to that ZIP code.
 - » Select the grab tool  to grab and drag the map to your delivery area, or use the zoom bar  to zoom in and out until the desired area is displayed. You will want the map zoomed enough to at least see the names of the major streets in the area.
 - » Click the **Find** button to bring you to a desired location. Click the **Find** button to enter an address that you want the map to jump to:

Figure 14-4: Find Window

Enter an address in this window, then click **Find**. The window locates the address, and the program jumps to that location on the map.

- 10 Next, physically draw the delivery zone area on the map. You can use two tools to draw the delivery area: the **Scribble**  or the **Freeform**  (the other tools such as oval and rectangle are not supported). The **Scribble** tool is recommended to use if the area is very irregular and jagged; the **Freeform** tool is recommended to use if the area can be drawn with a series of straight lines (the delivery area in the example above was drawn with the Freeform tool).

Begin by clicking the tool that you want to use, then start drawing. The **Scribble** tool is used by clicking and holding down the mouse button to draw the area. The **Freeform** tool is used by first clicking a beginning point, then moving your mouse to the next point and clicking again to create a straight line (when you are finished drawing the area with the **Freeform** tool, double-click). This process may take some trial and error. If you make a mistake, press the **Esc** key while the drawing object is selected to delete it, then begin again.

TIP

When you are finished drawing a delivery area, you can right-click and then select **Close Curve** from the pop up menu. This ensures that you are closing the circle/square that you have drawn. (You can only use this feature when clicking and dragging to create your delivery area.)

- 11 When you are finished drawing the delivery zone's delivery area, click **Save**. You are alerted that the zone was saved.

Next time you enter the delivery zone screen, the delivery zone will be outlined on the map along with the associated delivery charge.

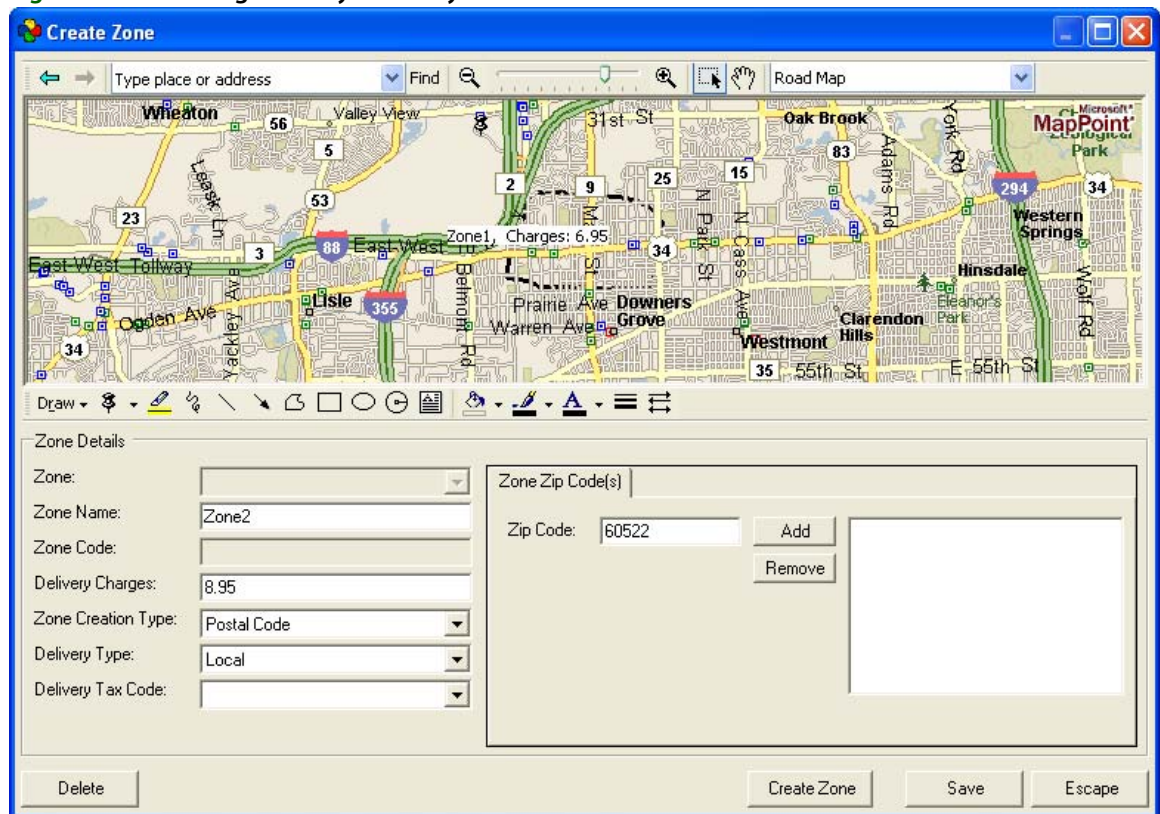
Creating Zones by Postal Code

Creating a delivery zone by postal code allows you to assign the zone to one or more ZIP codes. For example, you can create a delivery zone that delivers to ZIP codes 60563, 60564, and 60565. If the recipient's address matches one of these ZIP codes in Order Entry and Point of Sale, the delivery charge associated with the delivery zone is added to the order automatically.

TASK To create a zone by postal code:

- 1 Within the **Mercury Delivery** application, click the **Zones** button.
- 2 In the **Create Zone** window, click **Create Zone**.
- 3 When you receive a message Create operation will clear all the data fields in this dialog. Do you wish to create a new zone?, click **Yes**.
- 4 In the **Zone Name** field, type a name for the delivery zone. This should be something that will easily identify it in Order Entry and Point of Sale.
- 5 In the **Delivery Charges** field, type the dollar amount that you want to charge for delivering to this area.
- 6 From the Delivery Type list, select either Local or Wire Out.
- 7 From the Delivery Tax Code list, you can select a tax code to associate with this zone. This is an optional setting.
- 8 In the **Zone Creation Type** field, click the arrow and select **Postal Code**. The **Zone Zip Code(s)** tab appears on the right side of the window.

Figure 14-5: Creating Delivery Zones by Postal Code



- 9 Type a ZIP code you want to add in the **Zip Code** field and click **Add**. Repeat this step until all the ZIP codes you want included are in the list.
- 10 When you are finished adding ZIP codes, click **Save**. You are alerted that the zone was saved.

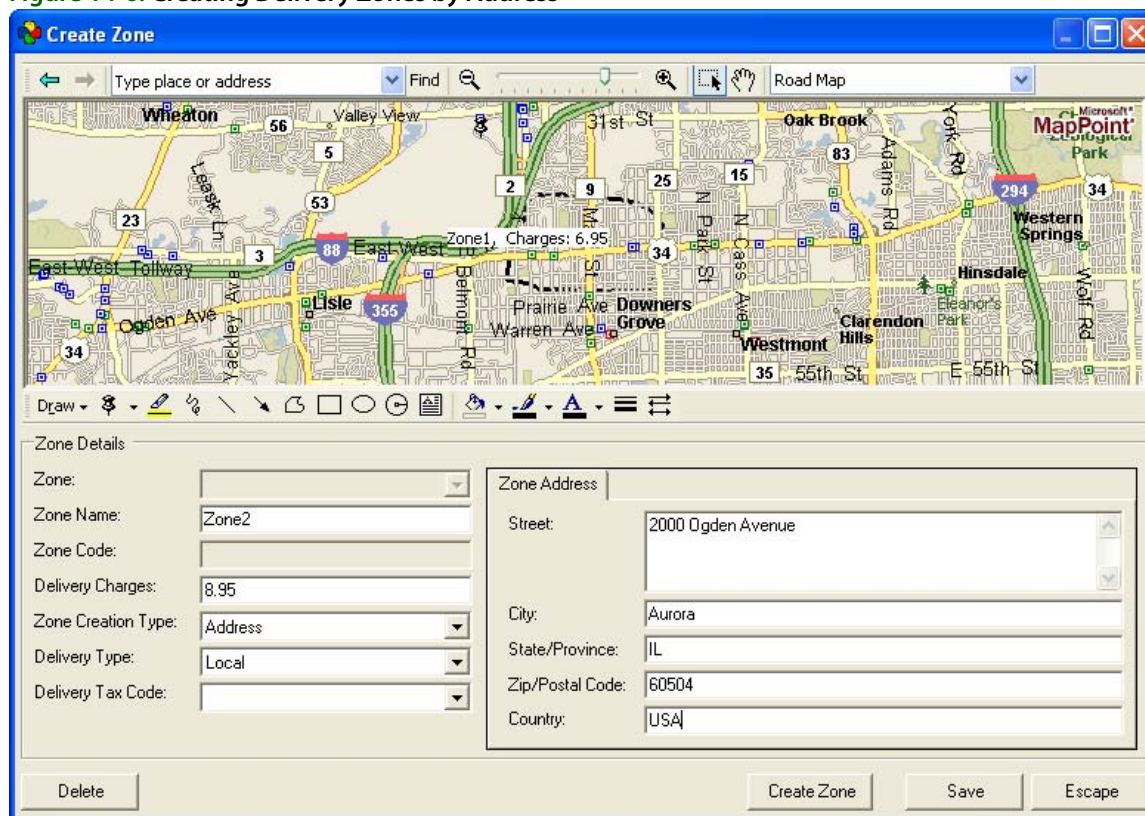
Creating Zones by Address

You may want to create a delivery zone with a particular address so that when you enter that address in **Point of Sale** or **Order Entry**, a certain delivery charge is added to the order. For example, you might want to charge \$8.00 to deliver to your local hospital. When the hospital address is entered in the recipient section of **Order Entry** or **Point of Sale** (the hospital is selected from a facility search or the address is typed correctly and verified), the correct delivery zone and charge is

selected. By creating a delivery zone with this hospital's address, the \$8.00 delivery charge is added to the order, regardless if this hospital is located within a different delivery zone.

- 1 Begin by accessing the **Create Zone** window (click the **Zones** button in the main screen).
- 2 Click **Create Zone**.
- 3 At Create operation will clear all the data fields in this dialog. Do you wish to create a new zone? click **Yes**.
- 4 In the **Zone Name** field, type a name for the delivery zone that will easily identify it in Order Entry and Point of Sale.
- 5 In the **Delivery Charges** field, type the dollar amount that you want to charge for delivering to this address.
- 6 From the **Delivery Type** list, select either **Local** or **Wire Out**.
- 7 From the **Delivery Tax Code** list, you can select a tax code to associate with this zone. This is an optional setting.
- 8 In the **Zone Creation Type** field, click the arrow and select **Address**. The **Zone Address** section appears on the right side of the window.

Figure 14-6: Creating Delivery Zones by Address



- 9 Type the address in the **Street**, **City**, **State/Province**, **Zip/Postal Code**, and **Country** fields.
- 10 When you are finished typing the address, click **Save**. You are alerted that the zone was saved.

Removing Delivery Zones

You cannot remove a delivery zone that is used for current or future orders, unless the order has been cancelled. You also cannot remove a delivery zone that is used in a Standing Order Template.

TASK To remove a delivery zone in Mercury Delivery:

- 1 Within the **Mercury Delivery** application, click the **Zones** button.
- 2 In **Zone Details**, from the **Zone** list, select the zone you want to remove.
- 3 Click **Delete**.
- 4 Confirm the deletion.
- 5 Click **Escape** to close the **Create Zone** window.

You must restart FTD Mercury before the change will be seen in **Order Entry** and **Point of Sale**.

Creating Delivery Routes

A delivery route is a delivery trip that a driver makes to deliver multiple orders. A delivery route can consist of any number of orders within multiple delivery zones. Mercury Delivery assumes that you want to create routes only for orders with the same delivery date, so the Delivery Snapshot window lists zones with orders only for a single date. However, you include orders in your delivery route with multiple delivery dates by adding these orders to the route when you create it.

Delivery routes can only be created for delivery orders entered in Order Entry and Point of Sale. Pick up and carry out orders do not display in the Mercury Delivery application. If you change a delivery order to a pick up order in Order Entry or Point of Sale, the pick up order is removed from the Mercury Delivery application and from your delivery route, unless you already marked that route complete.

To create a delivery route, first you select the orders that will go out on that trip, then map them in the order that you want them delivered. The goal is to make the delivery trip as fast and efficient as possible, delivering all of your orders on time. The program suggests a delivery route for you automatically, and can calculate the fastest or shortest delivery route. It also maps the route and calculates driving directions (turn by turn).

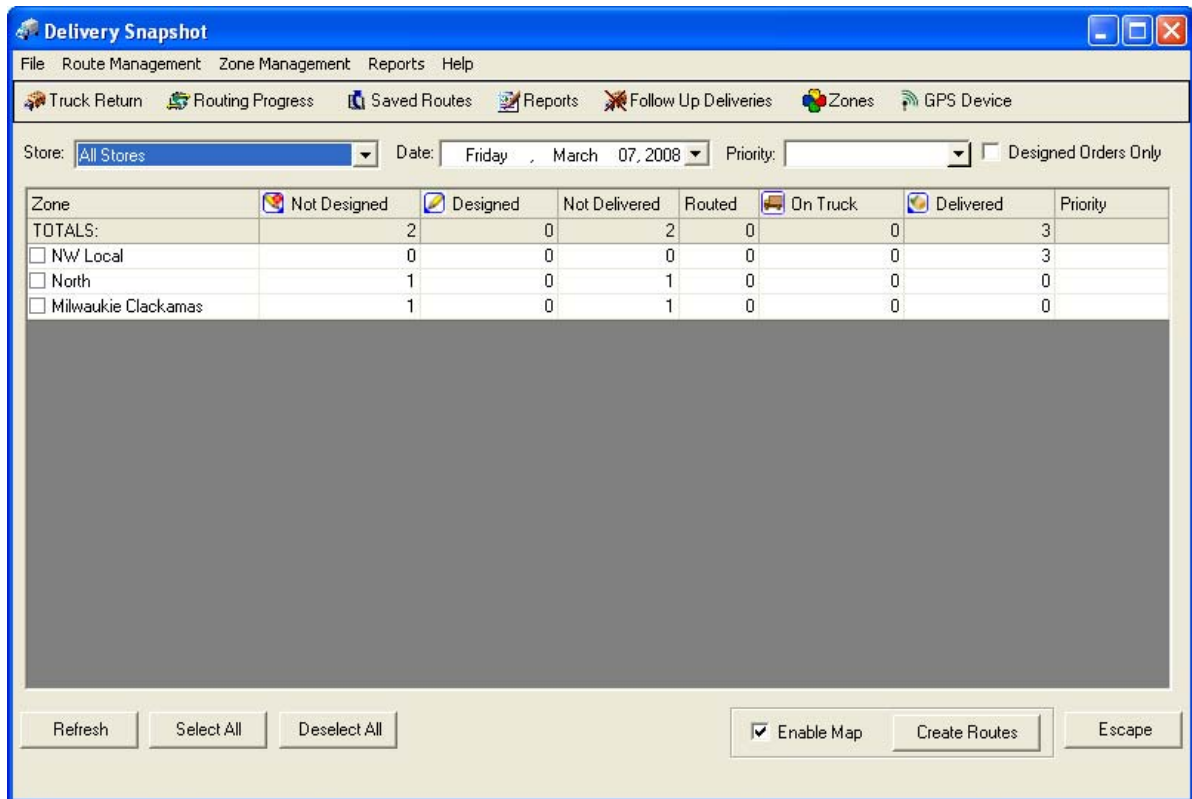
There are four steps to creating a delivery route:

- » [Step 1: Selecting Zones](#)
- » [Step 2: Adding Orders to the Delivery Route](#)
- » [Step 3: Printing the Map](#)
- » [Step 4: Saving the Route](#)

Step 1: Selecting Zones

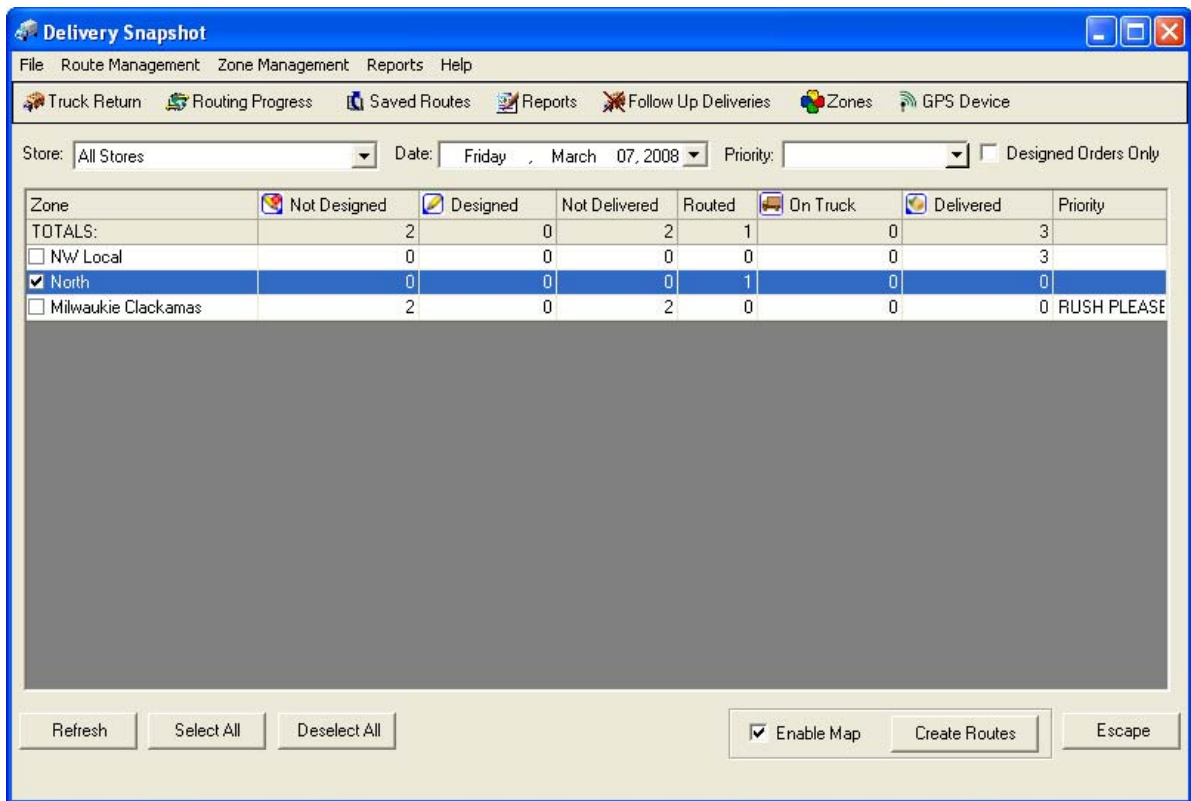
The first step to creating a delivery route is to select the delivery zone(s) that include the orders that you want to deliver. You do not have to route all of the orders within the zone(s); you are just selecting the zones at this point.

Figure 14-7: Delivery Snapshot Window—No Zones Selected



None of the delivery zones that have deliveries for today's date are selected when you open the Mercury Delivery application. (To route orders for a different delivery date, change the Date field.) Decide which delivery zones this route will include, and then select the delivery zones by clicking in the check box so that a check mark appears. You can also click Select All to select all zones.

Figure 14-8: Delivery Snapshot Window—Zones Selected



Again, you are only selecting the zones at this point. You do not have to route all of the orders within these zones.

IMPORTANT Zones can be marked as inactive in Mercury Administration. These zones will still appear in Mercury Delivery, but will not be available for delivery routes.

When creating delivery routes, you have the option of displaying a map that outlines your delivery route. If you want to see the map, make sure **Enable Map** is checked. Clearing this option will not display a map (because a map does not have to be loaded by the program, you will notice increased program speed if you leave **Enable Map** unchecked).

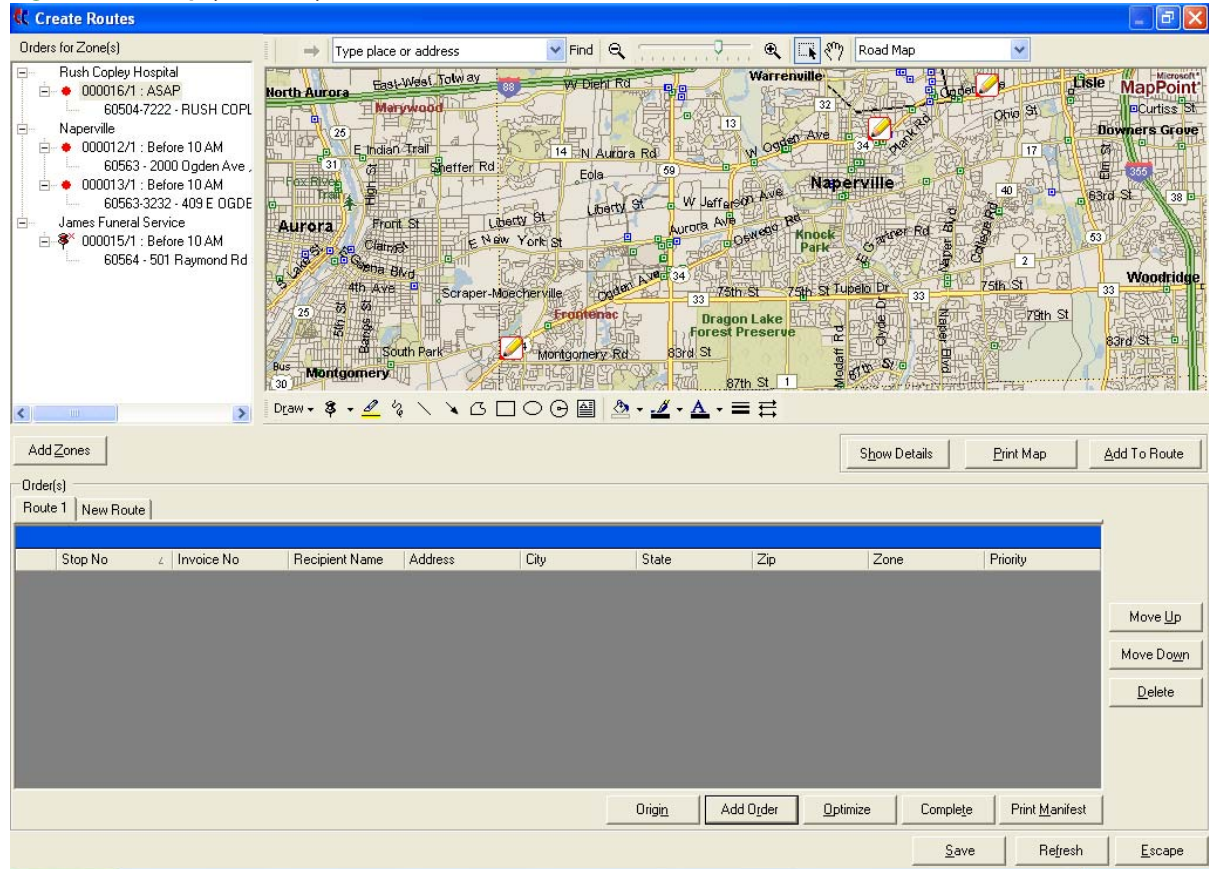
When you are finished selecting delivery zones, click the **Create Routes** button OR select **Route Management** from the menu bar, then click **Create Routes**. This takes you to the **Create Routes** screen where you will add orders to your delivery route.



Step 2: Adding Orders to the Delivery Route


The Create Routes screen lists all of the orders within the delivery zones that you selected, along with a map indicating the location of each of the delivery stops. At this point no orders have been added to the route.

If you do not have Address Verification in FTD Mercury, or if an order's address was not verified in FTD Mercury, Microsoft MapPoint uses its own address verification feature to try and verify the address. If MapPoint cannot verify the address, it warns you that the order cannot be verified (MapPoint cannot suggest close matches). If the address cannot be verified by MapPoint, you can still add the order to the route, however the order is not added to the delivery map and is not included in the driving instructions.





Figure 14-9: Empty Delivery Route



In the Orders for Zone(s) section in the left pane, Designed orders are marked with a circle  icon and Not Designed orders are marked with a square icon  (these icons display in red if delivery times are associated with them; otherwise they display in black). Each of these orders is also pin pointed on the map.

If an address has not been verified by FTD Mercury and/or Microsoft MapPoint, the order displays in the order list with a cancelled push pin icon . The order is not placed on the map and is not included in the driving instructions, but you can add the order to your delivery route.

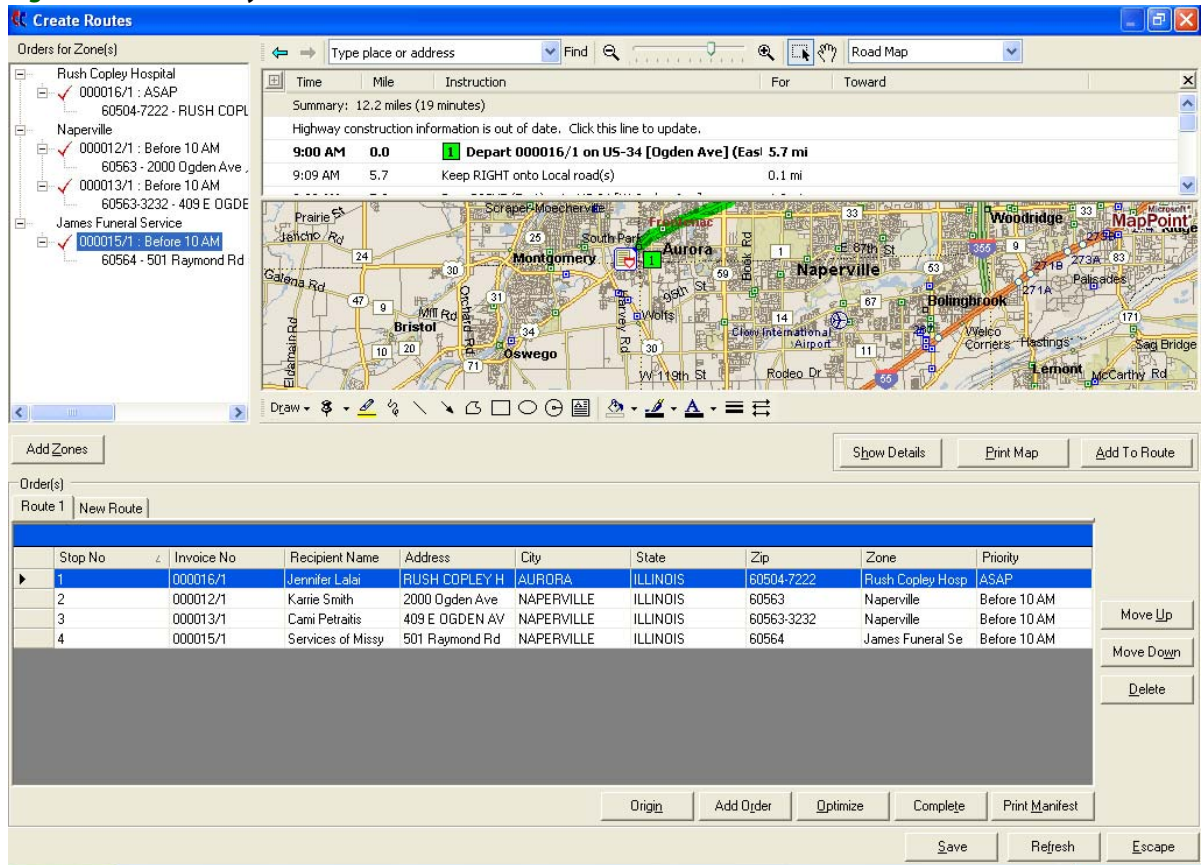
TASK To add an order to the route, you can do any one of the following:

- » Right-click on the  or  icon next to the order (in the left pane) and then click Add To Route.
- » Click on the  or  icon next to the order (in the left pane) and drag it to the dark gray area of the empty route list at the bottom of the window.
- » Use the Freehand tool to select the order on the map, then click Add to Route. When prompted for the order number, type the order number.

You will see the order appear in the list at the bottom of the window, and a check mark displays next to the order in the Order for Zone(s) section in the left pane.

NOTE The Store column displays the store from which the order was placed. If you are in a multi-store environment, this is helpful so your driver knows which store at which to pick up the arrangement.

Figure 14-10: Delivery Route with Orders

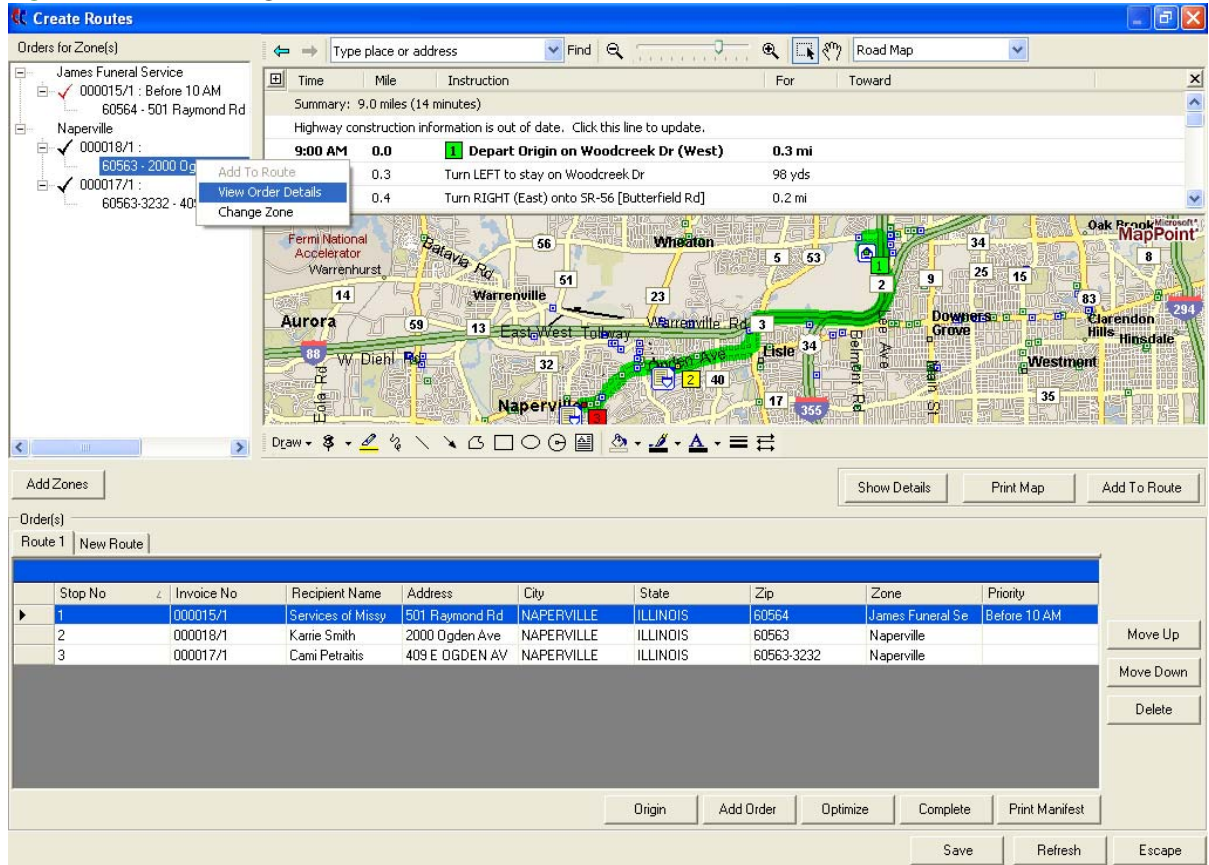


As you add orders, the map automatically creates a suggested delivery path and the driving directions (above the map) are updated. The orders are numbered on the map in the order that the program recommends delivery. The route origin displays as the first stop in green (see [Changing the Route Name or Origin](#) on page 14-18 to learn how to set the origin), the last stop displays in red, and all stops in between are numbered in yellow.

Viewing Order Details (Products)

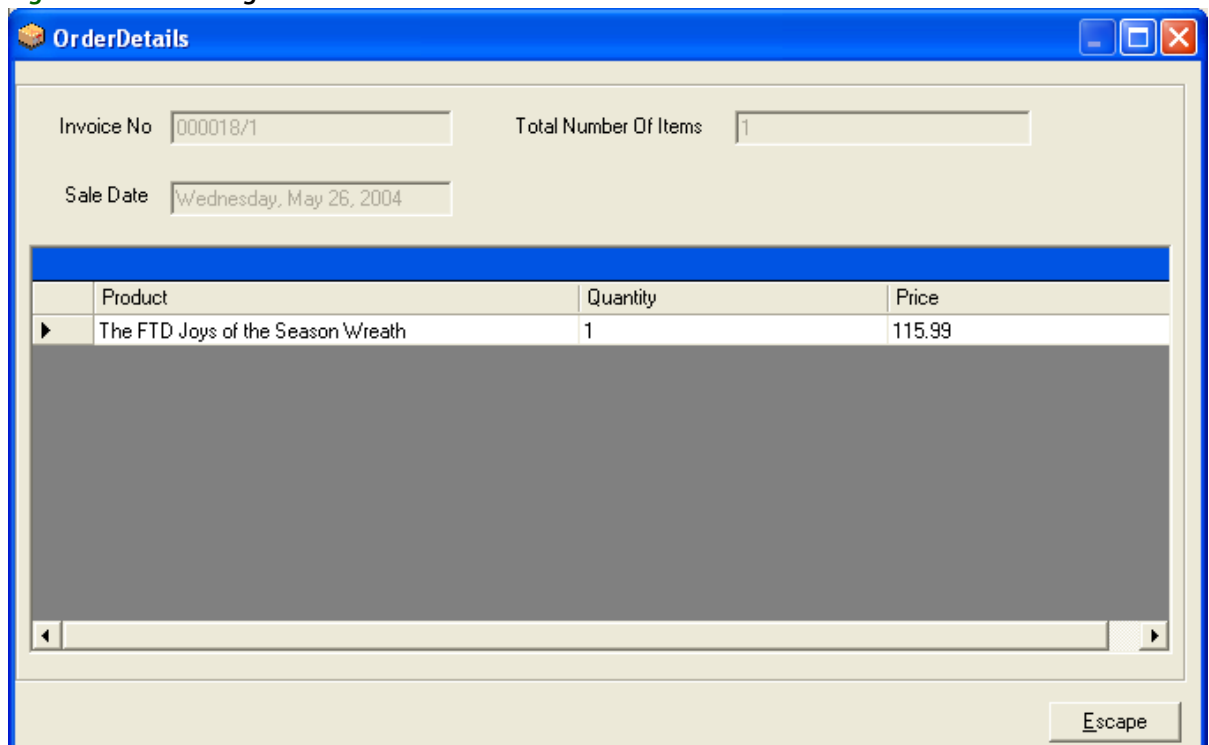
TASK To view the details of an order (such as invoice number, sale date, or products) within Mercury Delivery:
Right-click the order and click **View Order Details**.

Figure 14-11: Accessing Order Details



The program displays general order information and lists all of the products to be delivered:

Figure 14-12: Viewing Order Details

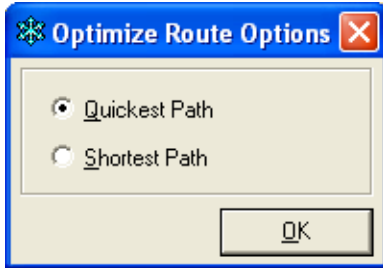


Click **Escape** to return to the **Create Routes** screen.

Changing the Delivery Path

There are two ways that you can change the delivery path for your delivery driver. If you want the system to find the shortest or quickest route, click **Optimize**:

Figure 14-13: Optimize Route



Select **Quickest Path** or **Shortest Path** and then click **OK**. The map and driving directions are updated accordingly.

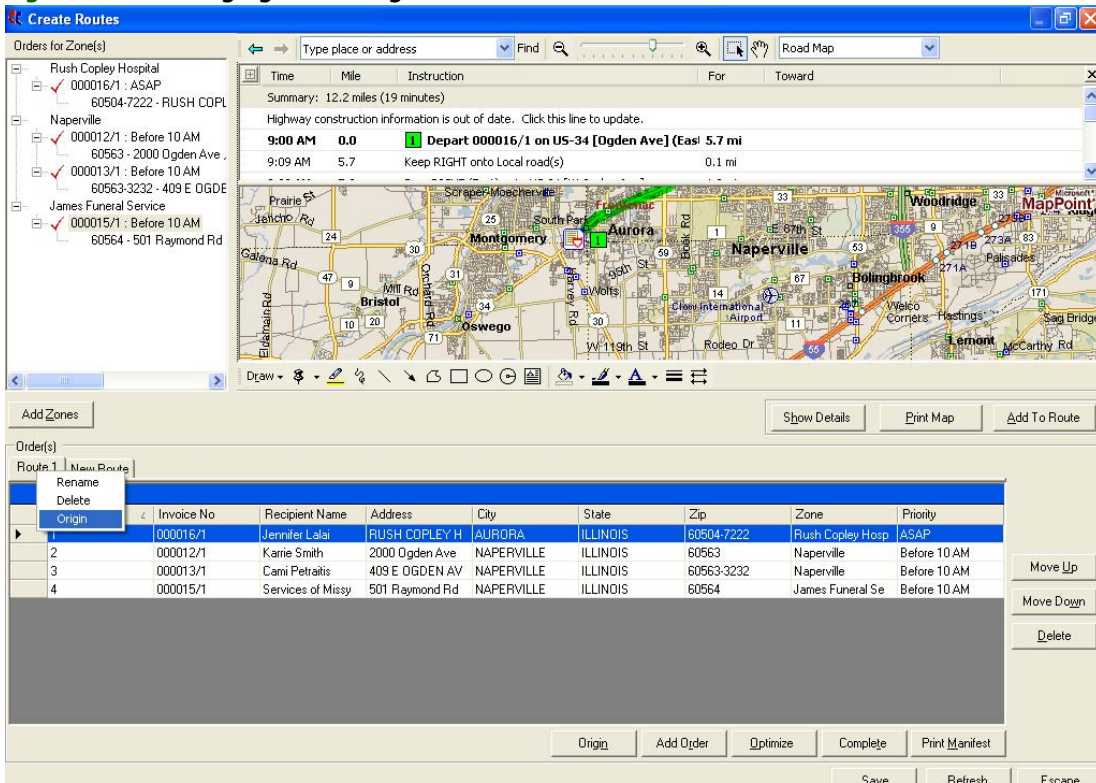
You can also change the stop order in the delivery route by rearranging the delivery stops. To do this, highlight a delivery stop in the Order(s) section at the bottom of the screen, then click the **Move Up** or **Move Down** buttons to change the stop order.

Changing the Route Name or Origin

For the map and driving directions to be correct, the driver's origin must be correct. Most likely the driver's origin is your shop address, but you can specify any other address.

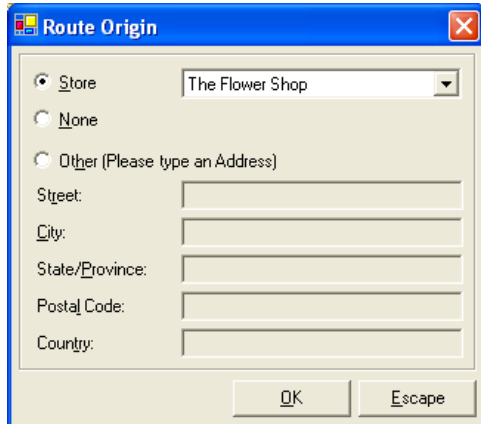
To change the origin of the route, click the **Origin** button, or right-click on the route tab and then click **Origin**:

Figure 14-14: Changing Route Origin



The **Route Origin** window displays:

Figure 14-15: Specifying a Route Origin



The screenshot shows a dialog box titled "Route Origin". It has a blue title bar with a close button (X) on the right. The dialog contains three radio buttons: "Store" (which is selected), "None", and "Other (Please type an Address)". The "Store" option is followed by a dropdown menu that currently displays "The Flower Shop". Below the radio buttons are five text input fields, each with a label: "Street:", "City:", "State/Province:", "Postal Code:", and "Country:". At the bottom of the dialog are two buttons: "OK" and "Escape".

Indicate if you want the route to originate from the **Store address**, or **Other**. If you select **Other**, type an address. Click **OK** when finished.

To change the name of the route, right-click on the **Route** tab, and click **Rename**. You are prompted for a new name for the route.

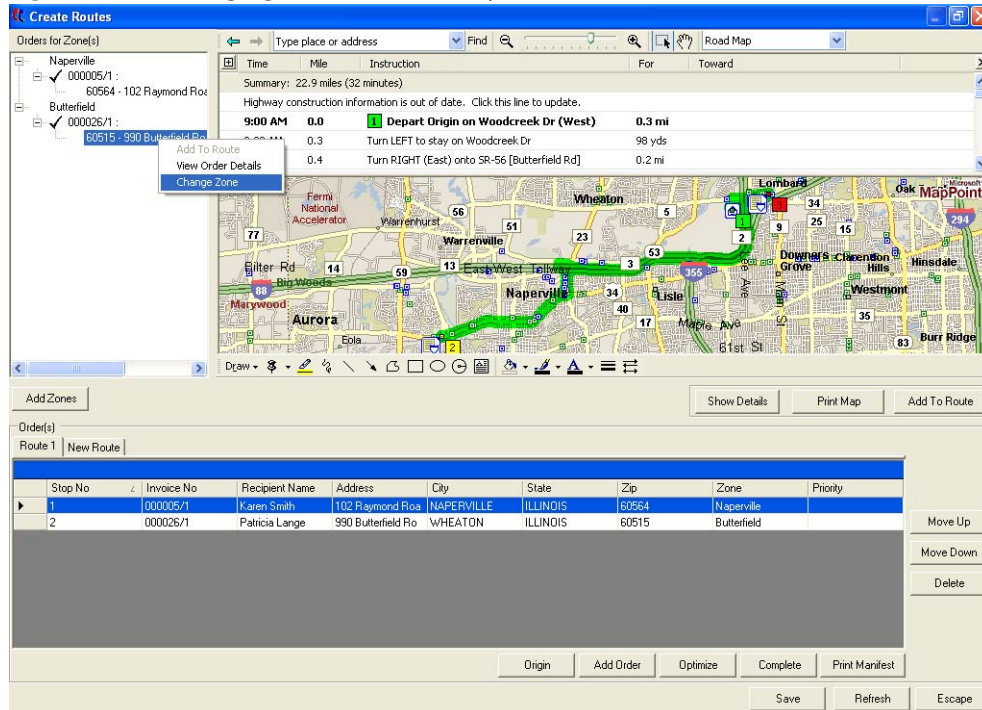
Changing an Order's Delivery Zone

While you are creating or editing delivery routes, you can change an order's delivery zone. The order remains in the route, however the delivery zone name changes in the list of orders. Changing an order's delivery zone in Mercury Delivery also changes the delivery zone on the order. However the delivery charge on the order does not change (if a different delivery charge is associated with the new delivery zone).

TASK To change an order's delivery zone:

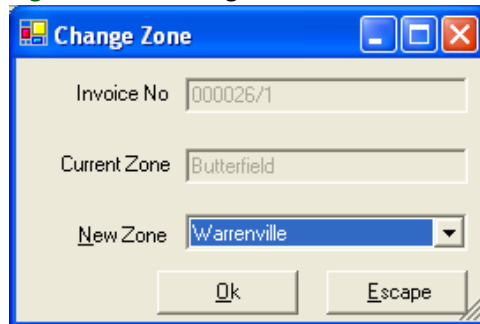
- 1 Right-click on the order in the Orders for Zone(s) list, then click Change Zone from the pop up menu:

Figure 14-16: Changing an Order's Delivery Zone



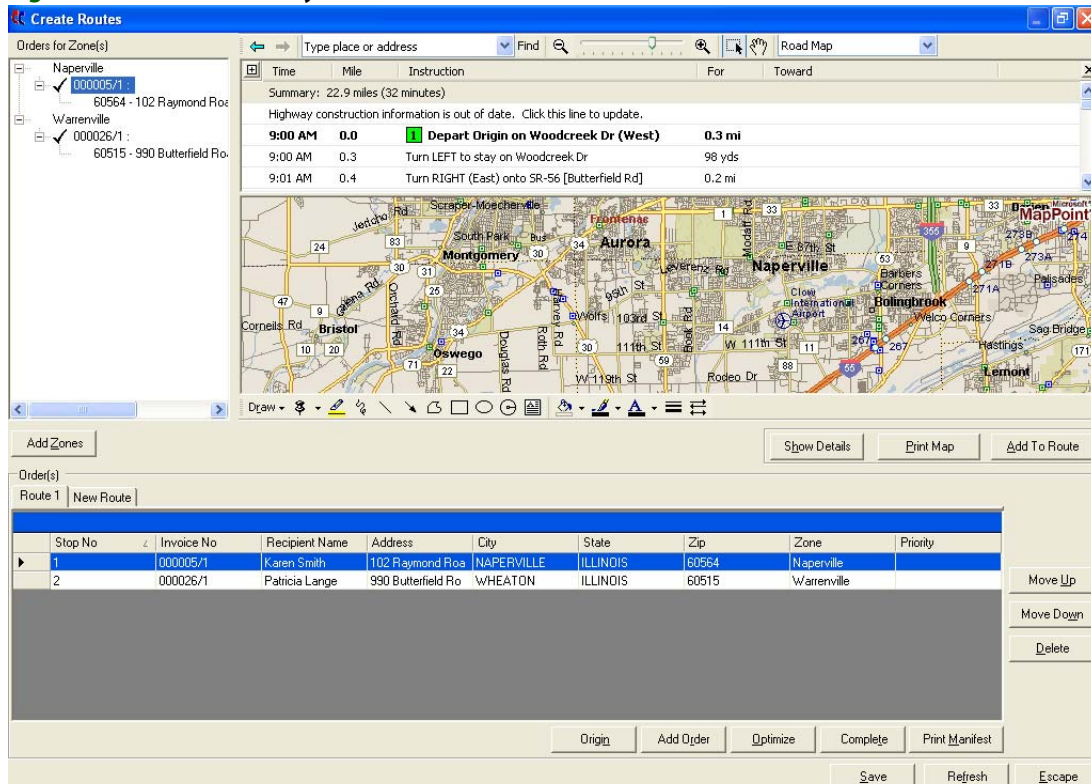
- 2 The Change Zone window displays. Select New Delivery Zone

Figure 14-17: Change Zone Window



- 3 In this window, select the new delivery zone from the drop-down list in the New Zone field, then click OK. The order displays under the new delivery zone.

Figure 14-18: New Delivery Zone



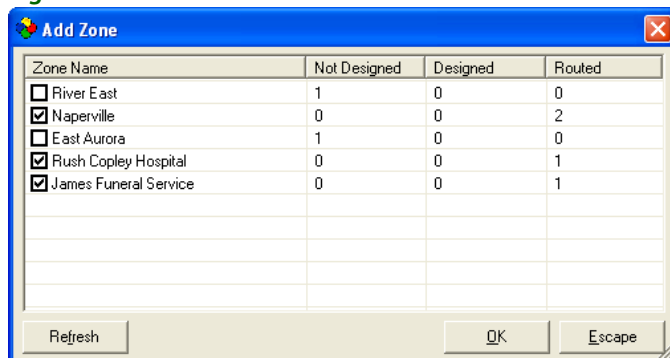
Adding Additional Orders to the Route

You can add orders to the delivery route that do not already display in the Orders for Zone(s) section on the left hand side of the screen. You can either add all orders within a particular delivery zone, or you can add orders individually by order number.

NOTE You can only add orders to a route when you are in the process of creating the route in the Create Routes screen. If you want to add an order to a route that has already been completed, see [Viewing Routing Progress](#) on page 14–24 for instructions and limitations.

To add delivery zone, click the **Add Zones** button. This brings up all of your delivery zones that have orders available to route.

Figure 14-19: Add Zones



The delivery zones that you are currently routing are checked. To add another delivery zone, click on that zone so a check mark appears, then click **OK**. All orders within that delivery zone are added to the screen and are available to route.

To add by order number, click the Add Order button in the Create Routes window. When you are prompted for the order number, type the order number and then click OK. You can also use a bar code scanner, if available, to populate the order number field by scanning the bar code on the invoice. If the order's store or delivery date are different from the store and date for the route, you will be asked to confirm your decision to include the order on the route. The order is added to the screen and is available to route.

Removing Orders from the Route

Orders that are in your delivery route are listed at the bottom of the screen in the Order(s) section. To remove an order from that list, highlight it and then click **Delete**. In the Order for Zone(s) section, that order then is marked as Not Delivered (● if Designed or ■ if Not Designed).

Step 3: Printing the Map

You will have the option to print driving directions and the route manifest (routing slip) when you click **Complete** to complete the route. However you are not prompted if you want to print the map. If you want to print the map (as it appears in the **Create Routes** window), click the **Print Map** button before clicking **Complete**.

NOTE The manifest also displays the store from which the order was placed. If you are in a multi-store environment, this is helpful so your driver knows which store at which to pick up the arrangement. The manifest also shows the quantity of products to be delivered, and if multiple recipients are listed on an order, the names of the recipients are included on the manifest as well.

TIP You can print the map later while the route is in progress by clicking the Print Map button on the Routing Progress screen (see [Viewing Routing Progress](#) on page 14-24).

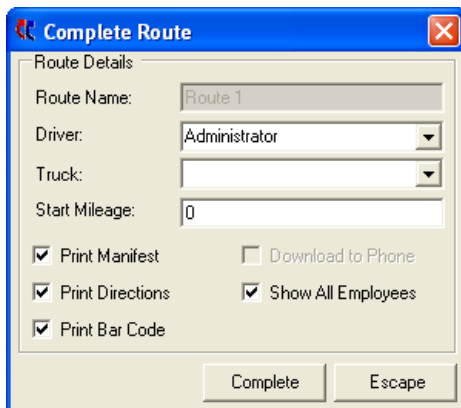
Step 4: Saving the Route

When you are finished creating the delivery route, you can either save the route to edit later, or you can complete it if the delivery route is final and the truck is ready to leave.

To save the route to complete later, click the **Save** button. The routing slip, driving directions, and map are not printed. This is a great feature during busy holiday periods if you want to prepare delivery routes ahead of time. See [Editing Saved \(Incomplete\) Routes](#) on page 14-23 to learn how to bring up and edit a saved route.

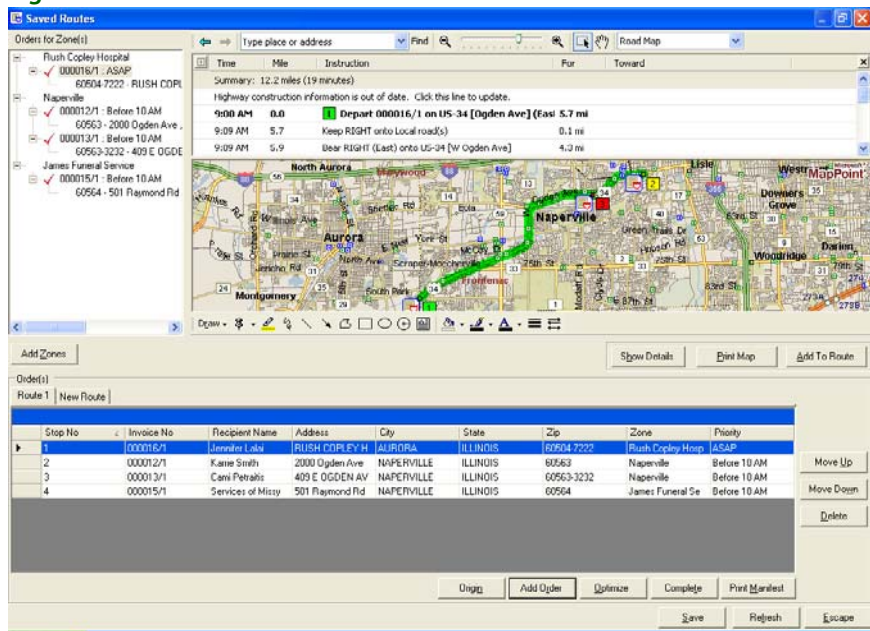
To complete the route (the delivery slip and driving directions print, and the route cannot be changed), click the **Complete** button. You are prompted for driver and truck information.

Figure 14-20: Route Complete



To bring up a route on the screen, check the check box next to that route so that a check mark appears, then click **OK**. The Saved Routes screen appears (which is a replica of the **Create Routes** screen).

Figure 14-22: Saved Routes Screen



NOTE

If a recipient address has not been verified in Microsoft MapPoint, you receive the following message when accessing the orders on the Saved Routes screen: “The following orders are not added to the map because they contain invalid address” (followed by the order numbers). You can add orders with unverified addresses to the delivery route, however they are not placed on the map and are not included in the driving instructions.

On this screen, add or remove orders, print the map/manifest, etc. When you are finished making changes, you can click **Save** if you plan on making more changes later, or click **Complete** if the route is complete (no further changes can be made).

Viewing Routing Progress

The **Routing Progress** option lists all of the delivery routes for the chosen date and displays the status of each delivery route. From this window you can view the details of the delivery route or modify the route by adding or removing orders for example.

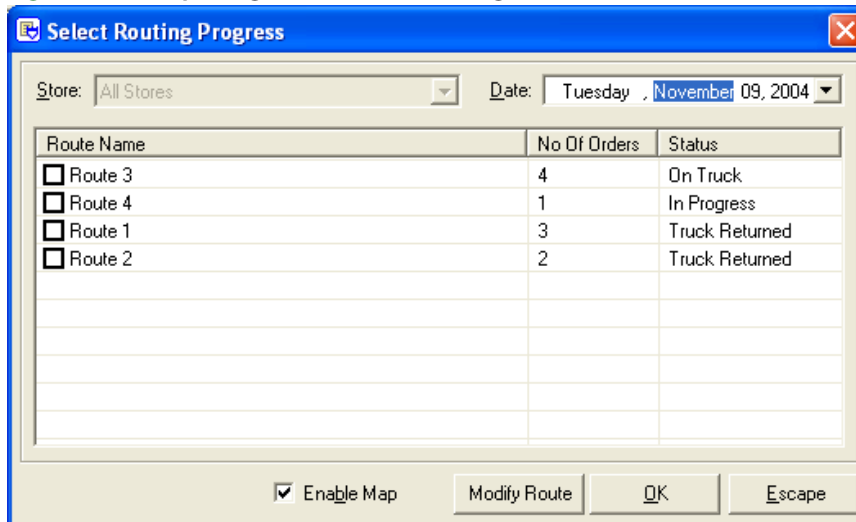
If you have Wireless Delivery Confirmation, you can view the progress of a delivery route while the truck is on delivery. When a delivery driver updates the status of a delivery on his or her wireless phone, the information is updated to FTD Mercury automatically. Anytime while that driver is on route, you can look up the status of the route and see which orders have been delivered and which have not. If you have GPS, you can view the live location and delivery path of the delivery driver.

TASK

To view the progress of a delivery route:

On the toolbar, click the **Routing Progress** button. Alternatively, on the **Route Management** menu, click **Routing Progress**.

Figure 14-23: Opening a Route to View Progress



Below is a list of valid status types for this screen:

Table 14-4: Routing Status Types

Status	Description
On Truck	The delivery route has been completed. No changes have been made to the orders in the route (such as marked Delivered or Not Delivered). This type of delivery route can be updated by selecting the route and then clicking Modify Route (you can add orders to the route, change the delivery order, etc.).
Truck Returned	The Truck Return process for the delivery route has been completed. The orders in the route have all be marked Delivered or Not Delivered, either in the Mercury Delivery application or on the Wireless Delivery phone. No changes can be made to this type of delivery route.
On Phone	If you checked Download to phone when you completed the delivery route, the route has the On Phone status. No changes can be made to this type of delivery route.
In Progress	If you have made changes to the route, such as marked some orders Delivered or Not Delivered, the route has the In Progress status. No changes can be made to this type of delivery route.

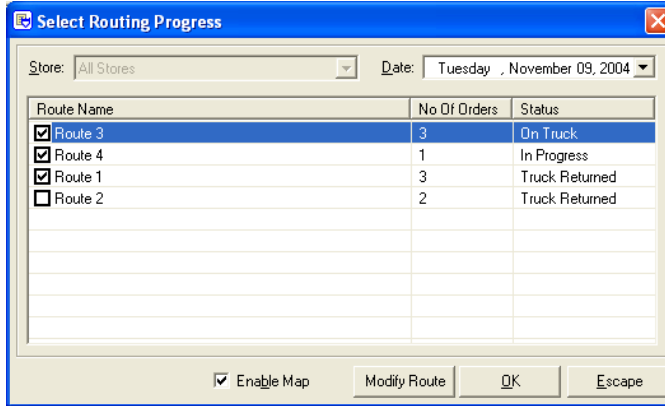
Viewing the Route Details (View Only)

You can only modify a route that has the **On Truck** delivery status (see [Modifying a Delivery Route](#) on page 14-27). You can however view any route in a view-only mode.

TASK To view the route details:

- 1 From the menu bar click the **Routing Progress** button, OR click **Route Management** in the menu bar, then click **Routing Progress**.
- 2 Check the check box next to the route(s) so that a check mark appears. You can select multiple routes.

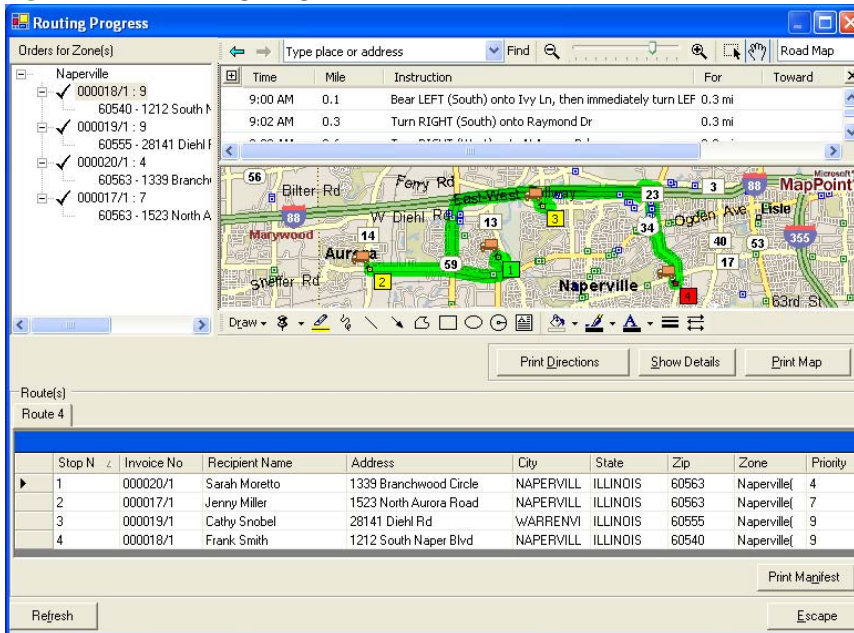
Figure 14-24: Viewing Route Details



3 With the route(s) selected, click the OK button.

After clicking OK, the Routing Progress screen appears (which is similar to the Create Routes screen, however the screen is read-only).

Figure 14-25: Routing Progress Screen




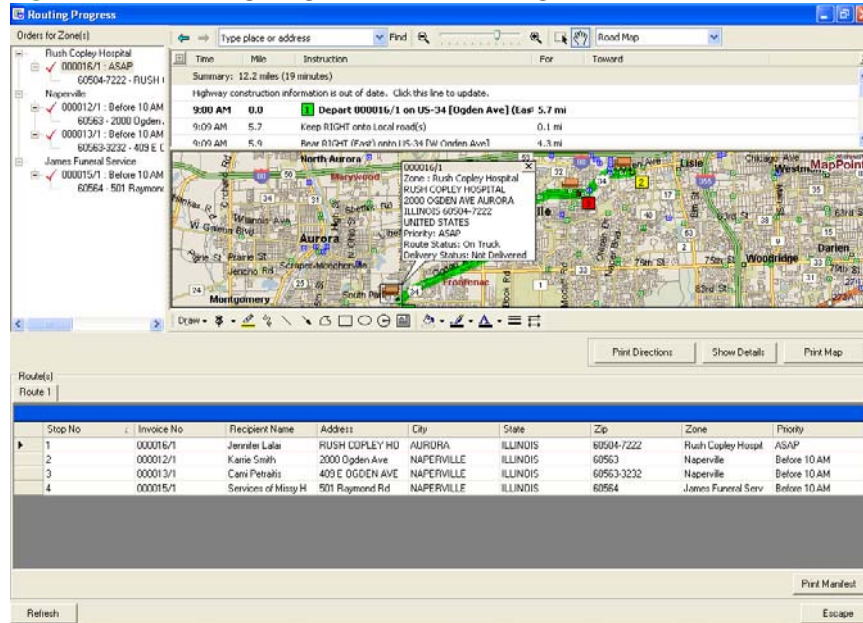
This read-only screen allows you to print the driving directions, map, or delivery manifest. Each stop is marked with a truck icon , indicating that the order is on the truck. To view the details of a particular stop, you can double-click on the truck icon for that stop.

Figure 14-26: Routing Progress Screen: Viewing Details



If you have GPS, you can view the live location of the driver while he or she is on route. Blue dots indicate the trail of the delivery driver, and yellow dots indicate the direction of the delivery truck.

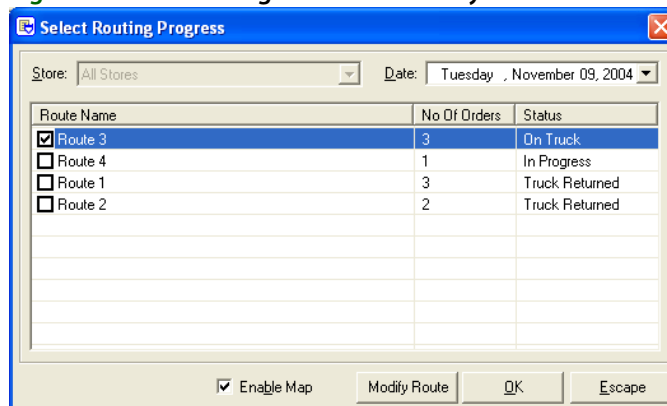
Modifying a Delivery Route

If the route has a status of **On Truck**, you can make changes to that delivery route, such as add or delete orders, change the delivery stop order, etc.

TASK To modify a delivery route:

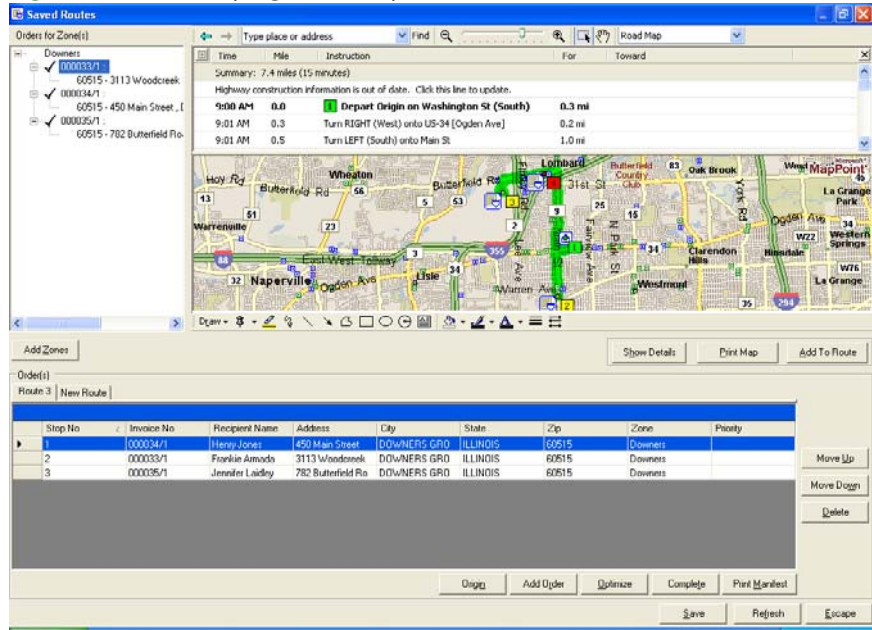
- 1 From the menu bar click the **Routing Progress** button, OR click **Route Management** in the menu bar, then click **Routing Progress**.
- 2 Select the route that you want to modify. Remember that only the routes with the **On Truck** delivery status may be modified, and you can modify only one route at a time.

Figure 14-27: Selecting a Route to Modify



- 3 With the route selected, click **Modify Route**. The route opens so that you can make changes.

Figure 14-28: Modifying a Delivery Route



At this point make the required changes and then complete the route again by clicking the **Complete** button or save the route clicking the **Save** button. Note that if you click **Save**, the route is listed under **Saved Routes** option and not the **Routing Progress** option.

If you click **Escape** without making any changes to the route, the route is not updated and remains as originally routed.

Truck Return

When a truck returns from a delivery route, you must open the delivery route in Mercury Delivery and mark orders as delivered or not delivered. If orders have been delivered, you must enter the delivery time of the order so that orders are considered delivered.

If an order is marked Delivered and the delivery time is specified, the routing process is complete for that order. Or, you can simply indicate the TIME the order was delivered and this marks the order Delivered automatically. The order is marked as **Delivered** on the delivery date of the order, not the system date (if you are marking orders **Delivered** the next day for example).

If an order is marked **Not Delivered**, it is considered a “problem” order and you can bring it up later to update the delivery status (see [Follow Up Deliveries](#) on page 14–30).

If you have the Wireless Delivery Confirmation upgrade, your delivery drivers can update the delivery status of the orders while they are on route. On the delivery phones, they can mark a delivery as Delivered or Not Delivered by selecting a delivery status code for the delivery. The information is updated to the Mercury Delivery application automatically. Therefore it is not necessary to mark orders Delivered or Not Delivered manually in the Truck Return screen, unless you want to change settings or add comments.

Handling Truck Returns

TASK To handle a truck return:

- 1 Open Mercury Delivery.
- 2 In the **Delivery Snapshot** window, enter the date for which you want to handle a truck return.

- 3 Click the **Truck Return** button on the toolbar. A list of delivery routes for the date you selected in the **Delivery Snapshot** window appears.
- 4 Select the route belonging to the returning truck. To find the route that contains a specific order, enter the order number in the Find Order # field. You can also use a bar code scanner, if available, to populate the order number field by scanning the bar code on the invoice. If the order contains tickets from more than one route, both routes will be highlighted and you will need to select a route.
- 5 Click **Details**. The **Truck Stop Details** window opens.
- 6 In the **Truck Stop Details** window, mark each order with a delivery code. You can do this by clicking the cell in the **Delivery Status** column so an arrow appears, and then clicking the arrow to select a delivery code from that list.

TIP

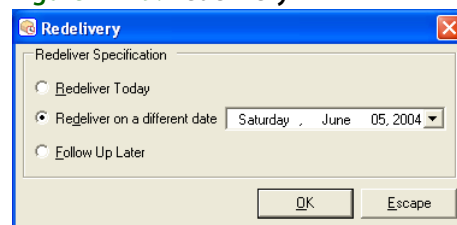
You can quickly select an option in a drop down menu by typing the first letter of that option (for example, if you type **d** it highlights **delivered**).

If the delivery code is a **Delivered** code, the order displays a green check mark next to it, indicating that it was delivered. If the delivery code is a **Not Delivered** code, the order displays a red cross mark next to it, indicating that it was not delivered. You are prompted for redelivery information for **Not Delivered** orders.

Table 14-5: Redeliver Specifications

Redeliver Specification	Description
Redeliver Today	Removes the order from the Truck Return screen and moves it to the list of today's deliveries where it can be re-routed.
Redeliver on a different date	Removes the order from the Truck Return screen and moves it to the list of that day's deliveries where it can be re-routed. The delivery date change is posted to order notes.
Follow Up Later	Removes the order from the Truck Return screen and moves it to the Follow Up Deliveries screen.

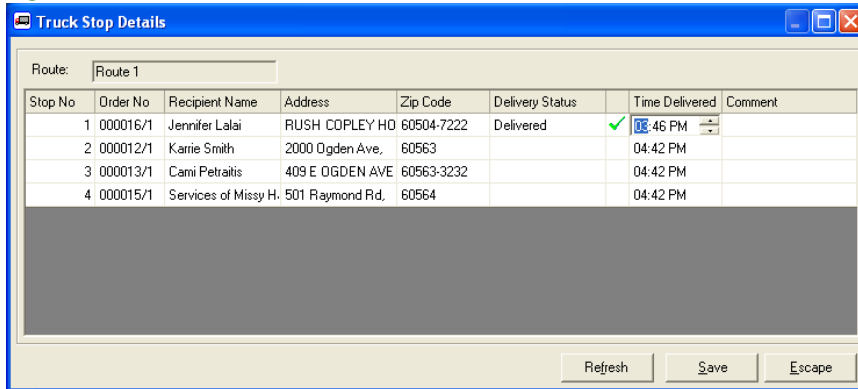
Figure 14-29: Redelivery

**NOTE**

If an order is re-routed, the order is still listed in the history of the original delivery route (when printing the original route in the Reprint Route Report or the Delivery Trip Analysis report).

- 7 Next, type the **TIME** the order was delivered in the **Time Delivered** column (the delivery time is required for the order to be marked **Delivered**). To indicate the time an order was delivered, click inside of the **Time Delivered** column so that the current time displays.

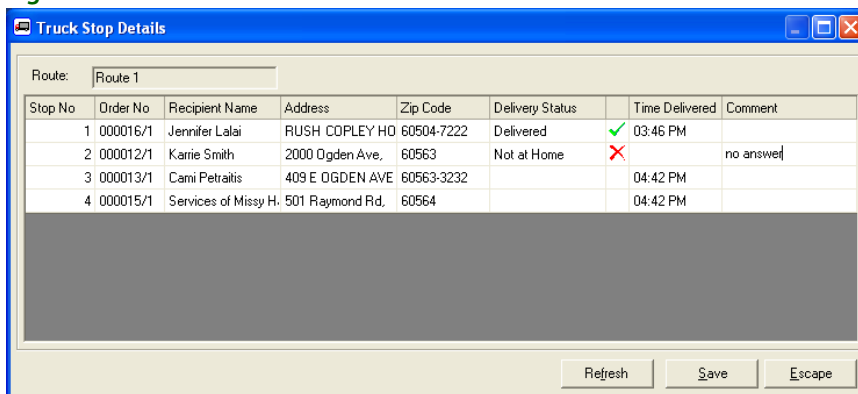
Figure 14-30: Truck Return: Time Delivered



Highlight the hour/minutes, then use the up and down arrows to change the time.

- To add comments to an order, click inside of the **Comment** column and begin typing.

Figure 14-31: Truck Return: Comment



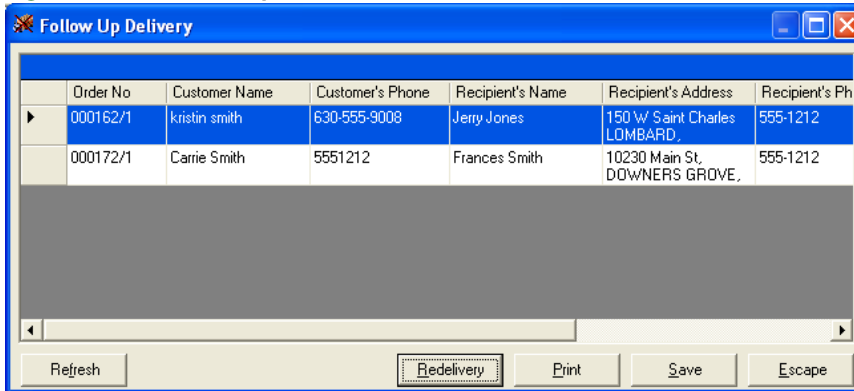
- When you are finished marking deliveries, click **Save**. You are returned to the **Truck Return** screen; click **Escape** in this screen to return to the main screen.

Follow Up Deliveries

If an order was marked Not Delivered during the truck return process, you can later return to the order in Follow Up Deliveries. Here you can mark the order Delivered or Not Delivered with a delivery code or enter comments. Here you can also select new delivery options, for example to redeliver the order today or on another date.

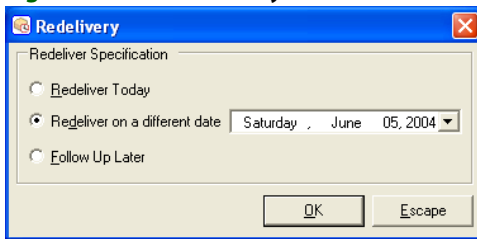
To update the delivery status of an order, click the **Follow Up Deliveries** button in the Main Menu of the Mercury Delivery application, OR from the menu bar click **Route Management**, then click **Follow Up Deliveries**.

Figure 14-32: Follow Up Deliveries



To mark an order Delivered or Not Delivered, select a new delivery status. If you select a Not Delivered delivery status, you are prompted for redelivery information. To select new delivery options for an order, highlight the order and then click the **Redelivery** button. The Redelivery window opens.

Figure 14-33: Redelivery



- » **Redeliver Today** moves the order to the list of today's deliveries where it can be re-routed.
- » **Redeliver on a different date** moves the order to the list of that day's deliveries where it can be re-routed. The delivery date change is posted to order notes.
- » **Follow Up Later** keeps the order in Follow Up Deliveries.

NOTE

If an order is re-routed, the order is still listed in the history of the original delivery route (when printing the original route in the Reprint Route Report or the Delivery Trip Analysis report).

When you are finished, click **Save**. If you marked an order Delivered, it is removed from this window after you click **Save**. Click **Close** when you are finished making changes.

Downloading Free Microsoft MapPoint Construction Updates

Microsoft offers free Highway Construction downloads on the Microsoft Web site. You can check to see if you have the latest highway construction update using your MapPoint software. If you do not have the latest update downloaded, the program asks you if you want to download the latest information.

TASK

To check that you have the latest MapPoint update:

- 1 Open the MapPoint software by clicking the **Windows Start** menu, pointing to **All Programs**, and then clicking **Microsoft MapPoint North America 2004**.
- 2 On the **Route** menu, click **Update Construction Information**.

- 3 If you do not have the latest information, you are asked if you want to download the free update. Click **Yes**.
- 4 When the download completes, you are alerted that it was successful. Click **OK**.

The construction updates only update highway construction information in your area. To receive a full MapPoint update, you will have to keep current with the MapPoint software by purchasing upgrades when they are available from Microsoft.

For more information about the free construction updates or new releases of the MapPoint software, see the MapPoint online help (click **Help** in the menu bar, then click **Microsoft MapPoint Help**) or see the Microsoft Web site at www.microsoft.com.

Wireless Delivery Confirmation

Wireless Delivery Confirmation is an optional add-on feature that you can purchase in addition to the Advanced Mercury Delivery module. It allows your delivery drivers to use wireless phones to update the delivery status of orders (mark orders Delivered or Not Delivered) real-time. With the GPS feature, you can track your drivers' progress throughout the day minute-by-minute, and your drivers can receive live turn-by-turn driving directions.

For pricing information, please call Mercury Technology Sales at 1-800-767-3222.

Setting Up Wireless Delivery Confirmation

When setting up wireless delivery confirmation, you need to perform the following steps:

- » [Step 1: Set Up Delivery Codes](#)
- » [Step 2: Collect the Login Names of Your "Wireless" Employees](#)
- » [Step 3: Confirm the License Key is Valid](#)
- » [Step 4: Set Up Remote Delivery in Mercury Administration \(Support Assisted\)](#)
- » [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#)
- » [Step 6: Set Up Your Phones on the Gearworks Web Site \(Support Assisted\)](#)
- » [Step 7: Activate Your Phones \(Support Assisted\)](#)

Step 1: Set Up Delivery Codes

Delivery codes flag an order as Delivered/Not Delivered. For example, you might set up delivery codes such as Delivered (Delivered), Left on Front Porch (Delivered), Not at Home (Not Delivered), Discharged from Hospital (Not Delivered), etc.

Your delivery drivers have these options listed on their phones so that they can mark orders Delivered/Not Delivered while they are on route. The information is then downloaded to FTD Mercury and update the delivery status of the orders.

You **MUST** at least set up the following five delivery codes. If you do not set up these exact delivery codes, Wireless Delivery Confirmation may not function:

- » DELIVERED
- » LEFT WITH NEIGHBOR
- » LEFT AT FRONT DOOR
- » IN ICU
- » REFUSED

For instructions on setting up delivery codes, see [Delivery Code Screen](#) on page 24–40.

Step 2: Collect the Login Names of Your “Wireless” Employees

Next, decide which employees will be using wireless phones for delivery confirmation. In step 5 you will specify on the Gearworks Web site the FTD Mercury login names of the employees that will be using the wireless phones (the Mercury Technology Assistance Center will help you with this step). Therefore in this step you should write down all of the login names of your “wireless” employees (or if the employees are not created or do not have login names, please create them now or assign login names as necessary. See [Employees Screen](#) on page 24–51).

Note that employees can share phones. For example, if you have five wireless employees and you only have two phones, you should set up five employee accounts.

For each wireless employee, look up the employee’s detail information, either through an Employee Search or in the Mercury Administration program.

Figure 14-34: Employee Detail

Name: <input type="text" value="Steve Smith"/>		Employee ID: <input type="text" value="12"/>	
Address Information <input type="text" value="Home"/> <input type="text" value="3121 Main Street
DOWNERS GROVE, IL 60515"/> <input checked="" type="checkbox"/> Primary Address		<input checked="" type="checkbox"/> Allow this Employee Online Login Name: <input type="text" value="steve"/> Language: <input type="text" value="English"/>	
Phone Information <input type="text" value="Home"/> <input type="text" value="630-555-1212"/> <input type="checkbox"/> Primary Phone		Password: <input type="text" value="*****"/> Confirm: <input type="text" value="*****"/>	
<input checked="" type="checkbox"/> Active Status Social Security No: <input type="text" value="123-45-6789"/> Employee Type: <input type="text" value="Full Time"/> Job Category: <input type="text" value="Truck Driver"/>		Notes <div style="border: 1px solid gray; height: 100px;"></div>	
<input type="button" value="Apply"/>		<input type="button" value="Terminate..."/>	
<input type="button" value="Undo"/>			

Write down the login name in the Login Name field for each wireless employee. For example, the login name for the employee above is “steve.” On the Gearworks Web site you will have to type the login name of each wireless employee exactly as it is displayed in this screen.

Step 3: Confirm the License Key is Valid

After you purchase the Wireless Delivery Confirmation feature (with or without GPS), the Mercury Technology Assistance Center sends you a General message that enables the features on your system. Before you begin setting up Wireless Delivery Confirmation, make sure that the General message has turned on the features for you.

To check that the module(s) have been enabled, in Mercury Administration go to the License option and make sure that **Wireless Delivery Confirmation** and/or **GPS** (if you purchased GPS) reads **Valid**. For more information, see [License Screen](#) on page 24–55.

Step 4: Set Up Remote Delivery in Mercury Administration (Support Assisted)

The remaining steps take place while you are on the phone with the Mercury Technology Assistance Center. The Mercury Technology Assistance Center representative will follow up with you to help you set up and start using the wireless phones. The Mercury Technology Assistance Center can be reached at 1-888-309-2244.

The fourth step is to work with the Mercury Technology Assistance Center to complete the remote delivery information in the Mercury Administration program. The Mercury Technology Assistance Center will give you your account information and show you how to set up the information in the Remote Delivery option in Mercury Administration.

Make sure that you write down your “admin” and “webservice” user account names, passwords, and your company number when the representative gives them to you. In step 5 you will have to log into the Gearworks Web site using this information.

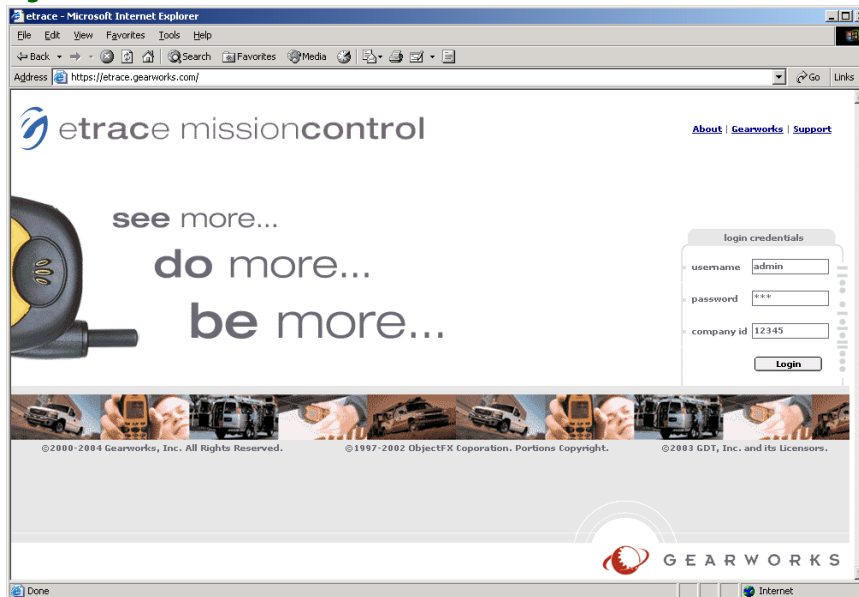
Step 5: Create Wireless Employees on the Gearworks Web Site (Support Assisted)

Now you will go to the Gearworks Web site and set up your wireless employees. You will be setting up one account for each employee. A Mercury Technology Assistance Center Representative will walk you through this process.

You will need the following before you begin:

- » The password for the “admin” account provided by the Mercury Technology Assistance Center
 - » Your company ID number provided by the Mercury Technology Assistance Center
 - » The FTD Mercury login names of the employees that will be using the wireless phones
- 1 On your Web browser, type `https://etrace.gearworks.com` and press **Enter**. This takes you to the Gearworks Web site.

Figure 14-35: Gearworks Web Site



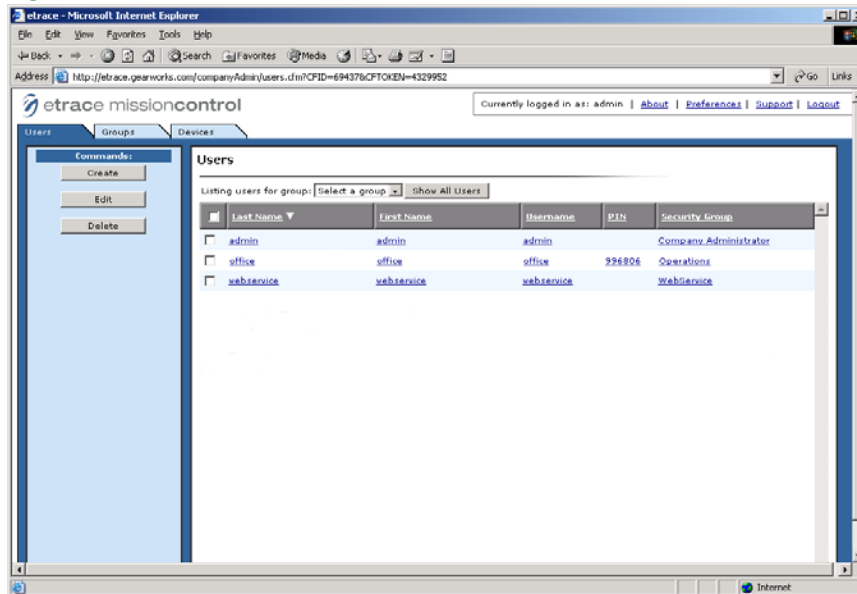
- 2 In the **username** field, type `admin`.
- 3 In the **password** field, type the admin password that was given to you by the Mercury Technology Assistance Center.

- 4 In the **company id** field, type the company ID number that was given to you by the Mercury Technology Assistance Center.
- 5 Click **Login**. This takes you to the main admin screen, which displays a current list of wireless employees. At this time, three employees are set up for you: **Admin**, **Webservice**, and **Office**.

Caution

These user accounts should never be deleted. If they are deleted, Wireless Delivery Confirmation will not function.

Figure 14-36: Gearworks Web Site: Users Tab



- 6 Click **Create** to create the first wireless employee. The **Create User** window opens.

Figure 14-37: Gearworks Web Site: Create User

The screenshot shows the 'Create User' form in the Gearworks web application. The form is titled 'Create User' and contains several input fields and dropdown menus. The fields are: First Name (Steve), Middle Name (empty), Last Name (Smith), Preferred Name (empty), Group (FTD), Security Group (Mobile Worker), Timezone (CDT), Username (*) (steve), Password (*), and Confirm Password (*). Below these fields is a 'Contact Information' section with fields for Street, Phone Number, Apt/Suite, Mobile Number, City, Fax Number, State/Province, Email, Postal Code, and Country (US). At the bottom, there is a legend for required fields (*) and two buttons: 'Create' and 'Cancel'.

- 7 Complete the following fields in this window.

NOTE

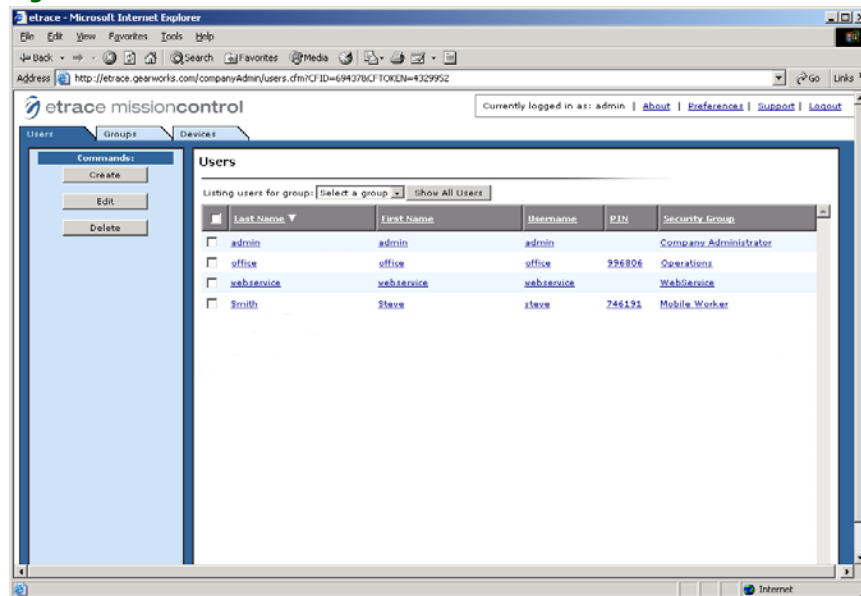
Note: All required fields are marked with an asterisk. In addition to asterisk fields, you must either indicate a Last Name or a Preferred Name.

- » **First Name** - type the employee's first name.
- » **Last Name** - type the employee's last name.
- » **Group** - select FTD.
- » **Security Group** - select Mobile Worker.
- » **Timezone** - select your time zone.
- » **Username** - type the employee's FTD Mercury login name exactly as it appears in the Employee Detail window in FTD Mercury. This field is case sensitive.
- » **Password** - type a password for the employee.
- » **Confirm Password** - type the password again to confirm.

You can leave the rest of the information blank (it does not display anywhere except for this screen).

- 8 Click **Create** to add the employee. The employee's name now displays in the list of users, and a PIN number is assigned to the employee (see the PIN column).

Figure 14-38: Gearworks Web Site: Add New User



Write down the employee's PIN number and give it to the employee to memorize. Each time the employee logs onto the wireless phone, he or she is required to enter this PIN number.

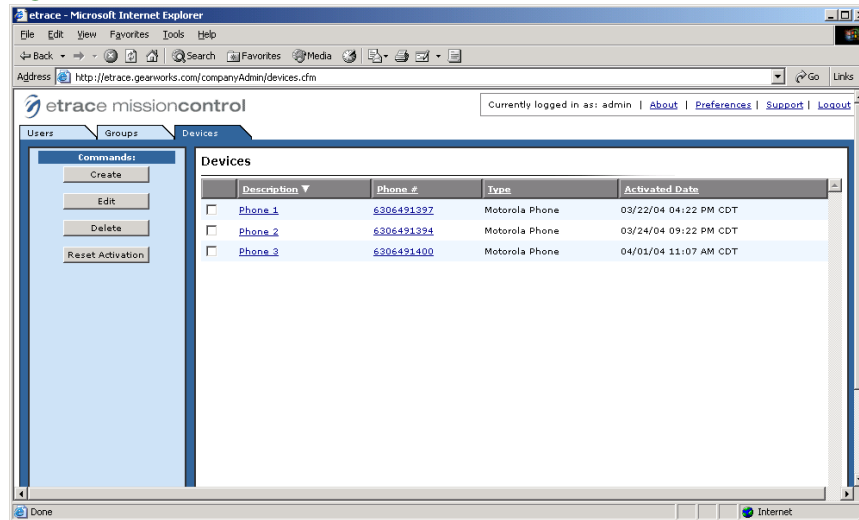
- 9 Repeat steps 6-8 to add additional wireless employees.

Step 6: Set Up Your Phones on the Gearworks Web Site (Support Assisted)

Next an MTAC Representative will walk you through setting up the Motorola wireless phones in the Gearworks Web site.

TASK To set up your phones on the Gearworks Web site:

- 1 On the Gearworks Web site, click the **Devices** tab. This screen lists any phones that are already set up (if any).

Figure 14-39: Gearworks Web Site: Devices Tab

- 2 To add a phone, click **Create**. The **Create Device** window opens.

Figure 14-40: Gearworks Web Site: Create Device

Create Device
 Device type: Motorola Phone
 Device status: Active
 Description: Phone 4
 Serial Number:
 Phone Number: 6306491904
 Save Save and New Cancel

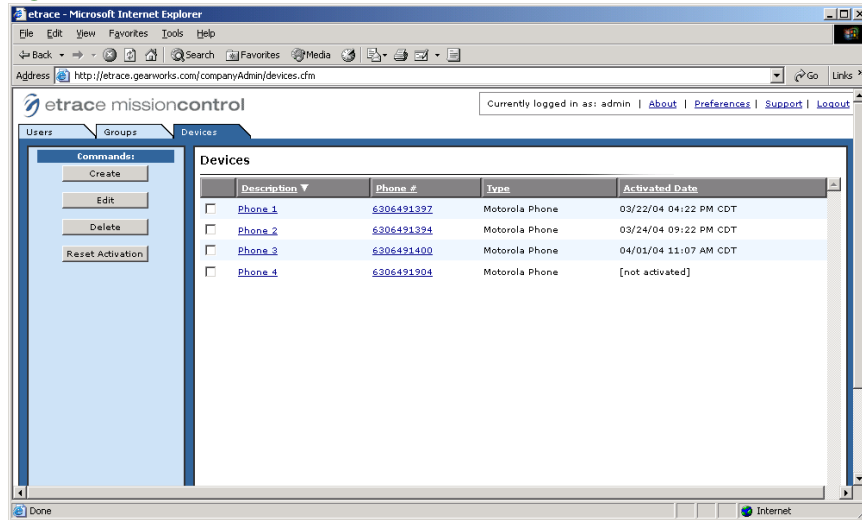
- 3 Complete this screen, specifying the following information:

NOTE

Note: You do not have to complete the Serial Number field.

- » **Device type** - select Motorola Phone to set up a regular wireless delivery confirmation phone, or select Smart Talk Device to set up IVR.
 - » **Device status** - select Active.
 - » **Description** - type a description for the phone that will help identify it.
 - » **Phone Number** - type the phone number of the phone.
- 4 Click **Save** to save the phone information, or if you have multiple phones, click **Save and New**. This saves the information you just entered and clears the fields in the window so that you can enter another phone. When you are finished entering your phones, click **Save**. The phone is displayed in the device list, with the Activated Date of “not activated” (you will activate the phone later).

Figure 14-41: Gearworks Web Site: Add New Device



You are now finished with the setups in the Gearworks Web site. Click logout in the upper right hand corner of the screen to log off of the site. Next you will activate the phones.

Step 7: Activate Your Phones (Support Assisted)

Next you will activate Wireless Delivery Confirmation on your phone(s). An MTAC Representative will walk you through this process.

TASK To activate your phones:

- 1 Turn on the phone by pressing and holding the power button at the top of the phone.
- 2 When you reach the Nextel main screen, press the menu button.

NOTE

You may be prompted to update the Web browser features on your phone. If so, follow the prompts to update the Web browser before proceeding.

- 3 Highlight **Java Apps** and then press **Select**.
- 4 In the **Java Apps** menu, highlight **etrace** and the press **Install**. The program then installs.
- 5 Press **Done** when the install is complete.
- 6 Highlight **etrace** and then press **Run**.
- 7 At "Please enter phone number" type the phone number of the phone and then press **OK**. The phone takes a few seconds to activate.
- 8 When the activation is complete, you are prompted for a PIN number. Employees were assigned PIN numbers in step 4. (Note that PIN numbers are not specific to any phone. They are specific to each employee.) Type an employee's PIN number and press **Login**.
- 9 At the message "Etrace Requests Location Reload?" press **Grant**.
- 10 At "Always Grant Request?" press **Yes**.
- 11 At "Press RED PHONE..." press **Resume**.
- 12 At the warning message, press **Accept**.

Congratulations! Your wireless phones and employees are now set up and you are ready to use Wireless Delivery Confirmation. Before downloading orders to the phone, you may want to familiarize yourself with the phone and read through the Nextel user's guide to learn navigation methods.

Continue to [Using Wireless Delivery Confirmation](#) on page 14-39 to learn how to download orders to the phone, and how to mark orders Delivered or Not Delivered using the phone.

Using Wireless Delivery Confirmation

When you use wireless delivery confirmation, you can perform the following tasks:

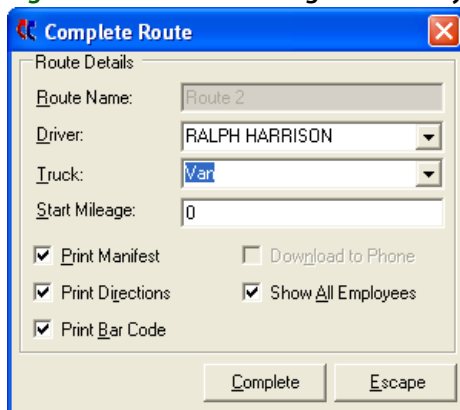
- » Downloading the Route Information to the Phone
- » Receiving Orders on the Phone/Marking Orders Delivered
- » Completing a Route
- » Updating Your etrace Phone Software

Downloading the Route Information to the Phone

To use Wireless Delivery Confirmation, you should create and save routes as normal. However you must make sure that you do the following (see the example below):

- » After you click **Complete** in the **Create Routes** screen to complete the route, the **Complete Route** window pops up. Make sure **Download to Phone** is checked in this window (the **Download to Phone** option is active only for employees that you set up as wireless employees on the Gearworks Web site).
- » Make sure that you select the correct driver name in the **Complete Route** window because the route information is downloaded to that driver's phone.

Figure 14-42: Downloading the Delivery Route to the Phone



Click **Complete** to complete the route and to download the information to the driver's phone. If the driver is logged on to the phone, he or she will receive a message that "You have X new jobs" where X - 1 is the number of orders to be delivered (for example, if the phone states that you have 10 new jobs, you actually have 9 new jobs. The Route Complete option is counted as a job number). The phone will also beep to warn the driver.

NOTE

The delivery driver must complete a delivery route before you can download him a second delivery route. The driver must mark that route complete on the phone before he or she can receive another route. If you try to download a route to a driver that has not yet marked a route complete on the phone, you receive the message "Driver <name> has not completed a previous route from the phone. A new route will not appear on the phone until the driver completes the previous route from the phone."

Receiving Orders on the Phone/Marking Orders Delivered

Before a delivery driver can receive orders, he or she must be logged into the phone.

TASK

To log in to the phone:

- 1 Press the menu button on the wireless phone.
- 2 Highlight **Java Apps** and then press **Select**.
- 3 Highlight **etrace** and then press **Run**.

- 4 At "Please enter PIN," type your employee PIN number (that was assigned in step 4) and then press **Login**.
- 5 At the warning message, press **Accept**.

If you have jobs waiting for you, your phone will beep and you will receive the message "You have X new jobs" where X - 1 is the number of deliveries waiting for you (one job is the "route complete" job, which marks the delivery route complete). Press OK to accept this message. Note that it will take a minute or two after logging in for your phone to receive the orders.

TASK To view jobs or mark jobs **Delivered/Not Delivered (on the phone):**

- 1 **Highlight Jobs** and then press **Select**. The list of orders to be delivered displays. (Note that **Route Complete** is listed at the end of the job list. This will always be listed as your last job. For example, if you received 10 jobs, there will be 9 jobs to deliver, then the 10th job will be the **Route Complete** option.)

- 2 Highlight the first job, then press **Select**.

To mark an order **Delivered/Not Delivered**:

- a. Highlight **Status** and then press **Select**. On the next screen, the list of delivery codes that you set up in Mercury Administration displays. See [Delivery Code Screen](#) on page 24-40 to learn how to set up delivery codes.
- b. Highlight a delivery code in the list and then press **Select**. The order then displays in the jobs list with a check mark next to it.

If the delivery code is a **Delivered** code, it marks the order **Delivered**. If the delivery code is a **Not Delivered** delivery code, it marks the order **Not Delivered**. **Not Delivered** orders can be rescheduled in the **Follow Up Deliveries** screen in the **Mercury Delivery** application (see [Follow Up Deliveries](#) on page 14-30).

To view the details of a job (recipient and product information, highlight **Details** and then press **Select**. When you are finished viewing details, press **Back** to return to the jobs list.

To receive driving instructions (GPS users only), highlight the delivery address (option 3) and then press **Select**. It will take the program a few seconds to find your current location and then display the driving instructions.

Completing a Route

You must mark your route complete when you are finished with your deliveries. If you do not mark your route complete, the orders will not be removed from the phone, and your route will still be "in progress" in the Mercury Delivery application. You will not be allowed to receive another route until the first route is complete.

TASK To complete a route:

- 1 In your jobs list, highlight **Route Complete** and then press **Select**.
- 2 Highlight **Status** and then press **Select**.
- 3 Highlight **Complete** and then press **Select**.
- 4 Highlight **Confirm Complete** and then press **Select**.

Updating Your etrace Phone Software

Updates will occasionally be available for you to download from your wireless phones. You are notified on your phone when an update is available. You must first uninstall the existing software, and then install the update. You will have to perform this procedure on each of your delivery confirmation wireless phones.

TASK To uninstall the earlier version of etrace software and update to the new version:

- 1 Press the **menu** button on the phone.
- 2 Highlight the **Java Apps** menu and press **OK**.
- 3 Highlight **etrace** and press the **menu** button on the phone.
- 4 Select **Deinstall** and press **OK**.
- 5 At the **Are You Sure** confirmation, press **Yes**.
- 6 If you receive a message that **Power loss may destroy additional apps**, press **OK**.
- 7 Once there are green check marks next to the steps, press **Done**.
- 8 In the **Java Apps** menu, highlight **Download Apps** and press **OK**.
- 9 Highlight **Subscriptions** and then press **Select**.
- 10 Move down on the list until you see **Gearworks etrace**, highlight it, and press **Select**.
- 11 Press **Get It**.
- 12 If you receive a warning message, press **Get It**. If you receive a memory error, press **Main**.
- 13 Press **Exit** to exit the **Download Apps** menu.
- 14 In the **Java Apps** menu, highlight **etrace** and then press **OK**. The program then installs.
- 15 Press **Done** when the install is complete.
- 16 Highlight **etrace** and then press **OK**.

Your phone software is now upgraded. Follow any additional prompts if required. Enter your PIN number and then press the Login button to log in.

GPS Upgrade

If you use Wireless Delivery Confirmation, you have the option of upgrading to a phone that has a Global Positioning System (GPS) receiver. A GPS receiver is a device that can pinpoint your exact location using the Global Positioning System – a worldwide radio-navigation system formed from 24 satellites. GPS uses these satellites as reference points to calculate your position very accurately (within a matter of feet).

GPS is a very useful tool for businesses with delivery operations, like your shop. You can monitor your delivery drivers' progress and location while they are on route. GPS gives you the following features:

- » While your drivers are on route, you can view their exact location (see [Viewing Routing Progress](#) on page 14–24).
- » You can view the exact location of all of the phones, even if a route is NOT downloaded to the phone (if a driver has a phone with him or her that does not have routes downloaded to it, you can still track the location of the phone). See [Tracking Phone Location \(With No Orders Downloaded\)](#) on page 14–41" below.
- » Your drivers can use their wireless phones to get turn-by-turn driving directions from their current location anytime while they are on route.

For GPS pricing information, please call Mercury Technology Sales at 1-800-767-3222.

Tracking Phone Location (With No Orders Downloaded)

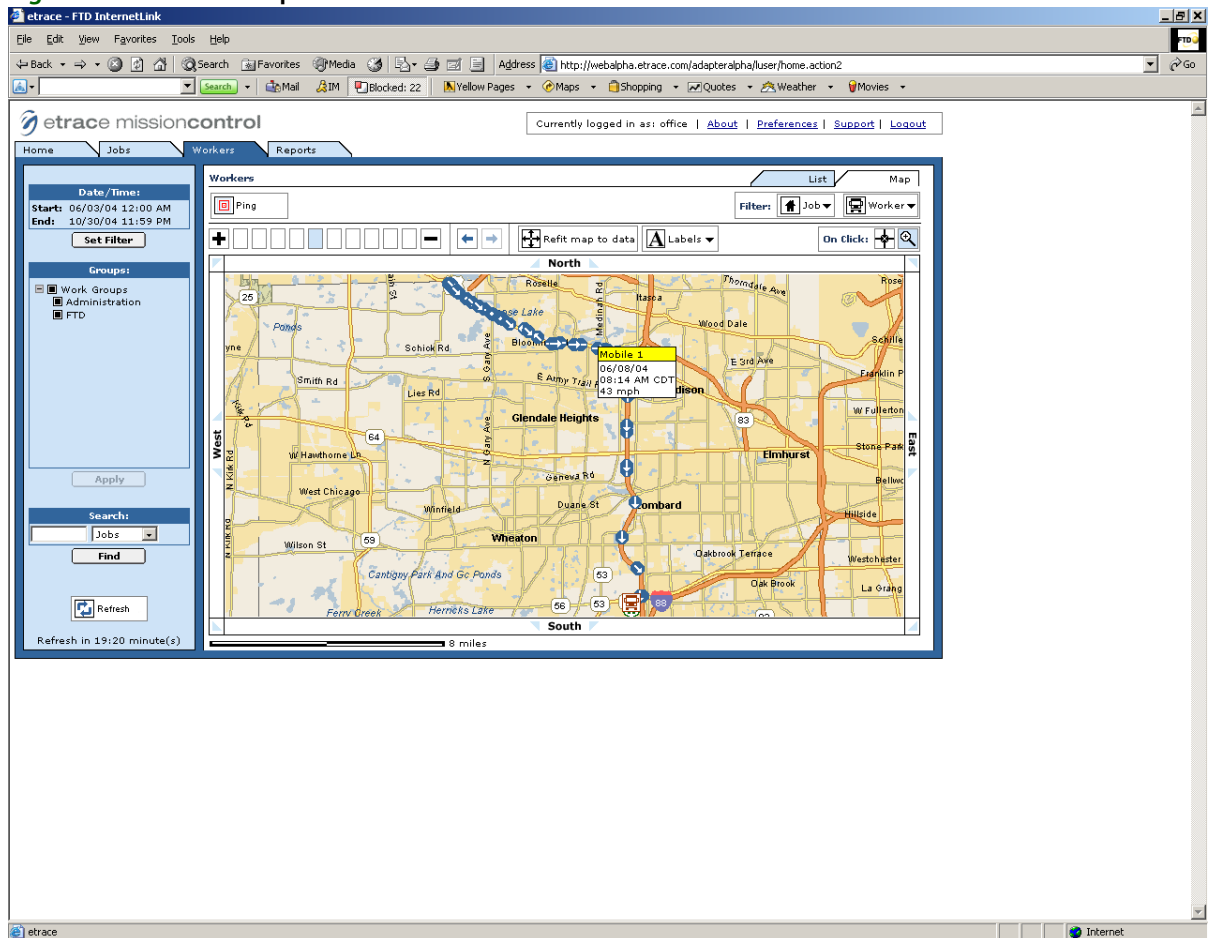
If you have GPS, you can track the location of your wireless delivery phones when orders are NOT downloaded to the phone. If no orders are downloaded to the phone, you must track the phones on the Gearworks Web site. You cannot view this information from the View Routing Progress screen.

TASK To track phones with no orders downloaded:

- 1 In your Web browser, type `https://etrace.gearworks.com` and press **ENTER**. This takes you to the Gearworks Web site.
- 2 On the main Gearworks Web page:
 - a. In the **username** field, type `office`.
 - b. In the **password** field, type the office password issued to you by FTD.
 - c. In the **company id** field, type the company ID issued to you by FTD.
 - d. Click **Login**.
- 3 Click the **Workers** tab.
- 4 Click the **Map** tab.

The truck icon shows the location of your phones. If you have any active routes (routes that have not been marked complete), the path of those routes displays on the screen.

Figure 14-43: Phone Map



IVR

If you have Wireless Delivery Confirmation, you can use IVR (Integrated Voice Response). IVR allows you to mark orders Delivered or Not Delivered using ANY cellular phone that has caller ID enabled. First you must set up a cellular phone as a SmartTalk IVR device on the Gearworks Web site. Then using that phone, call a phone number to activate the IVR account. Then using your employee PIN number (generated on the Gearworks Web site), you can call from ANY phone (with caller ID) to log in and retrieve orders.

NOTE Make sure that you have enough “anytime” minutes on the cell packages of the phones that you are using for IVR. The phone number that you will be calling is 651-209-0495, which is most likely a long distance number for your shop. Make sure that your phone packages accommodate for these phone calls.

Setting Up IVR

Setting up IVR phones is very similar to setting up your wireless delivery confirmation phones. IVR allows you to use ANY wireless phone with caller ID. However, you first must set up a particular phone on the Gearworks Web site to activate IVR, then you can use any phone you wish to log in and mark orders Delivered or Not Delivered.

Complete following steps outlined in the [Setting Up Wireless Delivery Confirmation](#) on page 14–32. Some of these steps require the assistance of the Mercury Technology Assistance Center. Call the MTAC at 1-888-309-2244 for assistance with these steps.

- 1 Complete [Step 1: Set Up Delivery Codes](#) on page 14–32.
- 2 Complete [Step 2: Collect the Login Names of Your “Wireless” Employees](#) on page 14–33.
- 3 Complete [Step 3: Confirm the License Key is Valid](#) on page 14–33.
- 4 Complete [Step 4: Set Up Remote Delivery in Mercury Administration \(Support Assisted\)](#) on page 14–34.
- 5 Complete [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#) on page 14–34.
- 6 Complete [Step 6: Set Up Your Phones on the Gearworks Web Site \(Support Assisted\)](#) on page 14–36, using the Device Type of SmartTalk instead of Motorola Phone.

Continue with [Activating IVR \(Support Assisted\)](#) on page 14–43, where you will activate the phone that you set up in step 6.

Activating IVR (Support Assisted)

After setting up your employees and devices as described in “Setting Up IVR” above, IVR is set up but it is not activated. Next you must activate IVR from that phone by calling 651-209-0495.

TASK To activate IVR:

- 1 From the phone that you set up in “Setting Up IVR” above, dial 651-209-0495.
- 2 You are prompted for a PIN number. Type your employee PIN number that was generated in [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#) on page 14–34.

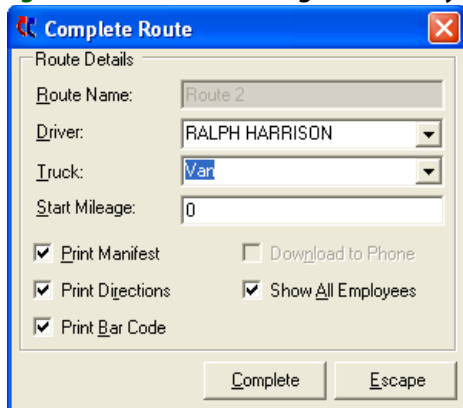
Your IVR account is now activated. Now your employees can use any phone that has caller ID to dial the IVR number (651-209-0495), log in with their employee PIN numbers, and mark orders Delivered or Not Delivered.

Completing Delivery Routes in Mercury Delivery for IVR

To save a route so that it can be retrieved using IVR, you should create and complete routes as normal. However you must make sure that you do the following (see the example below):

- » After you click **Complete** in the **Create Routes** screen to complete the route, the **Complete Route** window pops up. Make sure **Download to Phone** is checked in this window (the **Download to Phone** option will be active only for employees that you set up as wireless employees on the Gearworks Web site).
- » Make sure that you select the correct driver name in the **Complete Route** window because the route information will be available for that employee next time he or she calls the IVR phone number to retrieve orders.

Figure 14-44: Downloading the Delivery Route to the Phone



Calling In to Receive Orders/Marking Orders Delivered

When a driver is ready to mark an order Delivered or Not Delivered, he or she should follow the procedure below.

TASK To call in to mark an order as delivered or not delivered:

- 1 From any cellular phone with caller ID, dial **651-209-0495**.
- 2 When prompted for a PIN number, type your employee PIN number (which was generated in [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#) on page 14-34).
- 3 After you type the PIN number, your orders are listed numerically. Press the number of the order that you want mark Delivered/Not Delivered.
- 4 Delivery codes are then listed numerically. Type the number of the delivery code that you want to assign to the order.
- 5 To mark another order, press ** (press the star button twice). This returns you to the Main Menu so that you can perform another action.
- 6 When you are finished marking orders, hang up the phone.

Once you key in a delivery code for the order, the order is removed from the list of orders. The only way to change the status of the order is to manually change it at the shop upon return.

Completing a Route from the Phone

You must mark your route complete when you are finished with your deliveries. If you do not mark your route complete, the orders will not be removed from the phone, and your route will still be “in progress” in the Mercury Delivery application.

NOTE You can mark a route complete without marking each order complete, however this will not take orders off of the route or the phone. You will have to go to the Follow Up Deliveries option in Mercury Delivery to follow up on these orders.

TASK To complete a route from the phone:

- 1 From any cellular phone with caller ID, call **651-209-0495**.
- 2 When prompted for a PIN number, type your employee PIN number (which was generated in [Step 5: Create Wireless Employees on the Gearworks Web Site \(Support Assisted\)](#) on page 14-34).
- 3 Follow the prompts to mark the route complete, then to confirm complete.
- 4 Hang up the phone when you are instructed to do so.

Using Garmin GPS Devices with Mercury Delivery

FTD Mercury has integrated GPS upload functionality for the Garmin StreetPilot c330, Garmin StreetPilot c340, and Garmin Nuvi 350 devices through Mercury Delivery. These three devices are the only Garmin GPS devices supported in FTD Mercury.

IMPORTANT You must be a licensed Advanced Delivery user to use these devices. Additionally, you must call FTD Technology Sales to activate this feature (1-800-767-3222).

The basic process you should use for each delivery route is:

- 1 Set the GPS device home (or verify that it is set to the correct home location). You will need this home location so you can get directions from the last stop on your route to your final destination (usually your shop).
- 2 Ensure the previous routes are removed from the GPS device, so you avoid accidentally driving the wrong route.
- 3 Create your delivery routes as normal in Mercury Delivery.
- 4 Upload the delivery routes to the GPS device. You *must* upload from the same computer where you created the delivery routes. Delivery routes are uploaded by driver, and the GPS device can only handle routes assigned to a single driver at a time.
- 5 Follow the GPS device directions to each of your destinations.
- 6 Follow the GPS device directions to your home location.
- 7 Perform a Truck Return to mark deliveries as delivered/not delivered. If the entire route has been delivered, mark the route with the status of Delivered so the route will not be uploaded again to the GPS device.
- 8 Remove the previous routes from the GPS device.

IMPORTANT The Garmin StreetPilot c330, StreetPilot c340, and Nuvi GPS devices include a printed Setup and Go! guide. You can download more information about the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 on Garmin's Web site at www.garmin.com.

Setting Your Home Location on the GPS Device

Prior to using the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 GPS device for turn-by-turn directions, you should set your home location—which should be either your shop location or the location where the driver returns to complete the route and mark orders as delivered.

TASK To set your home location:

- 1 On the **Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 Main Menu**, press **Where to?**
- 2 Press **My Locations**.
- 3 Press **Set Home**.
- 4 If a home location already exists, press **Yes, enter my Address**.
- 5 Select the state where your shop is located. If your state is not displayed, press **Spell State**, type the name of your state. When the GPS device presents the **Select State** menu, select your state.
- 6 Press **Spell City**. Type the name of your city. When the GPS device presents the **Select City** menu, select your city.
- 7 Enter the street address (number) for your shop. Press **Done**.
- 8 Enter the street name. When the GPS device presents the **Select Street** menu, select your street name.
- 9 When the full address of your shop appears, click **Save** to save it as your home address.

Removing Previous Routes from the GPS Device

When you return to the shop to mark orders as delivered in Mercury Delivery, you need to remove the existing route from the GPS device so it does not conflict with future routes and destinations. You should also remove the previous delivery route before you upload a new route (just in case someone did not remove it following Truck Return).

TASK To remove a previous route from the GPS device:

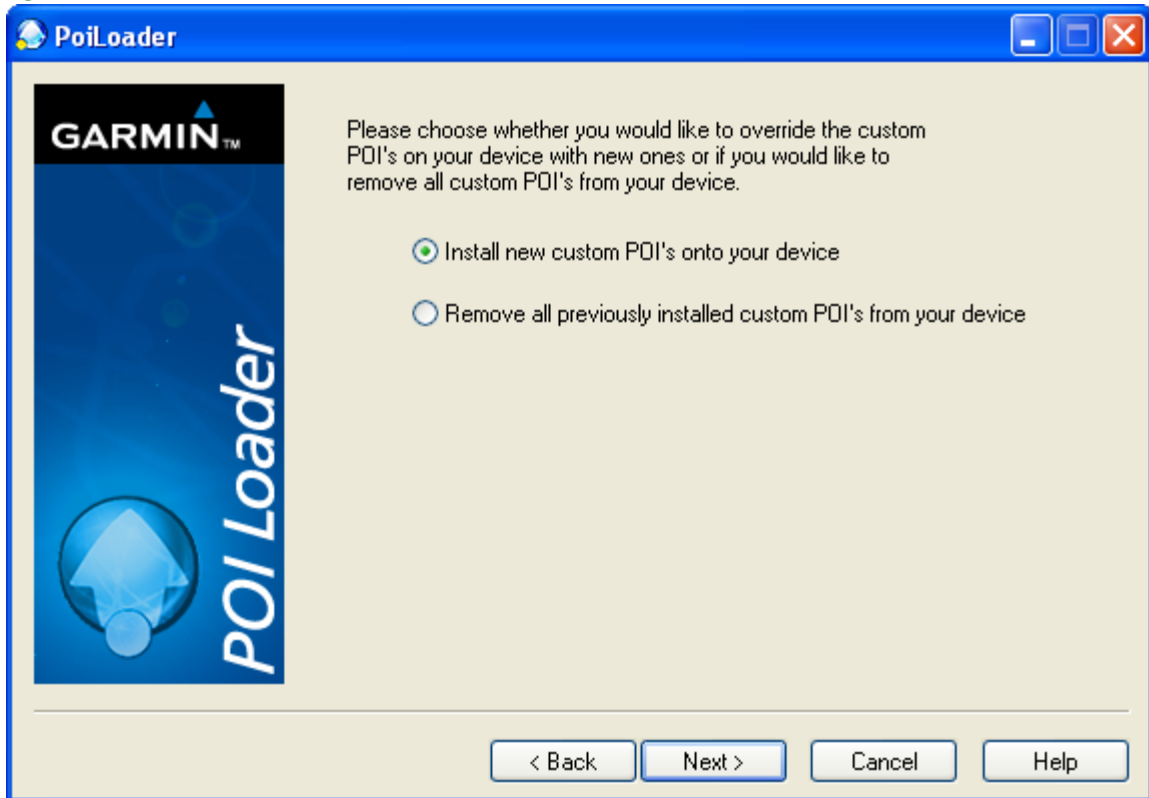
- 1 Plug the GPS device into the USB port on your computer.
- 2 In **Mercury Delivery**, click the **GPS Device** button on the toolbar. The **PoiLoader** window opens.
- 3 On the **Welcome** panel, click **Next**.
- 4 On the **Device Search** panel, if the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 GPS device is not automatically found, click **Find Device**. Once the device has been found, click **Next**.
- 5 Click **Remove all previously installed custom POI's from your device** and click **Next**.
- 6 When a message appears stating To reinstall custom POI's you will need to run POI Loader again. Are you sure you want to proceed? click **Yes**.
- 7 On the **Finish** screen, click **Finish**.

Your Garmin GPS unit will reset after the route has been removed.

Uploading Routes to the GPS Device

Once you create your delivery routes in Mercury Delivery, you can easily upload them to the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 GPS device. This is accomplished using the POI Loader.

Figure 14-45: The Garmin POI Loader.



IMPORTANT The GPS device can only store routes for a single driver at a time. If you attempt to upload routes for a second driver to the same GPS device, routes for the first driver will be removed automatically from the GPS device. Additionally, you must upload from the same computer where you created the delivery routes.

TASK **To upload routes to the GPS device:**

- 1 Create your delivery routes as normal in Mercury Delivery. Ensure you finish by clicking **Complete Routes**.
- 2 Plug the GPS device into your computer's USB port.
- 3 Click the **GPS Device** button on the toolbar. The **PoiLoader** window opens.
- 4 On the **Welcome** panel, click **Next**.
- 5 On the **Device Search** panel, if the Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 GPS device is not automatically found, click **Find Device**. Once the device has been found, click **Next**.
- 6 Select **Install new custom POI's onto your device** and click **Next**.
- 7 On the **Data Selection** panel:
 - a. Click Browse and browse to C: \Wi ngs\GPSdata and select the folder with the name of the driver for whom you want to upload routes. Click **OK**.
 - b. Ensure your units are set appropriately.
 - c. Select **Express (Recommended)** as the mode.
 - d. Click **Next**.
- 8 On the **Finish** screen click **Finish**.

Your Garmin GPS unit will reset after it has loaded.

Accessing Routes on the GPS Device

Once you have uploaded routes to the GPS device, you can access them to show you where each stop is on each route. If you have only uploaded a single route, the Custom POIs menu will display each stop as an individual Point of Interest (POI). However, if you have uploaded multiple routes, the Custom POIs menu displays each route as its own point of interest. When you upload multiple routes, each route is named in the format Day_Date_RouteName. For example, a route in Mercury Delivery called Northside for Tuesday, July 24th, 2007 will be named Tue_July_24_2007_Northside.

NOTE When only one route is uploaded, the name of the route is not displayed on the Garmin GPS device.

TASK **To access a route on the GPS device:**

- 1 On the **Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 Main Menu**, press **Where to?**
- 2 Press **My Locations**.
- 3 Press **Custom POIs**.
- 4 If multiple routes have been uploaded, press the route you want to access.
- 5 From the list, press the destination where you want to go. Each destination is preceded by a number, which corresponds to the stop number on the route.
- 6 Press **Show Map**.
- 7 Press **Go!**
- 8 Follow the directions to the destination.

Repeat this for each subsequent stop on the route. When you are finished, you can go back to your home location to perform a Truck Return and mark orders as delivered/not delivered.

Getting Directions to Your Home Location

At the end of a route, you need to know how to get back to your shop (or truck return location). You have already set the home location, so getting directions from your present location to your final destination is easy.

TASK To get directions from your current location to your home location:

- 1 On the **Garmin StreetPilot c330, StreetPilot c340, or Nuvi 350 Main Menu**, press **Where to?**
- 2 Press **My Locations**.
- 3 Press **Go Home**.

The GPS device provides you directions from your current location to your home location.

Returning to Your Shop After a Delivery Route

When you return to your shop after you have finished your route, perform your Truck Return as normal. Once an entire route has been marked as Delivered in Truck Return, Mercury Delivery automatically deletes the route file from the driver folder on the system. However, the route is not removed from the GPS device until either you upload new routes or explicitly remove previous routes from the GPS device.

TIP When you have finished, a best practice is to remove the previous routes from the GPS device.

Delivery Reports

You can print several reports from the Mercury Delivery application. These reports allow you to see which orders have been routed, not routed, delivered, and not delivered. You can also print the order statistics per delivery zone, and analyze your delivery trips by delivery driver.

You can print the following reports:

- » [Delivery Zone Report](#)
- » [Delivery Trip Analysis Report](#)
- » [Delivery Trip Analysis Report](#)
- » [Delivery Problem Report](#)

Delivery Zone Report

The Delivery Zone Report prints the number and total dollar amount of deliveries per delivery zone for a given date range.

Figure 14-46: Sample Delivery Zone Report

DELIVERY ZONE REPORT		
BY DELIVERY DATE		
FROM 11/04/04 TO 11/04/04		
STORE: All Stores		
ZONE	NUMBER OF ORDERS	TOTAL ZONE AMOUNT
DOWNTOWN NAPERVILLE	6	\$305.55
EAST AURORA	2	\$112.24
JAMES FUNERAL SERVICE	1	\$155.07
NAPERVILLE EAST	7	\$417.18
NAPERVILLE WEST	2	\$98.60
RUSH COPLEY HOSPITAL	2	\$134.41
Totals:	20	\$1,223.05

Generating the Delivery Zone Report

TASK To generate the Delivery Zone report:

- 1 From the Mercury Delivery application menu bar, click **Reports**, then click **Delivery Zone Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**. The Delivery Zone Report window opens.

Figure 14-47: Delivery Zone Report

- 3 In the **Select Store** field, click the arrow and select the store's data that you want to print. To use the data from all stores, select **All Stores** from the list.
- 4 Select start and end dates in the **Start Date** and **End Date** fields. In each field, click the arrow to display a calendar, then click on a date.
- 5 Click **Finish**.
- 6 From the Excel menu bar, click **File**, then click **Print** to print the report.
- 7 Click **File**, then click **Save** to save the report.

Delivery Report

There are four types of Delivery Reports:

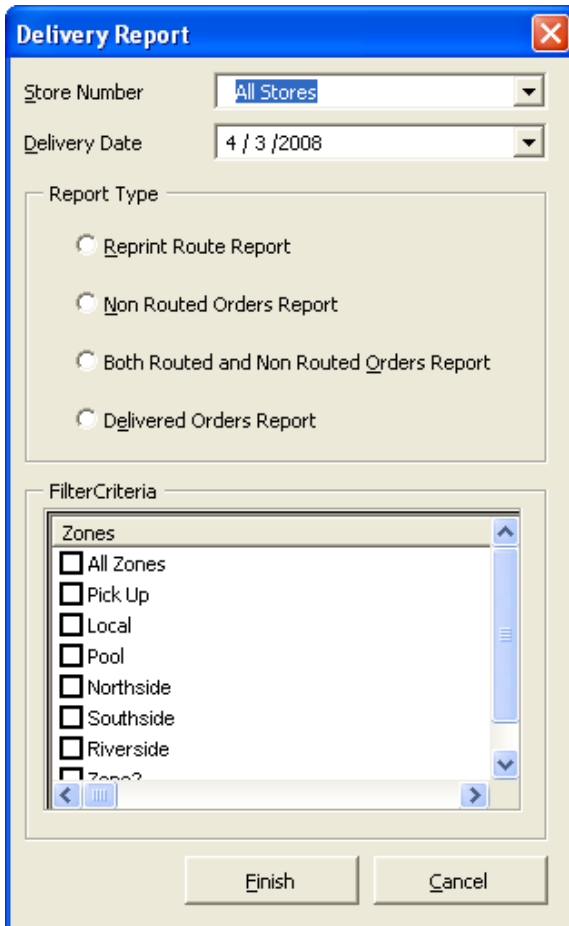
Table 14-6: Delivery Report Types

Delivery Report Type	Description
Reprint Route Report	Prints order, delivery, recipient, and product information for saved and completed routes.
Non Routed Orders Report	Prints all orders that have not been routed for a particular delivery date.
Both Routed and Non Routed Orders Report	Prints routed and non routed orders for a particular delivery date.
Delivered Orders Report	Prints all orders that have been delivered on a particular delivery date.

Delivery Report Window

Delivery reports are generated from the Delivery Report window. The Delivery Report window enables you to select the store, delivery date, and type of delivery report. You can also select filter criteria to limit the information in the report to specific delivery zone(s).

Figure 14-48: Delivery Report Window



Reprint Route Report

The Reprint Route Report prints route information for a saved route (routes that have been SAVED or COMPLETED). It lists each order in the saved route, along with the order's stop number, delivery zone, recipient information, product information, and priority.

NOTE If an order has been re-routed, it can display in multiple delivery routes. When a route is completed, the route history shows all orders in the original route, regardless if any of the orders were re-routed.

Figure 14-49: Sample Delivery Report: Reprint Route Report

STOP	ZONE	ORDER	DELIVER TO	TOTAL PRODUCTS	DELIVERY INSTRUCTIONS
TRUCK DEPART TIME: 10:21 AM TRUCK DRIVER: Kevin TRIP NUMBER: Route 1					
1	Lombard	000023/1	Leslie Thompson 782 Main Street LOMBARD, IL 60148 Tel: 555-1212 ENTRY DATE: 11/09/04 TIME:10:13 AM	1 - Fresh Arrangement TOT PRODS: 1 RECEIVED BY: _____	
2	Butterfield	000024/1	Karen Lange 990 Butterfield Road WHEATON, IL 60515 Tel: 555-3434 ENTRY DATE: 11/09/04 TIME:10:15 AM	1 - The FTD Happiness Bouquet TOT PRODS: 1 RECEIVED BY: _____	Leave on front porch if not home.
3	Lombard	000027/1	Jennifer Dooley 150 W St Charles Road LOMBARD, IL 60148 Tel: 555-5656 ENTRY DATE: 11/09/04 TIME:10:18 AM	1 - The FTD Rose Fest Bouquet TOT PRODS: 1 RECEIVED BY: _____	
4	Lombard	000028/1	Patrick O'Malley 983 Eagle Street LOMBARD, IL 60148 Tel: 555-7887 ENTRY DATE: 11/09/04 TIME:10:18 AM	1 - The FTD Winter Elegance Bouquet TOT PRODS: 1 RECEIVED BY: _____	
TOTALS ZONES: 2 TOTAL ORDERS: 4 TOTAL STOPS: 4					

Generating the Reprint Route Report

NOTE Before printing this report, know the route number that you want to print.

TASK **To generate the Reprint Route report:**

- 1 On the **Reports** menu, click **Delivery Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 3 When the **Delivery Report** window opens, today's date is listed in the **Delivery Date** field. If you want to print a delivery route for a different date, click the arrow and select that date from the calendar.
- 4 In the **Report Type** section, select **Reprint Route Report**.
- 5 In the **Trip Number** field, click the arrow and select the route number that you want to print.
- 6 Click **Finish**. The report generates in Microsoft Excel.

TASK **To print the report from Microsoft Excel:**

On the Excel menu bar, click **File**, then click **Print** to print the report.

TASK **To save the report in Microsoft Excel:**

On the Excel menu bar, click **File**, then click **Save** to save the report.

Non Routed Orders Report

The Non Routed Orders Report prints all orders that have not been routed for a particular delivery date. Orders are sorted by delivery zone.

Figure 14-50: Sample Delivery Report: Non Routed Orders Report

Date: 03/10/04		NON ROUTED ORDERS FOR DELIVERY DATE: 03/13/04			Time: 03:19 PM STORE: All Stores	
ZONE	ORDERS	PRIORITY	DELIVER TO	PROD(S)	MISC INFO	
NAPERVILLE	01/031709	ASAP	Sarah Kosnoff 2000 Ogden Ave NAPERVILLE, IL 60563 6305559016	1 LATEX BALLOON(S) 1 LUCKY BAMBOO TOTAL PRODS: 2	ENTRY DATE: 03/10/04 TIME:02:54: PM	
NAPERVILLE	01/031710		Cathy Jameson 803 Raymond Road NAPERVILLE, IL 60563 6305558012	1 DISH GARDEN TOTAL PRODS: 1	ENTRY DATE: 03/10/04 TIME:02:57: PM	
TOTAL FOR ZONE: NAPERVILLE: 2 orders						
NORTH AURORA	01/031711		Kenneth Gambacorta 446 Eola Road AURORA, IL 60504 6305558901	1 BLOOMING PLANT(S) 1 GREETING CARD(S) TOTAL PRODS: 2	ENTRY DATE: 03/10/04 TIME:03:01: PM	
TOTAL FOR ZONE: NORTH AURORA: 1 orders						
West Aurora	01/031712		Leslie Catera 981 Red Hawk Drive AURORA, IL 60504 6305556734	1 BASKET ARRANGEMENT TOTAL PRODS: 1	ENTRY DATE: 03/10/04 TIME:03:01: PM	
TOTAL FOR ZONE: West Aurora: 1 orders						
TOTAL FOR ZONE: N/A: 0 orders						
TOTAL FOR ZONE: PICK UP: 0 orders						
TOTAL FOR ZONE: Downtown Naperville: 0 orders						
TOTAL FOR ZONE: East Aurora: 0 orders						
TOTAL FOR ZONE: James Funeral Service: 0 orders						
TOTAL FOR ZONE: Lombard: 0 orders						
TOTAL FOR ZONE: Downers Grove: 0 orders						
GRAND TOTAL: 10 ZONES: 4 ORDERS						

Generating the Non Routed Orders Report

TASK To generate the Non Routed Orders report:

- 1 On the **Reports** menu, click **Delivery Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**. When the Delivery Report window opens, today's date is listed in the **Delivery Date** field. If you want to print a delivery route for a different date, click the arrow and select that date from the calendar.
- 3 In the **Report Type** section, select **Non Routed Orders Report**.
- 4 In the **Filter Criteria** section, select the delivery zones that you want to print. To select a delivery zone, click in the check box next to the zone so that a check mark appears. To select all delivery zones, scroll to the bottom of the list of delivery zones and check **All Zones**.
- 5 Click **Finish**. The report generates in Microsoft Excel.

TASK To print the report from Microsoft Excel:

On the Excel menu bar, click **File**, then click **Print** to print the report.

TASK To save the report in Microsoft Excel:

On the Excel menu bar, click **File**, then click **Save** to save the report.

Both Routed and Non Routed Orders Report

The Both Routed and Non Routed Orders report prints routed and non-routed orders for a particular delivery date. The following two types of orders print on this report:

- » Orders in COMPLETE delivery routes (orders that are in SAVED routes do not print)
- » Delivery orders that have been entered in Order Entry for the given date range, but have not been routed.

Figure 14-51: Sample Delivery Report: Both Routed and Non Routed Orders Report

Both Routed and Non Routed Orders Report			
Date: 03/17/04	ORDERS NOT Routed AND ORDERS Routed FOR DELIVERY DATE: 03/17/04		Time: 12:22 PM STORE: All Stores
ORDER	DELIVERED TO	PROD(S)	MISC INFO
NON Routed ORDERS FOR ZONE: Downers			
000002/1	Leslie Washington 3113 WOODCREEK DR DOWNERS GROVE, IL 60515-8412	1 The FTD Smooth Jazz Bouquet TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:30: AM PRIORITY: BEFORE 10AM
000005/1	Frank Lioteinne 1298 BUTTERFIELD RD DOWNERS GROVE, IL 60515-1032 6305559969	1 The FTD Joys of the Season Wreath TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:35: AM PRIORITY:
TOTALS FOR ZONE	Downers Grove 2 NON Routed ORDERS 0 Routed ORDERS		
ROUTED ORDERS FOR ZONE: Naperville			
000004/1	Laura Leider 1102 RAYMOND DR NAPERVILLE, IL 60563-4041 6305558992	1 The FTD Holiday Pizzazz Centerpiece TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:33: AM PRIORITY:
000006/1	Kristi Jones 100 OLESEN DR NAPERVILLE, IL 60540-5858 6305557781	1 The FTD Celebration Of Life Bouquet TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:36: AM PRIORITY:
TOTALS FOR ZONE	Naperville 0 NON Routed ORDERS 2 Routed ORDERS		
ROUTED ORDERS FOR ZONE: North Aurora			
000001/1	Karen Smith 2345 SHADOW HILLS LN AURORA, IL 60504-6293 6305558901	1 The FTD Changing Colors Bouquet TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:29: AM PRIORITY: ASAP
000003/1	Cathy Lewis 2000 OGDEN AVE AURORA, IL 60504-7222 6305556906	1 The FTD Holiday Fruit Basket TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:32: AM PRIORITY:
000007/1	Elizabeth Connelley 320 N EOLA RD AURORA, IL 60504-9062 6305559822	1 The FTD Paradise Island Arrangement TOTAL PRODS: 1	ENTRY DATE: 03/17/04 TIME:11:37: AM PRIORITY:
TOTALS FOR ZONE	North Aurora 0 NON Routed ORDERS 3 Routed ORDERS		
TOTALS FOR ZONE	N/A 0 NON Routed ORDERS 0 Routed ORDERS		
TOTALS FOR ZONE	Wire Out 0 NON Routed ORDERS 0 Routed ORDERS		
TOTALS FOR ZONE	Lombard 0 NON Routed ORDERS 0 Routed ORDERS		

Generating the Both Routed and Non Routed Orders Report

TASK To print the Both Routed and Non Routed Orders report:

- 1 On the **Reports** menu, click **Delivery Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 3 When the **Delivery Report** window opens, today's date is listed in the **Delivery Date** field. If you want to print a delivery route for a different date, click the arrow and select that date from the calendar.
- 4 In the **Report Type** section, select **Both Routed and Non Routed Orders Report**.

- 5 In the **Filter Criteria** section, select the delivery zones that you want to print. To select a delivery zone, click in the check box next to the zone so that a check mark appears. To select all delivery zones, scroll to the bottom of the list of delivery zones and check **All Zones**.
- 6 Click **Finish**.

TASK To print the report from Microsoft Excel:

On the Excel menu bar, click **File**, then click **Print** to print the report.

TASK To save the report in Microsoft Excel:

On the Excel menu bar, click **File**, then click **Save** to save the report.

Delivered Orders Report

The Delivered Orders Report prints all orders that have been marked Delivered for a particular delivery date. Orders are sorted by delivery zone.

Figure 14-52: Sample Delivery Report: Delivered Orders Report

Delivered Orders Report				
Date: 03/09/04	DELIVERED REPORT FOR DELIVERY DATE: 03/09/04			Time: 02:07 PM STORE: All Stores
ZONE	ORDER	DELIVER TO	PROD(S)	MISC INFO
NAPERVILLE	01/031697	Sarah Moretto 1339 Branchwood Circle NAPERVILLE, IL 60563 6305554481	1 BASKET ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031696	Karen Smith 3390 Hobson Road NAPERVILLE, IL 60564 6305558091	1 FRESH ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031695	Marcus Gilding 1862 Butterfield Road NAPERVILLE, IL 60563 6305551141	1 DISH GARDEN TOT PRODS: 1	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031691	Frank and Linda Polotto 6002 Henderson Drive NAPERVILLE, IL 60565 6305550008	2 LUCKY BAMBOO TOT PRODS: 2	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031693	Cathy Snobel 28141 Diehl Rd WARRENVILLE, IL 60555 6305553890	1 BABY BOY NOVELTY ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
NAPERVILLE	01/031699	Jenny Miller 1523 North Aurora Road NAPERVILLE, IL 60563 6305559012	1 AZALEA PLANT TOT PRODS: 1	DELIVERED: Y PRIORITY:
TOTAL FOR ZONE NAPERVILLE: 6 orders				
NEAR COUNTY	01/031685	Lisa Jones 1020 Main Street Naperville, IL 60563 6305558849	1 BASKET ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
NEAR COUNTY	01/031686	Stefanie Laggos 8 Wyndham Circle Naperville, IL 60563 6303630901	1 BASKET ARRANGEMENT TOT PRODS: 1	DELIVERED: Y PRIORITY:
TOTAL FOR ZONE NEAR COUNTY: 2 orders				
TOTAL FOR ZONE N/A : 0 orders				
TOTAL FOR ZONE PICK UP : 0 orders				
TOTAL FOR ZONE Wire Out : 0 orders				
TOTAL FOR ZONE Downers Grove : 0 orders				
TOTAL FOR ZONE Downtown Naperville : 0 orders				
TOTAL FOR ZONE East Aurora : 0 orders				
TOTAL FOR ZONE James Funeral Service : 0 orders				
TOTAL FOR ZONE Lombard : 0 orders				
GRAND TOTAL: 10 ZONES 8 ORDERS				

Generating the Delivery Trip Analysis Report

TASK To generate the Delivery Trip Analysis report:

- 1 On the **Reports** menu, click **Delivery Trip Analysis Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**. The Delivery Trip Analysis window opens.

Figure 14-54: Delivery Trip Analysis Window

- 3 When the **Delivery Trip Analysis** window opens, in the **Delivery Date Range** section, select a start and end delivery date of orders that you want to include on the report. To select a date, click the arrow so that a calendar appears, then click on the date.
- 4 In the **Driver Number** field, select the name/number of the driver that you want to print. To print all drivers, select **All Drivers**.
- 5 Click **Finish**. The report generates in Microsoft Excel.

TASK To print the report from Microsoft Excel:

On the Excel menu bar, click **File**, then click **Print** to print the report.

TASK To save the report in Microsoft Excel:

On the Excel menu bar, from the **File** menu, click **Save**.

Delivery Problem Report

The **Delivery Problem Report** prints orders that have not been delivered due to a delivery problem (not home, refused, etc.). The report prints all orders that have been marked for follow-up delivery through Mercury Delivery on the day the order is to be redelivered. Use the Follow Up Deliveries option to mark these orders Delivered when they are delivered (see [Follow Up Deliveries](#) on page 14-30) or re-route the orders.

IMPORTANT Orders marked not-delivered in Order Entry or Point of Sale are not included in this report.

Figure 14-55: Sample Delivery Problem Report

ORDER #	DELIVERY DATE	PRIORITY	NAME/ADDRESS	MISC INFO
000001/1	3/9/04		Karen Smith 2345 SHADOW HILLS LN AURORA,IL 60504-6293 6305558901 REASON: Not at Home	ENTRY DATE: 03/9/04 ENTRY TIME:11:29: AM ZONE---North Aurora DRIVER: John, ATTEMPTS: 1
000004/1	3/9/04		Laura Leider 1102 RAYMOND DR NAPERVILLE,IL 60563-4041 6305558992 REASON: Refused	ENTRY DATE: 03/9/04 ENTRY TIME:11:33: AM ZONE---Naperville DRIVER: Vince, ATTEMPTS: 1
000006/1	3/9/04	B2P	Kristi Jones 100 OLESEN DR NAPERVILLE,IL 60540-5858 6305557781 REASON: Not at Home	ENTRY DATE: 03/9/04 ENTRY TIME:11:36: AM ZONE---Naperville DRIVER: Vince, ATTEMPTS: 1

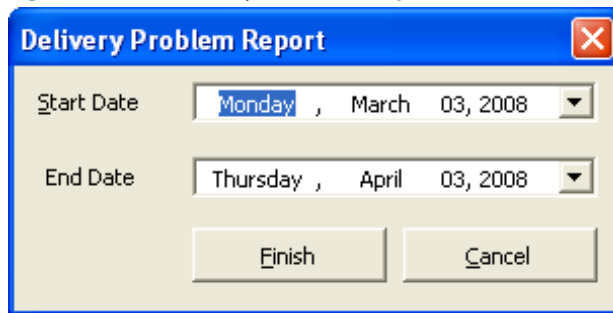
TOTAL NUMBER OF NON DELIVERED ORDERS: 3

Generating the Delivery Problem Report

TASK To generate the Delivery Problem report in Mercury Delivery:

- 1 On the **Reports** menu, click **Delivery Problem Report**.
- 2 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**. The Delivery Problem Report window opens.

Figure 14-56: Delivery Problem Report Window



- 3 When the **Delivery Problem Report** window opens, select a date range of orders to include. Select a start and end date by clicking the down arrows in the appropriate fields and then clicking on the date.
- 4 Click **Finish**. The report opens in Microsoft Excel.

TASK To print the report from Microsoft Excel:

On the Excel menu bar, on the **File** menu, click **Print** to print the report.

TASK To save the report in Microsoft Excel:

On the Excel menu bar, on the **File** menu, click **Save** to save the report.

Reference

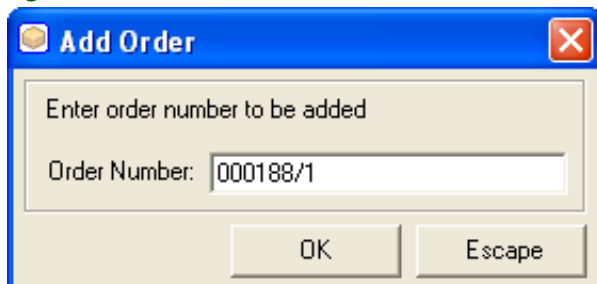
The following windows and screens are available in Mercury Delivery:

- » [Add Order Window](#)
- » [Add Zone Window](#)
- » [Complete Route Window](#)
- » [Create Zone Window](#)
- » [Optimize Route Options Window](#)
- » [Order Details Window](#)
- » [Redelivery Window](#)
- » [Rename Route Window](#)
- » [Route Origin Window](#)
- » [Routing Progress Window](#)
- » [Select Routing Progress Window](#)
- » [Select Saved Routes Window](#)
- » [Truck Stop Details Window](#)

Add Order Window

The **Add Order** window allows you to add orders to the delivery route that do not already display in the Orders for Zone(s) section on the left hand side of the Create Routes screen.

Figure 14-57: Add Order Window



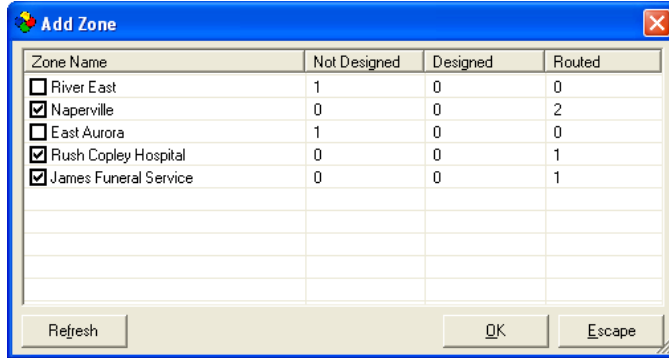
To add an order, type the order number followed by a forward slash and the ticket number (for example, type 000015/1) and then click **OK**. The order will be added to the screen and will be available to route.

You can also scan the ticket's bar code (from an invoice). The ticket is automatically added to the route.

Add Zone Window

The **Add Zone** window allows you to add delivery zones to the route that you are creating. This window brings up all of your delivery zones that have orders available to route.

Figure 14-58: Add Zone Window

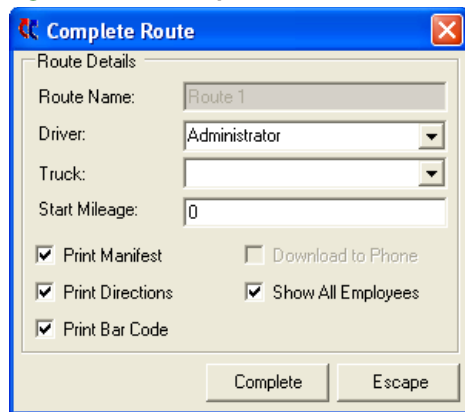


The delivery zones that you are currently routing will be checked. To add another delivery zone, click on that zone so a check mark appears, and then click **OK**. All orders within that delivery zone will be added to the screen and will be available to route.

Complete Route Window

The **Complete Route** window allows you to complete the delivery route (the delivery slip and driving directions will print, and the route cannot be changed).

Figure 14-59: Complete Route Window



Complete the following truck and driver information:

Table 14-7: Complete Route Window Settings

Field	Description
Route Name	The name of the route.
Driver	This field contains all of your employee IDs, listed in alphabetical order. Click the down arrow and select the name of the employee that will be delivering the orders on this route, or type the first few letters of the employee's ID to display it in the list.
Truck	Type the name of the truck that is being used for delivery (optional). The truck name that you type here will be saved so that you can select it from a drop-down list next time you complete a route.
Start Mileage	Type the mileage of the truck before it leaves on the route (if you track truck mileage using the Delivery Trip Analysis report).
Print Manifest	To print the route manifest (routing slip), make sure this option is checked.

Table 14-7: Complete Route Window Settings (cont.)

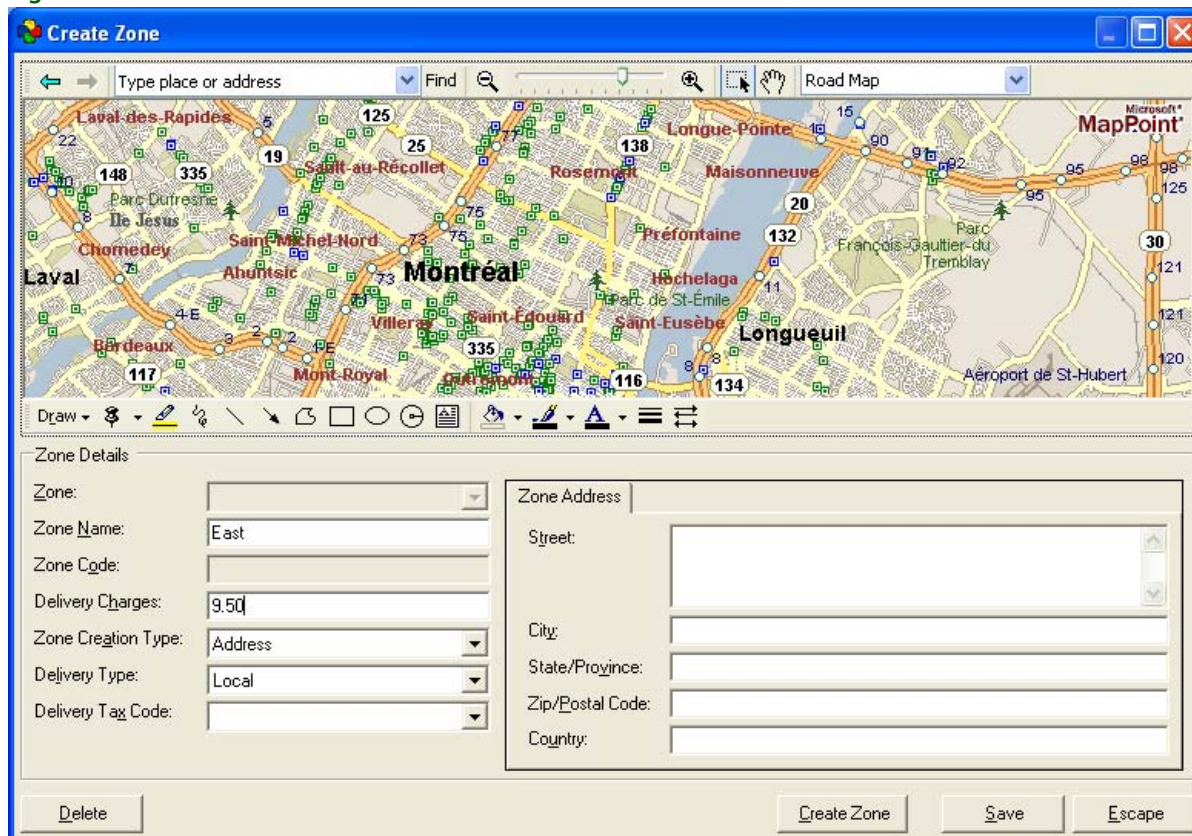
Field	Description
Print Directions	To print the driving directions, make sure this option is checked.
Print Barcode	To print the barcode of the ticket on the route manifest, make sure this option is checked.
Print Bar Codes	To print the bar codes of ticket numbers on the route manifest, ensure this option is selected.
Download to Phone	This option will only be active if the delivery driver that you selected is set up to use Wireless Delivery Confirmation. If the field is active, you can click this check box to download the route to the employee's phone. See "Downloading the Route Information to the Phone" on page 78.
Show All Employees	By default, only employees with a truck driver employee type are listed in the Driver field. Select this option if you would like to view all employees.

Click **Complete** when you are ready to complete the route and print the manifest and/or driving directions.

Create Zone Window

When you create or edit a zone in Mercury Delivery, you do so using the **Create Zone** window. The window consists of two main areas: a map with drawing controls, and a details area, containing detailed information about the zone.

Figure 14-60: Create Zone Window



Zone Details Area

The **Zone Details** area contains information about the zone you are creating or editing. For zones of **Address** or **Postal Code** type, additional fields are included in tabs on the right side of the area.

Table 14-8: Zone Details Area Settings

Setting	Description
Zone	If you are editing an existing zone, select it from this list.
Zone Name	If you are creating a new zone, enter the name for this zone in this field.
Zone Code	This field will always be blank and inactive in FTD Mercury. It is only used when part of an FTD Mercury Advantage system.
Delivery Charges	Enter the delivery charge for this zone.
Zone Creation Type	From this list, select Map , Address , or Postal Code . If you select Map , draw the zone on the map. If you select Address , the Zone Address tab appears, allowing you to specify the address for this zone. If you select Postal Code , enter one or more ZIP/postal codes you want included in this zone in the Zone Zip Code(s) tab.
Delivery Type	From this list, select either Local or Wire Out . Select Local for any zones to which your store will actually deliver products; select Wire Out for zones for which you will be sending outgoing orders.
Delivery Tax Code	Optionally select a tax code to associate with this zone.

Zone Address Tab

When you select the **Zone Creation Type** of **Address**, the **Zone Address** tab appears. You need to provide the address for this delivery zone.

Table 14-9: Zone Address Area Settings

Setting	Description
Street	Enter the street address.
City	Enter the city for this address.
State/Province	Enter the state or province for this address.
Zip/Postal Code	Enter the ZIP or postal code for this address.
Country	Enter the country in which this address is located.

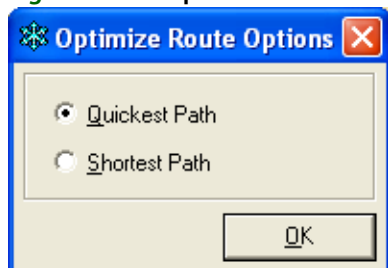
Zone Zip Code(s) Tab

If you select the **Zone Creation Type** of **Postal Code**, the **Zone Zip Code(s)** tab appears. Enter a ZIP/postal code in the **Zip Code** box and click **Add** to add it to the ZIP/Postal Code list.

Optimize Route Options Window

The **Optimize Route Options** window allows you to change the map and driving directions based on the quickest or shortest driving path. Select **Quickest Path** (to select the fastest path) or **Shortest Path** (to select the path with the shortest distance) and then click **OK**. The map and driving directions will be updated accordingly.

Figure 14-61: Optimize Route



Order Details Window

The **Order Details** window displays the sale and product information for the order. The products to be delivered are listed in the middle of the window.

Figure 14-62: Viewing Order Details



The top of the screen lists the general order information:

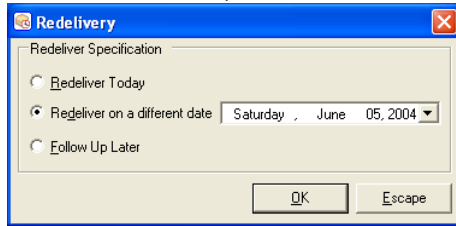
Table 14-10: Order Details Window Information

Information	Description
Invoice No	The Order Entry invoice number and ticket number for the order.
Sale Date	The date that the sale was entered.
Total Number of Items	The total number of products in the order.

Redelivery Window

The **Redelivery** window allows you to indicate when you would like to redeliver the order.

Figure 14-63: Redelivery Window



Following are your options in this window:

Table 14-11: Redelivery Options

Option	Description
Redeliver Today	Removes the order from the Truck Return or Follow Up Deliveries screen and moves it to the list of today's deliveries where it can be re-routed.
Redeliver on a Different Date	Removes the order from the Truck Return or Follow Up Deliveries screen and moves it to the list of that day's deliveries where it can be re-routed. The delivery date change is posted to order notes.
Follow Up Later	Does not assign the order to a particular delivery date. The order will remain in Follow Up Deliveries until you assign a delivery date.

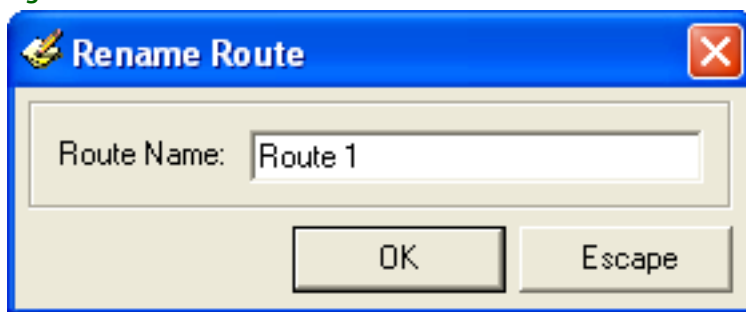
NOTE If an order is re-routed, the order will still be listed in the history of the original delivery route (when printing the original route in the **Reprint Route** report or the **Delivery Trip Analysis** report).

Click **OK** when you are finished.

Rename Route Window

The Rename Route window allows you to enter a new name for a delivery route. Enter a new name for the route in the text field, and then click **OK**.

Figure 14-64: Rename Route Window



Route Origin Window

For the map and driving directions to be correct, the driver's origin must also be correct. Most likely, the driver's origin will be your shop address, but you can specify any other address as well.

In the Route Origin window, indicate if you want the route to originate from the store address or another address. If you select Other, enter the address. Click **OK** when you are finished.

Figure 14-65: Specifying a Route Origin

Routing Progress Window

The **Routing Progress** window allows you to view the current status of a delivery route.

Figure 14-66: Routing Progress Screen

Stop N	Invoice No	Recipient Name	Address	City	State	Zip	Zone	Priority
1	000020/1	Sarah Moretto	1339 Branchwood Circle	NAPERVILL	ILLINOIS	60563	Naperville(4
2	000017/1	Jenny Miller	1523 North Aurora Road	NAPERVILL	ILLINOIS	60563	Naperville(7
3	000019/1	Cathy Snobel	28141 Diehl Rd	WARRENVIL	ILLINOIS	60555	Naperville(9
4	000018/1	Frank Smith	1212 South Naper Blvd	NAPERVILL	ILLINOIS	60540	Naperville(9

You can view the progress of the delivery route by looking at the delivery map. Each stop is marked with a truck icon, indicating that the order is on the truck. To view the details of a particular stop, you can double click on the truck icon for that stop.

This screen also allows you to print the driving directions, map, or delivery manifest.

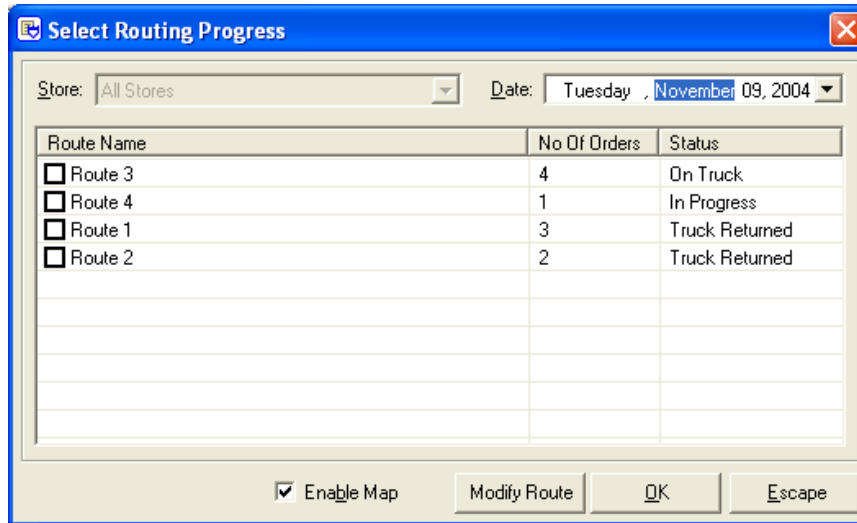
If you have Wireless Delivery Confirmation, the **Routing Progress** window can show you which orders have been marked **Delivered** or **Not Delivered** by the delivery driver. Double-click on the truck icon for any stop to see the delivery status.

If you have GPS, you can view the live location of your delivery driver. The map refreshes every few seconds.

Select Routing Progress Window

By default, this window lists routes for the date that you selected in the main delivery screen (Delivery Snapshot screen).

Figure 14-67: Select Routing Progress Window



To see routes saved for another date, change the date in the **Date** field. To bring up a route on the screen, check the check box next to that route so that a check mark appears, then click **OK**.

When creating delivery routes, you have the option of displaying a map that outlines your delivery route. If you would like to see the map, make sure **Enable Map** is checked. Clearing this option will not display a map (because a map does not have to be loaded by the program, you will notice increased program speed if you leave **Enable Map** unchecked).

A status type is listed for each delivery route:

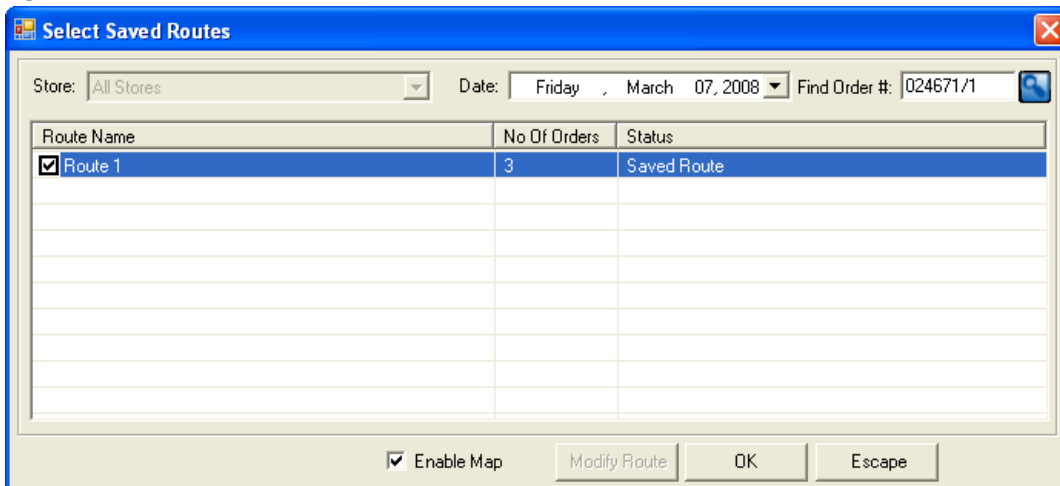
Table 14-12: Delivery Status Types

Status	Description
On Truck	The delivery route has been completed. No changes have been made to the orders in the route (such as marked Delivered or Not Delivered). If you are working in the Select Routing Progress screen, this type of delivery route can be updated by selecting the route and then clicking Modify Route (you can add orders to the route, change the delivery order, etc.).
Truck Returned	The Truck Return process for the delivery route has been completed. The orders in the route have all be marked Delivered or Not Delivered, either in the Mercury Delivery application or on the Wireless Delivery phone. No changes can be made to this type of delivery route.
On Phone	If you checked Download to phone when you completed the delivery route, the route will have the On Phone status. No changes can be made to this type of delivery route.
In Progress	If you have made changes to the route, such as marked some orders Delivered or Not Delivered, the route will have the In Progress status. No changes can be made to this type of delivery route.

Select Saved Routes Window

By default, this window lists routes for the date that you selected in the main delivery screen (Delivery Snapshot screen).

Figure 14-68: Saved Route Window



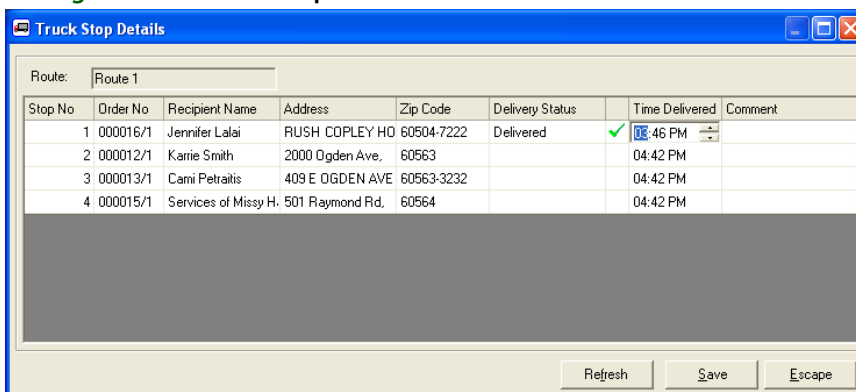
To see routes saved for another date, change the date in the **Date** field. To bring up a route on the screen, check the check box next to that route so that a check mark appears, then click **OK**. To find the route that contains a specific order, enter the order number in the Find Order # field, then press Return. You can also use a bar code scanner, if available, to populate the order number field by scanning the bar code on the invoice.

When creating delivery routes, you have the option of displaying a map that outlines your delivery route. If you would like to see the map, make sure **Enable Map** is checked. Clearing this option will not display a map (because a map does not have to be loaded by the program, you will notice increased program speed if you leave Enable Map unchecked).

Truck Stop Details Window

The **Truck Stop Details** window lists all of the orders in the selected route.

Figure 14-69: Truck Stop Details Window



From this list, mark each order with a delivery code (delivery codes are set up in Mercury Administration). To do this, click inside the **Delivery Status** column so that a down arrow appears. Then click the down arrow and select a delivery code from the list.

If the delivery code is a **Delivered** code, the order will display a green check mark next to it, indicating that it was delivered. If the delivery code is a **Not Delivered** code, the order will display a red cross mark next to it, indicating that it was not delivered.

Next, you can type the time the order was delivered in the **Time Delivered** column (you must maintain delivery times if you would like to print the **Delivery Trip Analysis** report). If you do not indicate a delivery time, the current time will be saved as the delivery time. Type any comments on the delivery in the **Comment** column if desired.

To indicate the time an order was delivered, click inside of the **Time Delivered** column so that the current time displays. Highlight the hour/minutes, then use the up and down arrows to change the time.

To add comments to an order, click inside of the **Comment** column and begin typing.

When you are finished marking deliveries, click **Save**.

Mercury Marketing

FTD Mercury gives you several marketing options:

- » FTD Mercury provides you with standard marketing letters that you can use to market to sending florists, customers, and recipients. See [Marketing Letters](#) on page 15–3.
- » You can assign marketing categories to your customers so that you can better target them when printing marketing letters. See [Marketing Categories](#) on page 15–14 for details.
- » The Mercury Marketing upgrade module allows you to create direct mail and email marketing campaigns using professionally designed email templates, as well as Microsoft Word templates formatted for letters or postcards. See [Mercury Marketing Module](#) on page 16–1 for details.

This chapter covers marketing options included in the base version of FTD Mercury. If you want to order the Mercury Marketing module, contact Mercury Technology Sales at 1-800-767-3222.

Marketing Ideas

Looking for some marketing ideas? The following list of marketing ideas was compiled by fellow member florists. Try some of these methods to see which ones work best in your area.

- » Send direct mail to parents of college freshman who are members of sororities. If you obtain the address list from the college, you can take the data to the post office and the post office will create the mailer and handle the mailing as well. Obtaining the parents' addresses may be a challenge, but the pay off is well worth it. The students will belong to the sorority all four years of college.
- » Magnets are a great giveaway. Popular magnet giveaways are either the business card size or ruler size. The business card type can even have coupons attached. Take the business card information, add coupons to the bottom, and attach a magnetic strip to the back side.
- » Your neighborhood Welcome Wagon receives approximately 35 to 40 new names monthly. Inquire about advertising options with the Welcome Wagon. For example, you can give new home owners a packet that contains a letter, magnet, and a coupon for 10% off their first purchase. You can also contact your local Chamber of Commerce for similar marketing opportunities.
- » Consider offering a VIP frequent purchase card. The frequent purchase card can be used to track purchases, offer a discount or a free item after so many purchases, etc. You can also provide the customer with a sleeve to store the VIP card. The sleeve is a great place to advertise your products and services.
- » Work with schools and organizations to help raise money. For example, you can sell a coupon card for free flowers or coupons to use towards a purchase.

- » Place a changeable copy sign outside in front of your shop. Place special advertisements on the sign, such as "Receive a free flower for stopping in on your birthday," or "Receive a free flower if your name is ----." Change the sign frequently.
- » Send a rolodex card and welcome letter to new customers.
- » Work with the Susan G. Komen Foundation as a Valentine's Day promotion. For example, sorority sisters from a local college (or any group of volunteers) can deliver flowers on Valentine's Day and pass out pamphlets regarding breast cancer awareness. You can then donate the \$7.00 delivery charge for each delivery to the Komen foundation. Volunteers from a local chapter of the Susan G. Komen foundation may also work in your store and donate funds based on the hours worked.
- » Send reminder cards for birthdays, anniversaries, holidays, etc. Most florists find that the returns are great for this type of marketing.
- » Send a postcard to customers who have not purchased in a while saying that "we miss you."
- » Meet with local funeral directors to discuss products and services that you offer. Provide them with pictures, prices of your work, or the FTD Selection Guide. You can make commission arrangements with the funeral director. For example, if the funeral director refers a customer to the shop, they can receive a commission of 5%. If the funeral director handles the entire order, they can receive a 10% commission.
- » Advertise in the local newspaper on the Obituary page.
- » When advertising in the newspaper, select an appropriate section for your ad based on your message.
- » If your local newspaper is available online, create a link to your Web site through the Obituary page. Newspapers normally charge a monthly fee for this service.
- » Partner with a local restaurant. Provide them coupons for a discount or free bouquets that they can pass out to their regular customers as a thank you. Reverse the same courtesy to the restaurant; include with monthly statements a coupon for a free drink, etc. from the restaurant as a thank you. Locally owned restaurants are usually more willing to form this type of partnership (vs. chain restaurants).
- » Use column ads or bold listings in the yellow pages. Most florists find that the bold listings are successful. If you use the yellow pages, show product arrangements, prices, etc. Customers already have a need to buy!
- » Billboards are relatively inexpensive given the passers by.

NOTE

- Be careful if advertising on a billboard for a specific holiday. If your contract is up and the bill board has not been resold, your holiday message may still be there after the holiday.
- » Send the recipients of your product a thank you postcard combined with a self survey. They can rate you on your performance, quality, etc. and detach the postcard, which can be sent back to the sender of the flowers as a thank you.
 - » Pick a charity and be their florist. Most big charities have fund raising events that need flowers. Offer to donate the floral decorations in return for advertising and mentions in programs and all media notices.
 - » Delivers your "non-saleable" bouquets from your cooler to local hospitals, the Chamber of Commerce, City Hall, etc. with your card on it. If you are concerned that the arrangement is not a true representation of the quality of product from your store, perhaps a card included could indicate the product is past its prime.
 - » Run a monthly floral drawing where customers must enter to win.
 - » You can offer discounted flowers delivered to patients in hospitals and nursing homes on a specific holiday. For example for Christmas, you can use poinsettias that are left over from your

or your grower's inventory. You can sell these for a reduced rate, but your customers pay you \$5.00 for example to make the delivery. This way you get your customers involved in sending flowers to patients—it's a win-win for all.

Marketing Letters

Using forms provided in FTD Mercury, you can create several different letters for marketing purposes, including thank you letters for florists who have sent you business, discount letters, reminders to customers of upcoming occasions, and even completely custom letters. You can also print matching address labels, making the process of addressing these envelopes quick and efficient. FTD Mercury is designed to print labels using a template for Avery Standard 8160 labels, which can be purchased at most office supply stores.

Marketing Letter Tasks

- » [Printing Florist Thank You Letters](#)
- » [Printing Order Recipient Discount Letters](#)
- » [Printing Mailing Labels](#)
- » [Printing Occasion Code Letters](#)
- » [Creating Customer Letters](#)
- » [Printing Delinquency Letters](#)
- » [Modifying Letter Templates](#)

Printing Florist Thank You Letters

FTD Mercury provides you with a way to print thank you letters to florists who have sent you business, as well as the ability to print matching address labels. The mail merge capability makes addressing these letters and envelopes an efficient process.

TASK To print thank you letters with matching address labels:

- 1 On the **Management** menu, click **Reports and Templates**.
- 2 Double-click the **Mercury Forms** folder.
- 3 Double-click the **Letters and Templates** folder.
- 4 Double-click on the **Florist Thank You** icon to open the template.
- 5 When the **FTD Mercury - Florist Thank You Letter** window opens, click **Next**.
- 6 In the **Select Start Date** window, select the month, day of the month, and year you wish to start the extraction. Then, click **Next**.
- 7 In the **Select End Date** window, select the month, day of the month, and year you wish to end the extraction. Then, click **Next**.
- 8 When the **Sender Information** window opens:
 - a. In the **Enter the sender's name** field, enter the name of the person who is signing the letters (for example, the store owner).
 - b. In the **Select a Store** field, click the arrow and select the name of the store sending this letter.
 - c. Click **Next**.
- 9 Review the information you have just entered in the **Finish** window. If you need to change information, you may click the **Back** button to go back to any previous screen(s) and change information. If the information is correct, click **Finish**.

- 10 When the **Mailing Labels** window opens and prompts you with *Would you like to create mailing labels?*, click **Yes** to create matching labels for letter recipients, or click **No** to print the letters only. If you chose **No**, skip to step 15 below.
- 11 When the **Labels** document opens displaying the completed labels, load your Avery 8160 Standard labels and select **File, Print**.
- 12 When the label printing is complete, select **File, Close**. When prompted, indicate if you want to save the document.
- 13 When the **Form Letters** document reappears, load the paper in the printer and select **File, Print**.
- 14 When the letter printing is complete, select **File, Close**. When prompted, indicate if you want to save the document.

Florist Thank You Letter

October 1, 2005

FTD Flower Store
3113 Woodcreek Drive
Downers Grove, IL 60515

Dear Fellow FTD Florist:

Thank you for your recent floral order.

We at FTD Flower Store appreciate your confidence and trust in us. Like you, we strive to provide quality service and products to our customers. Rest assured, orders we receive from fellow FTD Florists are treated with the same care and attention as our everyday customers here in our shop.

If you should need more floral orders filled in this area sometime in the future, we hope that you will remember us.

Once again, thanks for your patronage!

Regards,
FTD Flower Store

Printing Order Recipient Discount Letters

FTD Mercury enables you to print discount letters to order recipients, including matching address labels. You can choose to print letters for Order Entry recipients (using data from Order Entry) or Mercury order recipients (using data from incoming Mercury orders).

TASK To print order recipient discount letters:

- 1 On the **Management** menu, click **Reports and Templates**.
- 2 Double-click the **Mercury Forms** folder.
- 3 Double-click the **Letters and Templates** folder.
- 4 Double-click on the **10% Off** icon to open the template. The 10% Discount Letter window opens.

Figure 15-1: 10% Discount Letter Window

- 5 In the **Type** area, select whether you want to send discount letters to Mercury order recipients or Sales Order recipients. This selection determines which recipient information to print. If you select Mercury 10% Discount Letter, FTD Mercury prints only incoming Mercury order recipients. If you select **Sales Order 10% Discount Letter**, the system prints only Order Entry recipients (including Mercury orders attached in Order Entry).
- 6 In the **Sender's Name** field, type the name that you want to appear on the signature line of the letter (such as the employee sending the order, or the store owner).
- 7 If you have multiple stores, select the sending store in the **Select Store** field.
- 8 In the **Date Range** area, select the start and end dates for the orders that you want to include in the merge.
- 9 If you want to exclude orders with the **Sympathy** occasion code, make sure the check box is selected at the bottom of the window. It is highly recommended to keep this box selected so that you do not accidentally print and mail a letter to a sympathy recipient.
- 10 Click **Finish**.
- 11 At Would you like to create mailing labels?, click **Yes** to create matching labels for letter recipients, or click **No** to print the letters only. If you chose No, skip to step 13 below.
- 12 When the **Labels** document opens displaying the completed labels, load your Avery 8160 Standard labels and select **File, Print**.
- 13 When the label printing is complete, select **File, Close**. When prompted, indicate if you want to save the document.
- 14 When the **Form Letters** document reappears, load the paper in the printer and on the File menu, click Print.
- 15 When the letter printing is complete, on the File menu, click Close. When prompted, indicate if you want to save the document.

Recipient Discount Letter

Get 10% Off Your
Next Floral Purchase!
(if you save this letter)

October 1, 2005

John Smith
2131 Yellowstar Lane
Springfield, VA 12345

Dear John Smith,

On 09/06/01 you received a floral order from our shop, The Flower Store. We hope that you were pleased with your arrangement and enjoyed the special sentiment that flowers convey.

When you have a special occasion to celebrate or a sentiment you'd like to convey, we hope that we can be your first choice. The Flower Store is an FTD member, which means you'll get the highest quality products and speedy service that's recognized around the world.

As a special offer to recipients from our shop, we'd like to extend a one-time 10% discount on any order that you place within 90 days.

All you have to do is bring this letter into our shop to receive your special discount. For phone orders just give us the code number at the bottom of this letter. Either way, you can save money.

We hope to serve you soon!

Regards
The Flower Store

P.S. Don't throw away the letter! Remember, this offer is good for 90 days.

Phone order code: FTD-A1

Printing Mailing Labels

FTD Mercury enables you to print mailing labels for customers and order recipients. It is designed to use Avery Standard 8160 address labels, which can be purchased from most office supply stores.

TASK To print mailing labels:

- 1 On the **Management** menu, click **Reports and Templates**.
- 2 Double-click the **Mercury Forms** folder.
- 3 Double-click the **Letters and Templates** folder.
- 4 Double-click the **Mailing labels** template. The **Mailing Labels** window opens.

Figure 15-2: Mailing Labels

- 5 In the **Type** section, select whether you want to print **Mercury Mailing Labels** or **Sales Order Mailing Labels**. **Mercury Mailing Labels** prints labels for recipients of Mercury orders; **Sales Order Mailing Labels** prints labels for customers or recipients that placed orders that were processed through Order Entry (local or wire out orders).
- 6 In the **Print Customer/Recipient Labels** area, select whether you want to **Print Labels Within Date Range** or **Print All Labels**. If you select **Print Labels Within Date Range**, the **Date Range** section becomes active so that you can enter a date range.
- 7 If you selected to print **Sales Order Mailing Labels**, then select in the **Select Address Type for Mailing Labels** section if you want to create labels for **Customer Addresses** or **Recipient Addresses**. **Customer Addresses** prints labels for customers who placed orders at your shop. **Recipient Addresses** prints labels for the recipients of orders that were placed at your shop.
- 8 If you selected the **Print Labels Within Date Range** option, then you must specify a sale date range in the **Date Range** section. Click the down arrows in each of the **Start Date** and **End Date** sections to select start and end dates for the date range.
- 9 If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See [Marketing Screen](#) on page 24–21 for information on setting up these categories.)

To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.

To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.

- 10 When you have completed all of the information in this window, click **Finish**.
- 11 When the **Labels** window appears, load your Avery Standard 8160 labels and on the **File** menu, click **Print** to print your mailing labels.
- 12 When the label printing is complete, on the **File** menu, click **Close**. When prompted, indicate if you want to save the document.

Printing Occasion Code Letters

NOTE This report should only be printed if you have at least one of the following upgrade modules: Accounts Receivable, Order Entry, and/or Point of Sale.

Occasion code letters remind your customers of upcoming occasions for which they have previously made a purchase for your shop. These letters remind the customer of the special occasion, and offer product recommendations.

TASK To print occasion code letters:

- 1 On the **Management** menu, click **Reports and Templates**.
- 2 Double-click the **Mercury Forms** folder.
- 3 Double-click the **Letters and Templates** folder.
- 4 Double-click on the **Occasion Code** icon to open the template.

Figure 15-3: Occasion Letter Window

FTD Mercury - Occasion Letter

Sender Information

Senders name: Carrie Smith

Select Store: The Flower Shop

Occasion Code

Code: Anniversary

Date Range

Start Date: 3/16/2002

End Date: 3/16/2003

Marketing Criteria Selection

Customers with Marketing Criteria Customers with No Marketing Criteria

Category
account type
<input type="checkbox"/> business
<input type="checkbox"/> non-profit
<input checked="" type="checkbox"/> personal
<input type="checkbox"/> school
age group
birthday month

Check All UnCheck All

Finish Cancel

NOTE Remember that the dates you are selecting in steps 8-9 refer to orders placed a year ago. This way, FTD Mercury can look back and see which customers placed an order during that time period.

- 5 In the **Sender's Name** field, type the name of the employee (or store owner) that is sending the letter. Then click the arrow in the **Select Store** field and choose the store from which this letter is being sent.
- 6 Click the arrow in the **Code** field and choose the occasion for which you are creating letters.
- 7 In the **Date Range** section, select a start and end date for the data that you want to include in the report. Remember that these dates should be for orders that were placed last year.
- 8 If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See [Marketing Screen](#) on page 24-21 for information on setting up these categories.)
To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.
To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.
- 9 Click **Finish**.
- 10 At **Would you like to create mailing labels?**, click **Yes** to create matching labels for letter recipients, or click **No** to print the letters only. If you chose **No**, skip to step 11 below.
- 11 When the **Labels** document opens displaying the completed labels, load your Avery 8160 Standard labels and on the **File** menu, click **Print**.
- 12 When the label printing is complete, on the **File** menu, click **Close**. When prompted, indicate if you want to save the document.
- 13 When the **Form Letters** document reappears, you can customize your letters as desired. Type in suggested products and prices.

NOTE

If you want to quickly and easily replace the generic text in the letter with your own text, use the **Replace** command on the **Edit** menu. By doing this you can quickly "find" the generic text (such as the text that reads "[description, price]") and "replace" it with your own custom text (such as "a dozen roses for \$50."). Clicking **Replace All** replaces all of the generic text with your custom text.

- 14 When you are ready to print the letters, load the paper in the printer and on the **File** menu, click **Print**.
- 15 When the letter printing is complete, on the **File** menu, click **Close**. When prompted, indicate if you want to save the document.

Occasion Code Letter

You Have a Special Event Coming Up!

October 1, 2001

John Smith
123 Main Street
Lisle, IL 60532

Dear John Smith:

Last year you asked us to deliver a floral gift to Jane Smith on November 08, 2000. Would you like to celebrate this birthday with the memorable gift of flowers once more?

We have several products and different price levels to choose from. For example, our most affordable gift is [add detailed descriptions of most affordable product with price]. For just a few dollars more, you can choose an arrangement with [description, price]. And for that truly memorable gift, we can deliver an arrangement that includes [description, price].

Any of these products is sure to bring a smile to the face of someone special with a special event coming up. Call us today to place your order and ensure timely delivery of one of these lovely gifts.

Thank you for your business. We look forward to hearing from you soon!

Regards,
The Flower Store

P.S. In addition to the products described above, we'd be happy to customize an arrangement for you. Give us a call or stop on in!

Creating Customer Letters

The Customer Letter template allows you to create a custom letter to send to your customers. The template has been set up to merge your customer information so that each letter will be a professional, customized letter. Then you can create your own text message in the letter and save the template for later.

TASK To create a custom letter:

- 1 On the **Management** menu, click **Reports and Templates**.
- 2 Double-click the **Mercury Forms** folder.
- 3 Double-click the **Letters and Templates** folder.
- 4 Double-click on the **Customer Letter** icon to open the template. The following message appears:

The customer letter is designed to allow you to create a customized letter to send to your top customers. You can either edit and save the letter to be used later or use the letter as it exists now to generate custom letters.

At this time you must decide if you want to first generate the letters (merge the customer data) or edit the letter. FTD suggests you first edit the letter. Click **Edit Letter** to edit the letter.
- 5 Before editing the letter, make sure that you print the instructions that are on the letter. To do this, on the **File** menu, click **Print**. Save these instructions in case you have to refer to them at a later time.
- 6 Delete the instruction portion of the letter (between the asterisks (***) messages). Do not delete text marked by brackets (<<>>). This text marks where the customer data will be merged. If you edit this text then the data will not merge correctly.
- 7 Type the body of your letter (where the instructions used to be) in a standard letter format. Remember not to delete text marked by brackets (<<>>).
- 8 Save the letter when it is complete. To do this, on the **File** menu, click **Save As**.
- 9 Select a name and location to save the letter (or accept the default name and location) and click **Save**.
- 10 On the **File** menu, click **Close**. You must close the file so that when you re-open the file, the template wizard will reappear.

- 11 When you are ready to merge the customer information, open the custom letter file that you just saved.
- 12 Click **Generate Letters**. The **Custom Letter** window opens.
- 13 In the **Select Store** field, click the arrow and select a store name. The customers that are in that store's customer database will be printed. To select all stores, click **Select all locations**.
- 14 You can choose to type a number of top customers (customers with the highest sales volume) in the **Top Customer Option** field. For example, if you would only like to print the top 50 customers, type 50 in this field. You may leave this field blank.
- 15 In the **Date Range** field, select a sale date range, so that only customers who made purchases within the date range will be printed. To do this, click the down arrows in each of the **Start Date** and **End Date** fields to specify a start and end date for the date range.
- 16 If you want to specify a range of ZIP codes (for example "60501 to 60512"), type the beginning ZIP code in the **Start** field and the ending ZIP code in the **End** field and then click **Add**. The range is added to the text box below. You can then add more ZIP code ranges. You can also leave this information blank.

NOTE

To enter a specific ZIP code, type a zip code in the **Start** field and then click Add. You can then add additional zip codes this way.

- 17 If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See [Marketing Screen](#) on page 24–21 for information on setting up these categories.)
To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.
To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.
- 18 When you are finished selecting the options in this window, click **Finish**.
- 19 You are then asked Would you like to create mailing labels? Click **Yes** if you want to print mailing labels, otherwise click **No**. You can also see [Printing Mailing Labels](#) on page 15–6 if you want to print mailing labels at a later time.
- 20 To print the letters, on the **File** menu, click **Print**.

Printing Delinquency Letters

NOTE

This report should only be printed if you have the Billing upgrade module.

Sending delinquency letters to customers who need the reminder for payment helps you collect from those customers. FTD Mercury includes a gently-worded letter template to help you send a reminder.

TASK**To print delinquency letters:**

- 1 On the **Management** menu, click **Reports and Templates**.
- 2 Double-click the **Mercury Forms** folder.
- 3 Double-click the **Letters and Templates** folder.
- 4 Double-click on the **Delinquent Letter** icon to open the template.
- 5 When the **FTD Mercury - Delinquent Letter** window opens, click **Next**.

- 6 When the **Select Days Due** window opens, select the days past due for which you want to create letters. You may choose any combination of the 30, 60, 90, and/or 120 day periods listed. Then, click **Next**.
- 7 When the **Sender Information** window opens:
 - a. In the **Enter the sender's name** field, enter the name of the employee who is sending this letter.
 - b. Click the arrow in the **Select a Store** field and choose the store from which the letter will be sent.
 - c. Click **Next**.
- 8 Review the information you have just entered in the **Finish** window. If you need to change any information, you may click the **Back** button to go back to any previous screen(s) and change information. If the information is correct, click **Finish**.
- 9 At Would you like to create mailing labels?, click **Yes** to create matching labels for letter recipients, or click **No** to print the letters only. If you chose No, skip to step 14 below.
- 10 When the **Labels** document opens displaying the completed labels, load your Avery 8160 Standard labels and select **File, Print**.
- 11 When the label printing is complete, select **File, Close**. When prompted, indicate if you want to save the document.
- 12 When the **Form Letters** document reappears, load the paper in the printer and select **File, Print**.
- 13 When the letter printing is complete, select **File, Close**. When prompted, indicate if you want to save the document.

Delinquency Letter

October 1, 2001

John Smith
123 Main Street
Lisle, IL 60532

Dear John Smith:

Our records indicate that your account with us is now more than 60 days past due. According to our records, the total unpaid amount as of the date of this letter is \$64.48. Total past due is \$64.48.

We value your business and want to continue to provide you with quality products and timely service. However, good business practices require us to insist on payment of your balance due today.

If our records are incorrect, please contact our shop immediately. If you want an itemized list of the products and services provided to you, we would be more than happy to provide you with that information.

Your prompt attention to this matter will be greatly appreciated.

Regards,
Leslie's Flowers and Gifts

P. S. Invoices 90 days past due are sent to a credit collection agency, which may affect your good credit standing. Please don't delay in sending in your payment today!

Modifying Letter Templates

Marketing letters have been created for you so that you can merge customer information into the letter and have custom letters printed to send to your customers. However, you may want to customize the letters by changing the wording on the letters BEFORE you merge customer information. This way the letter appears exactly as you want, and you will not have to manually change the letters before printing.

You can modify all of the following letters:

- » [Florist Thank You Letter](#) on page 15-4
- » [Recipient Discount Letter](#) on page 15-5
- » [Delinquency Letter](#) on page 15-12
- » [Occasion Code Letter](#) on page 15-9
- » [Creating Customer Letters](#) on page 15-10

TASK To change a marketing letter template before you merge FTD Mercury data into the letter:

- 1 On the **Windows Start** menu, point to **All Programs**, point to **Microsoft Office**, and select **Microsoft Word**. Microsoft Word opens.
- 2 On the **File** menu, click **Open**. The **Open** window appears.
- 3 From the **Files of type** list at the bottom of the window, select **Document Templates**.
- 4 On the left side of the window, click **Desktop**.
- 5 Click **My Computer, Local Disk, Wings, Office Templates, Mercury Forms**.
- 6 Select the template you want to change and click **Open**.

- NOTE** If you selected to edit the Customer Letter template, a popup window displays asking you if you wish to edit the letter or generate letters. Click **Edit Letter**.
- 7 Edit the letter as you wish. Be careful not to change the fields that are marked with brackets (<< >>).
 - 8 When you are finished editing the letter, on the **File** menu, click **Save As**.
 - 9 Type a unique file name in the **File** name text box in the **Save As** window (for example CustomerLetterMarch2003). Make sure that you type a unique file name. If you do not type a unique file name then you will replace the original file.
 - 10 Click **Save**.
 - 11 Exit out of Microsoft Word. To do this, on the **File** menu, click **Exit**.
 - 12 Open Microsoft Word again. On the **Windows Start** menu, point to **All Programs**, point to **Microsoft Office**, and select **Microsoft Word**. Microsoft Word opens.
 - 13 Click **General Templates** in the **New Workbook** on the right side of the screen (if you do not see the **New Workbook** on the right side of the screen, click the **File** menu then click **New** to display it).
 - 14 Click the **Mercury Forms** tab.
 - 15 Double-click on the name of your new custom letter that you just created.

NOTE If you are opening a Customer Letter template, a popup window displays asking you if you wish to edit the letter or generate letters. Click **Generate Letters**.

At this point the wizard appears and you should complete the wizard as you would normally. The data will merge into your new letters. Then save or print the letters as desired.

Marketing Categories

The Marketing screen in Mercury Administration allows you to set up marketing categories for 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 can create custom categories that will help you in your marketing efforts.

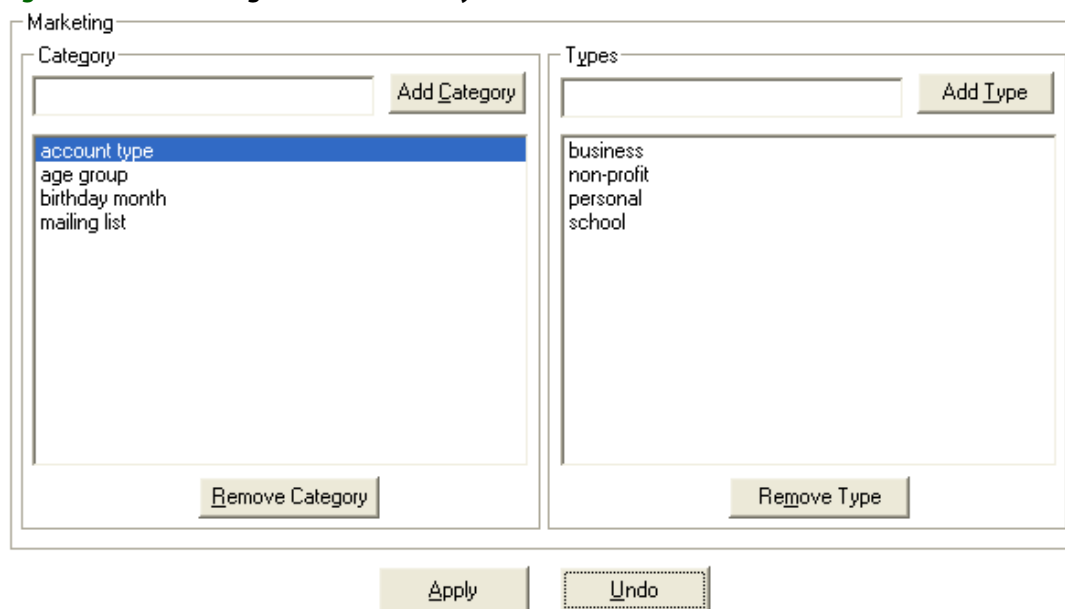
You have the opportunity to specify certain marketing categories when printing mailing labels, occasion code letters, and all types of customer lists. This way you do not have to print customer information for all customers; you can specify customers that only fall into certain marketing categories.

Marketing categories are set up in Mercury Administration. You assign the categories to your customers in the Marketing tab of the Customer Detail Information window.

TASK To set up marketing categories:

- 1 Access **Mercury Administration** by using one of the following methods:
 - » If you are already logged into FTD Mercury, on the **Tools** menu, click **Mercury Admin**.
 - » If you are not logged into FTD Mercury, double-click the **Mercury Administration** icon on your computer's desktop. Type your login name and password and then click **Login**.
- 2 Double-click on the **Accounting** folder on the right hand side of the window.
- 3 Double-click **Marketing**.

Figure 15-4: Marketing Screen in Mercury Administration



- 4 Type a category in the text box under the word **Category**. Some examples of categories are account type, birthday month, mailing list, age group, etc. After typing a category in the text box, click **Add Category**.
- 5 With the category highlighted in the text box on the left, type the first marketing type for that category under the word **Types** (on the right). For example, if the category is "account type," some related marketing types may be Business, Personal, Non-profit, School, and Other. Type the first marketing type and then click **Add Type**. Then type another marketing type for this category and click **Add Type** again, until all marketing types are added to the list.

- 6 At this point you can add another category in the **Category** field, and add types for that category. Notice that when you highlight a category in the list of categories, the types for that category display on the right in the list of types. Make sure that when adding/removing types, you have the correct **Category** highlighted.
- 7 When you are finished adding categories/types, click the **Apply** button.

Assigning Marketing Categories to Customers

To see the categories and types that you created, log into FTD Mercury and perform a Customer Search to bring up a customer (on the FTD Mercury Main Menu, in the Search area, click Customer). Once you have located the customer, click the Marketing tab to see the marketing categories:

Figure 15-5: Customer Detail Information Window – Marketing Tab

Category	Type
Account Type	Church
Mailer	
Promo	Business
Source	Church
	Individual
	Municipal
	Other
	School
	Synagogue

User Questions	Answer
How did you hear about our store?	
Would you like to be on our mailing list?	

Buttons: Save, Print, Previous, Next, Delete, Escape, Batch Mode

From this tab you can select category types for the customer.

TASK To select a category type in the Marketing tab:

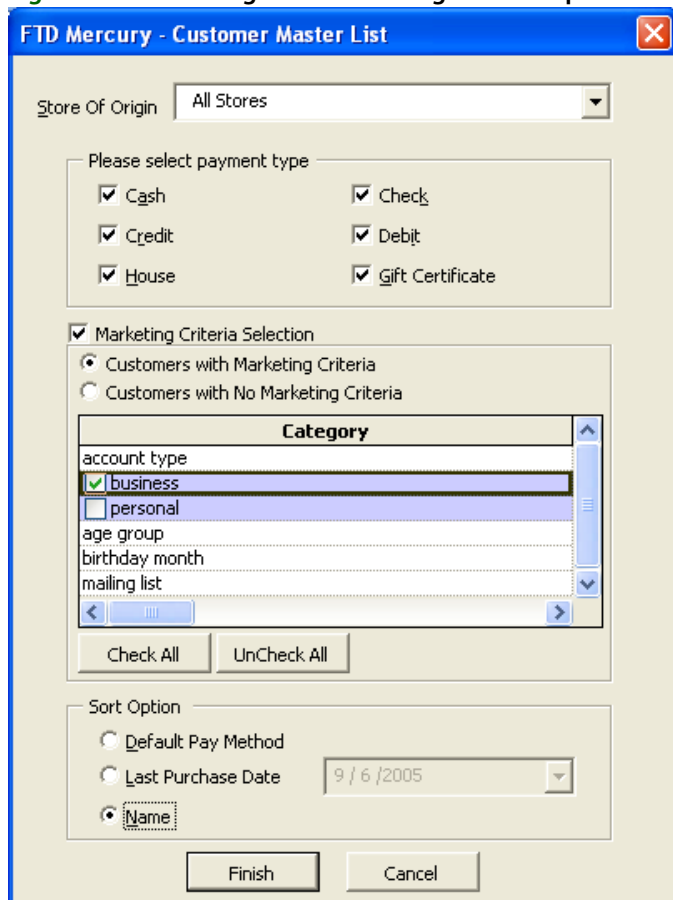
- 1 Click in the **Type** column for the category so a menu appears.
- 2 Select the category.
- 3 When you are finished selecting categories for the customer, click **Save**.

In the example above, the user is setting the “mailing list” to “yes” for this customer, so that when she wants to send out a mailing, she can create letters and labels for only those customers that want to be on the mailing list.

Using Customer Categories in Reports

Marketing categories are especially useful when printing reports. Some FTD Mercury reports allow you to print customer information by marketing category. For example, if you want to print a customer list of only your Business accounts, you could do so in the Customer Master List report by specifying that you want to print Business accounts in the Marketing Criteria Selection area of the screen (the report window displayed below is for the Customer Master List):

Figure 15-6: Selecting Customer Categories in Reports



In this example, the florist set up a marketing category of “Account Type” and set up the following account types: Business and Personal. By maintaining the account types, the florist is able to print reports based on account types. In this example only Business accounts are selected to print.

If you would not like to filter customers by marketing information, leave the Marketing Criteria Selection option unchecked. Marketing information will not be considered when printing the report.

To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.

The following reports and letters allow you to print by marketing category (to learn how to access the reports and for step-by-step instructions, see [Business Reports](#) on page 19-1 and [Marketing Letters](#) on page 15-3:

- » Customer Master List
- » Abbreviated Customer Master List
- » Customer Letter
- » Occasion Code Letter
- » Mailing Labels

The marketing information that you selected for the report prints at the top of the report. The Customer Master List is the only the report that prints each customer’s marketing selections.

Mercury Marketing Module

The Mercury Marketing module allows you to send direct mail and email marketing promotions to your customers. With the upgrade to Mercury Marketing, you can create custom marketing campaigns that target a specific set of customers, and use the campaigns to send email messages, letters, or postcards to the customers that you already have saved in your FTD Mercury customer database.

IMPORTANT If you have yet to purchase the Mercury Marketing module, contact Mercury Technology Sales at 1-800-767-3222 to learn more about how it can help your marketing efforts!

To automate the marketing process, FTD has provided you with dozens of colorful, professionally-designed Microsoft Word templates for all occasions, which can be customized to suit your needs. You can even create your own custom templates. When your campaign is created, your customer information is merged into the templates, and you can print the templates on your own printer, or send them to a printer to be printed.

If you plan to send email promotions, FTD has partnered with Constant Contact®, a company that maintains an email marketing Web site that is exclusive to FTD florists. Email marketing works by first creating your campaign in the Mercury Marketing application, then uploading your customer list to the Constant Contact Web site. On the Web site you select the template you want to use, schedule when you want the email messages to be sent, and then Constant Contact handles the email distribution. Constant Contact keeps all of your customer information confidential, and does not use it for any other purpose than for sending your marketing email messages.

NOTE Email marketing distribution is an add-on to the Mercury Marketing module, and is billed separately by Constant Contact. You must begin by registering with Constant Contact at <http://ftd.constantcontact.com>. Constant Contact manages opt in and opt out and adheres to permission-based marketing. Neither Constant Contact or the Mercury Marketing module allows you to send promotions to purchased lists of customers. You may only send promotions to customers that you have a relationship with (customers that are within your database).

Launching the Mercury Marketing Module

TASK To launch the Mercury Marketing module:

- 1 Open FTD Mercury.
- 2 Log in using a login name and password that has permission to use Mercury Marketing.
- 3 On the **FTD Mercury Main Menu**, click **Marketing**. The Mercury Marketing Wizard opens, and you can begin creating a new campaign or analyzing a campaign you have already executed.

Marketing Campaigns

Marketing campaigns are promotional campaigns used to send marketing materials to a targeted list of customers for a particular occasion or purpose. For example, you can create a Mother's Day letter for top customers, a birthday reminder postcard for all customers, or an Easter email promotion for new customers. By prompting you for specific information, the Mercury Marketing Wizard can help you create custom marketing campaigns using the data from your FTD Mercury customer database. You can then save these campaigns to reuse, edit, analyze, or schedule later.

To make the campaign creation process easy, the Mercury Marketing Wizard provides you with predefined campaigns that, when generated, use the marketing templates that FTD has created for you. Throughout the campaign creation process you can deviate from the defaults, in which case you will be creating your own custom campaign or creating a new marketing template. Below is a list of the predefined campaigns that you can create. Templates are located on your hard drive in the C:\Windows\Office Marketing Templates directory. You may want to browse this directory and open some of the templates to see which ones you might want to use.

Table 16-1: Predefined Campaigns

Campaign Type	List	Template	Description	Letter or Postcard	
Holiday	All Customers Customers by ZIP Code New Customers Top Customers	Boss's Day	Reminder to customer for Boss' Day	Both	
		Christmas	Christmas/Seasons' Greetings letter	Both	
		Easter	Easter holiday letter	Both	
		Mother's Day	Mother's Day promotion/letter	Both	
		Rosh Hashanah	Rosh Hashanah letter	Both	
		Secretary's Day	Reminder for Secretary's Day	Both	
		Sweetest Day	Sweetest Day letter	Both	
		Thanksgiving	Thanksgiving Day holiday letter	Both	
		Valentine's Day	Valentine's Day letter	Both	
Reminder	Reminder	Anniversary	Anniversary reminder, personalized to name, recipient, occasion, and date.	Both	
		Birthday	Birthday reminder, personalized to name, recipient, occasion, and date.	Both	
		Special Occasion	Generic reminder, personalized to name, recipient, occasion, and date.	Both	
	Reminder—Holiday	Holiday reminder templates (Reminder templates are available for all holidays; Mother's Day, Easter, etc.)	Reminder to those customers who made purchases for recipients on a specific holiday last year.	Both	
Other	Sending florists	Sending florists	Thank you letter to sending florists	Letter only	
	Dormant Customer	Dormant Customer	To customers who haven't purchased in a while, personalized to name and last purchase date	Letter only	
	New Customers	New Customers	Welcome letter, targeted to new customers	Letter only	
	Recipients	Recipients	To recipients only	Letter only	
	Top Customers	Top Customers	Thank you letter to top customers/additional promotion	Letter only	
	All Customers Customers by Zip	Generic	Generic	Can include a custom message	Letter only
		Open House	Open House	Generic invitation to visit store.	Letter only
Seasonal		Seasonal	Promoting seasonal products	Letter only	

Creating Direct Mail Marketing Campaigns

Direct mail marketing campaigns are campaigns that you intend to mail to your customers in a letter or postcard format. Before you begin, decide your target audience, occasion/purpose, and template. Templates are located on your hard drive in the C: \Wings\Office Marketing Templates folder. You may want to browse this directory and open some of the templates to see which ones you might want to use.

Creating Direct Mail Marketing Campaigns Using Predefined Templates

Predefined campaigns are the quickest and easiest campaigns to generate. Most of the information is completed for you automatically. Predefined campaigns use existing templates that are already created for you with predefined merge fields. Therefore you cannot change the text of the template, unless you modify it (see [Creating a Single Postcard Template](#) on page 16–13) or create a new template (see [Creating a New Template](#) on page 16–11).

TASK To create a direct mail marketing campaign using a predefined template:

- 1 On the **FTD Mercury Main Menu**, click **Marketing**. The **Marketing Wizard** opens.
- 2 Click **Create a New Campaign**. The **Create Campaign** panel appears.
- 3 In the **Campaign Name** field, enter a name for your marketing campaign. Remember, this campaign can be used later, so make the name as specific as possible. For example, you might want to indicate if it is a postcard or letter, and whether the promotion is a reminder campaign or a generic one.
- 4 From the **Referral Code** list, select the referral code that you want to use for this campaign (or add a new one if you do not see one that you want to use). A referral code must be assigned to the campaign so that when the customer refers to the campaign, you can select the referral code in Order Entry or Point of Sale and later track how effective the campaign was.
- 5 Select **Direct Mail** as the **Distribution Type**.
- 6 From the **Campaign Type** list, select the type of campaign. Generally, you will use the **Holiday** or **Reminder** campaigns. Click **Next**.
- 7 The **Select Target List** panel opens. This panel allows you to select the target list of customers that you want to include in this mailing. Click **Select a predefined list**. This option allows you to select predefined customer lists, such as **All Customers**, **New Customers**, or **Top Customers**, or if this is a **Reminder** campaign, you are prompted for the occasion type (**Reminder** or **Reminder - Holiday**). Selecting a predefined list selects your output fields automatically. You will be prompted later in the wizard for some specific criteria, depending on the predefined list that you choose (for example, if you select **Top Customers**, you will later be prompted for the number of top customers). Click **Next**.
- 8 The **Key Criteria** panel opens. This panel allows you to select which criteria you want to use when selecting the customers to include in your marketing campaign. The options that display on this panel depend on which type of customer target list you selected. Provide the information that the program is prompting for, depending on the option that you chose in the Select Target List window.

Clicking **More Criteria** allows you to select more criteria for the customer merge.

NOTE

Keep these in mind:

- » If you are creating a reminder campaign, you most likely want to select dates for orders that were placed last year.
- » If you have multiple stores, remember to choose the store that contains the customer records that you want to extract. If you select the main store, the program does not extract duplicate customers if

you have customers saved at multiple stores. If you extract by Top Customers, the system extracts the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system eliminates duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 are actually extracted).

- 9 Click **Next**.
- 10 The **Output Fields** panel opens. Output fields are the merge fields that are inserted into your document. Since you are using a predefined list (**All Customers**, **New Customers**, etc.), the output fields are selected for you. If you want to include more output fields than what are displayed in this window, you can click **More Fields** and select additional fields. Click **Next**.
- 11 The **Preview and Edit List** panel opens. This panel allows you to preview the list of customers before you save and execute your campaign. Before reaching the final panel in the wizard, review the list and see if you want to remove any customers from the campaign. Any records that are highlighted are missing information.

NOTE

If you type information in the grid, only the information for this specific customer list is saved (the information only is saved in this particular .csv file and is not saved in your customer database).

- » To exclude a customer from the list, right-click on the customer record and then click **Delete Row**.
 - » To view the criteria that you selected throughout the wizard, click **View Criteria**.
 - » If you want to change the criteria, click the **Back** button to go back to previous panel and change your selections.
- 12 Click **Next**.
 - 13 On the **Save Campaign** panel, from the **Template** list, select the template you want to use. This should correspond to the holiday or reminder for which you are creating the campaign. If you want to see the template before merging, click **Preview**. You can change the text of the template by clicking the **Edit** button. Use this option only to change the text of the template.
 - 14 If you want to print post cards, select this option. Postcards are printed four to an 8.5-by-11-inch sheet of paper. You also will need to fill in the **Return Address** area if you create post cards.
 - 15 Select **Text Only** if you want to use a template that does not have any graphics. The letter is printed as formatted text only. This is useful if the paper you are printing on already has graphics.
 - 16 In the **Sender** field, type the name of the person signing the letter or postcard, for example the manager or owner of the store.
 - 17 Click **Generate Mailing Labels** if you want Microsoft Word to generate mailing labels. If you select this option, select **Three Across**.
 - 18 Depending on whether you plan on sending your mailing list to an external printing service or whether you are printing the letters or postcards yourself, you can select to open the output in Microsoft Word. FTD recommends that if you are using a printing service, you do not select this option, and just send the customer file (located in C: \Wi ngs\Customer Li sts) and the template (located in C: \Wi ngs\Offi ce Templ ates\Mercury Forms) to the printing service. Otherwise, select **Open in Word**.
 - 19 Select **Execute Campaign Now**.
 - 20 Click **Finish**. If you did not select **Open in Word**, your customer list saves as a .csv file in the C: \Wi ngs\Customer Li sts directory. The file name is the campaign name followed by the date and time that you saved the campaign.

If you selected **Open in Word**, you receive a message stating that the merge will take a few minutes. Click **OK**. If you are merging a large number of customers, this process takes a few minutes. You will not see a progress bar or any indication that the program is working. Please be patient until you receive a response from the program letting you know that the merge is

complete. When the program is finished with the merge you will receive the message Mail Merge Operation completed successfully. The application will now be closed. Click **OK** to complete the process and close Mercury Marketing. Your letters/postcards will display in Microsoft Word.

- 21 To save the letters/postcards, click the **File** menu, then click **Save**. FTD recommends saving the file in the C:\Wings\Marketing Lists directory, so that you can access the letters by clicking the **Find my Merged Documents and Mailing Labels** on the first panel of the Marketing Wizard. Type a name and select a location to save the file, then click **Save**.
- 22 To print the letters/postcards, in Microsoft Word, on the **File** menu, click **Print**.

Creating Direct Mail Marketing Campaigns Using Custom Templates

If you want to create a custom campaign (i.e., you are not using a predefined list of customers or a provided template), you must merge your customer information into Microsoft Word manually.

- » To learn how to create a new template (create a template from scratch, including letter text and merge fields), see [Creating a New Template](#) on page 16–11.
- » To learn how to change an existing template (start with an FTD-provided template, then change the text and/or merge fields), see [Creating a Single Postcard Template](#) on page 16–13.

Creating a Birthday Reminder Direct Mail Campaign

TASK To create a birthday reminder direct mail campaign:

- 1 Launch the Mercury Marketing module.
- 2 On the **Welcome** panel, click **Create a New Campaign**.
- 3 In the **Campaign Name** field, type a name for the campaign (such as **Birthday Reminder**).
- 4 Select a referral code for the campaign. If you do not see the referral code you want to use, click **Add New Referral Code** and add it.
- 5 Select **Direct Mail** as the **Distribution Type**.
- 6 From the **Campaign Type** list, select **Reminder**.
- 7 Click **Next**.
- 8 On the **Select Target List** panel, click **Select a predefined list**. Select **Reminder** from the predefined list options at the bottom of the panel.
- 9 Click **Next**.
- 10 On the **Key Criteria** panel, if you have multiple stores, select a store from the **Store** list.
- 11 From the **Occasion** list, select an occasion. In this case, select **Birthday**.
- 12 In the **Delivery Date** field, select a beginning and ending delivery date.
- 13 Click **Next**.
- 14 On the **Output Fields** panel, review the fields that will be included. Click **Next**.
- 15 On the **Preview and Edit Lists** panel, review the list contents. Click **Next**.
- 16 On the **Save Campaign** panel, in the **Template** field, select **Birthday**. If you want to send a postcard instead of a letter, click **Post Card**.
- 17 In the **Sender** field, type the name of your shop or the owner name.
- 18 Select **Generate Mailing Labels** if you want to generate labels.
- 19 Select **Open in Word**.
- 20 Select **Execute Campaign Now**.
- 21 Click **Finish**.

The Mercury Marketing Wizard will process your selections. In a few minutes, Microsoft Word will open and merge all the customer information into the template. When the merge has finished, you can print the letters (or postcards, if you selected Post Card), or save the file to provide to a printing service.

Creating a New Holiday Reminder Direct Mail Campaign

The Mercury Marketing module includes several predefined holiday reminder campaigns, including templates for letters and postcards. Available holidays include: Boss's Day, Christmas, Easter, Mother's Day, Rosh Hashanah, Secretary's Day, Sweetest Day, Thanksgiving, and Valentine's Day.

TASK To create a new reminder campaign for any of these holidays using the included templates:

- 1 Launch the Mercury Marketing module.
- 2 On the **Welcome** panel, click **Create a New Campaign**.
- 3 On the **Create Campaign** panel, in the **Campaign Name** field, enter your campaign name.
- 4 Select a referral code for the campaign (or add a new one if necessary).
- 5 Select **Direct Mail** as the **Distribution Type**.
- 6 From the **Campaign Type** list, select **Holiday**.
- 7 Click **Next**.
- 8 In the **Select Target List** panel, click **Select a predefined list**, and choose the list you want to use from the list at the bottom of the panel.
- 9 Click **Next**.
- 10 The options that display on the **Key Criteria** panel depend on the list you selected in the **Select Target List** panel. Provide the information requested and click **Next**.

- NOTE** If you have multiple stores, remember to choose the store that contains the customer records that you want to extract. If you select the main store, the program does not extract duplicate customers if you have customers saved at multiple stores. If you extract by Top Customers, the system extracts the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system eliminates duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 are actually extracted).
- 11 The **Output Fields** panel displays all of the output fields that are available for extraction. Output fields are the merge fields that will be inserted into your document. Click **Next**.
 - 12 The **Preview and Edit List** panel allows you to preview the list of customers before you save your campaign. Before reaching the final panel in the wizard, review the list and see if you want to remove any customers from the campaign. To do this, right-click on the customer record and then click **Delete Row**. Any records that are highlighted are missing information.

- NOTE** If you type information in the grid, the information is saved only in this specific customer list (the information is saved only in this particular .csv file and is not saved in your customer database).
- 13 Click **Next**.
 - 14 On the **Save Campaign** panel, from the **Template** list, select the template you want to use. This should correspond to the holiday for which you are creating the campaign. If you want to see the template before merging, click **Preview**. You can change the text of the template by clicking the **Edit** button. Use this option only to change the text of the template.
 - 15 If you want to print post cards, select this option. Postcards are printed four to an 8.5-by-11-inch sheet of paper. You also will need to fill in the **Return Address** area if you create post cards.
 - 16 Select **Text Only** if you want to use a template that does not have any graphics. The letter is printed as formatted text only. This is useful if the paper you are printing on already has graphics.

- 17 In the **Sender** field, type the name of the person signing the letter or postcard, for example the manager or owner of the store.
- 18 Click **Generate Mailing Labels** if you want Microsoft Word to generate mailing labels. If you select this option, select **Three Across**.
- 19 Depending on whether you plan on sending your mailing list to an external printing service or whether you are printing the letters or postcards yourself, you can select to open the output in Microsoft Word. FTD recommends that if you are using a printing service, you do not select this option, and just send the customer file (located in C: \Wi ngs\Customer Li sts) and the template (located in C: \Wi ngs\Offi ce Templ ates\Mercury Forms) to the printing service. Otherwise, select **Open in Word**.
- 20 Select **Execute Campaign Now**.
- 21 Click **Finish**. If you did not select **Open in Word**, your customer list saves as a .csv file in the C: \Wi ngs\Customer Li sts directory. The file name is the campaign name followed by the date and time that you saved the campaign.
If you selected **Open in Word**, you receive a message stating that the merge will take a few minutes. Click **OK**. If you are merging a large number of customers, this process takes a few minutes. You will not see a progress bar or any indication that the program is working. Please be patient until you receive a response from the program letting you know that the merge is complete. When the program is finished with the merge you will receive the message Mail Merge Operation completed successfully. The application will now be closed. Click **OK** to complete the process and close Mercury Marketing. Your letters/postcards will display in Microsoft Word.
- 22 To save the letters/postcards, click the **File** menu, then click **Save**. FTD recommends saving the file in the C: \Wi ngs\Marketin g Li sts directory, so that you can access the letters by clicking the **Find my Merged Documents and Mailing Labels** on the first panel of the Marketing Wizard. Type a name and select a location to save the file, then click **Save**.
- 23 To print the letters/postcards, in Microsoft Word, on the **File** menu, click **Print**.

Creating Other (Third-Party) Marketing Campaigns

If you want to send a mailing to a printing service to distribute for you, FTD recommends that you save and send your list (.csv file) of customers only, and not merged into Microsoft Word letters. If you merge the list into Microsoft Word letters, the file will be too large to email. Using the Other option in the Marketing Wizard allows you to save the .csv file without merging the information into Microsoft Word letters.

TASK To create a third-party marketing campaign:

- 1 Launch the Mercury Marketing wizard.
- 2 Click **Create a New Campaign**. The **Create Campaign** panel opens.
- 3 In the **Campaign Name** field, enter a name for your campaign.
- 4 In the **Referral Code** field, select the referral code for this campaign (or add a new one).
- 5 Select **Other** as the Distribution Type.
- 6 From the **Campaign Type** list, select the appropriate campaign type.
- 7 Click **Next**.
- 8 The **Select Target List** panel opens. On this panel, you select your customer target list. This determines the customers that will receive the direct mail promotion. You have several options:

- » **Select a predefined list**—allows you to select a predefined lists, with output fields determined automatically. You are prompted later in the wizard for specific criteria (depending on the list you choose).
- » **Build your own list**—allows you to create your own list of customers by specifying a list of criteria. Selecting this option prompts you if you want to build your own list **By Order** or **By Customer**. If you select **By Order**, you also have the option to select **All matching orders** or **Only one order per customer**. Selecting **Only one order per customer** ensures that, for example, if John Smith has placed three orders that meet your campaign criteria, his information is only extracted once (and therefore only one letter or postcard is printed for John Smith).
- » **Refresh list from a previous campaign**—allows you to use a target list from a previous campaign, but refresh it to use current information. Click **Select** to select the campaign that you want to use.
- » **Load a list from a previous campaign**—uses the exact list of customers from a previous campaign, without refreshing the list to bring it up to date. Click **Select** to select the campaign you want to use.

9 Click Next.

10 The **Key Criteria** panel opens. This panel allows you to select which criteria you want to use when selecting the customers to include in your marketing campaign. The options that display on this panel depend on which option that you selected in the previous panel.

If you selected **Build your own list** in the previous panel, the **Key Criteria** panel gives you the freedom to specify your own criteria. Select the criteria that you want to apply to the customer extraction by clicking on the criteria field, then typing in the key criteria.

If you selected **Select a predefined list** in the previous panel, provide the information that the program is prompting for in the **Key Criteria** panel, for example the number of top customers or a zip code range. You can click **More Criteria** to make your customer list more specific by selecting more criteria.

NOTE

If you have multiple stores, remember to choose the store that contains the customer records that you want to extract. If you select the main store, the program does not extract duplicate customers if you have customers saved at multiple stores. If you are extracting by Top Customers, the system extracts the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system eliminates duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 are actually extracted).

11 Click Next.

12 The **Output Fields** panel opens. This panel lists all of the output fields that are available for extraction. Output fields are the merge fields that will be inserted into your document. For example, if you want to include the customer's name and address information at the top of the letter, you will want to select the **Customer Name, Address, City, State, and Zip** fields.

If you selected **Build your own list** in the **Select Target List** panel, this panel lists all available output fields from which you can. Select an output field by clicking on the field so that a check mark appears in the check box.

If you selected **Select a predefined list** in the **Select Target List** panel, the wizard lists the predefined output fields for you. You can select more output fields by clicking the **More Fields** button.

13 Click Next.

14 The **Preview and Edit List** panel opens. This panel allows you to preview the list of customers before you save your campaign. Before reaching the final panel in the wizard, review the list

and see if you want to remove any customers from the campaign. Any records that are highlighted are missing information.

NOTE

If you type information in the grid, it only saves the information for this specific customer list (the information is only saved in this particular .csv file and is not saved in your customer database).

- » To exclude a customer from the list, right-click on the customer record and then click **Delete Row**.
- » To view the criteria that you selected throughout the wizard, click **View Criteria**.
- » If you want to change the criteria, click the **Back** button to go back to previous panels and change your selections.

15 Click **Next**. The **Save Campaign** panel opens.

16 If you want to execute the campaign now (create the .csv customer list), click **Execute Campaign Now**, or click **Schedule** to schedule the campaign. If you are scheduling the campaign, click **Create** to create the schedule (see [Scheduling Campaigns](#) on page 16-9 for details).

17 Click **Finish**. The campaign saves and you are returned to the Marketing Wizard main panel.

If you selected **Execute Campaign Now**, your customer list is saved as a .csv file on your hard drive of your server in the C: \Wizards\Customer Lists directory. The file name is the campaign name, followed by the date and time that you saved the campaign.

IMPORTANT

Customer lists (.csv files) should not be viewed in Microsoft Excel (the data may be sorted incorrectly when viewing in Excel).

If you scheduled the campaign, the merged letters are saved in the C: \Wizards\Marketing Lists directory automatically each time they are generated according to the campaign schedule.

18 The last step is to email or deliver the customer list to the third party distribution company. To email the customer list to the company, open your email inbox and attach the file from the C: \Wizards\Customer Lists directory.

Scheduling Campaigns

When you save a campaign, you have the option of generating the campaign immediately (saving the customer list and/or merging the data into letters), or scheduling the campaign. Creating a schedule for a campaign is ideal for campaigns that you intend to run on a regular basis, for example monthly anniversary or birthday reminder letters. By creating a schedule, you are giving the Mercury Marketing application the information it needs to generate the campaign automatically, without you having to access the program.

Before scheduling the campaign, you must first create the campaign in the Marketing Wizard, specifying the target customer information (see [Creating Direct Mail Marketing Campaigns](#) on page 16-3). Before saving the campaign, select **Schedule** in the **Save Campaign** window:

TASK

To create a campaign that will be generated on a schedule:

- 1** Create the campaign in the Mercury Marketing Wizard. Ensure you do not save the campaign in the last panel of the wizard.
- 2** Before saving the campaign, select **Schedule** in the **Save Campaign** panel. Click **Create** to create the campaign schedule. The Campaign Scheduler opens.
- 3** Specify the start and end dates for the campaign in the **Start Date** and **End Date** fields. This will be the period of time the campaign will be generated for you automatically.

- 4 Select if you want to run the campaign daily, weekly, monthly, or annually. You are selecting how often you want the campaign to be generated. For example, if you select **Monthly** for a date range of April 1 2006 to April 1 2007, a campaign will be generated for each month (12 campaigns will be generated).
- 5 If you want to be notified when a list is generated, select the **Notify me by E-mail after Generating the List** and enter your email address in the **E-mail** field. This email message will remind you to distribute the campaign.
- 6 In the **Date Range** section, click either **Fixed** or **Floating**. The **Fixed** option should be used for non-reminder campaigns that do not require a range of data to be used. For example, if you are sending out a yearly Mother's Day, Easter, Valentine's Day, etc., campaign, and if your campaign is not related to specific order data in your system, select the **Fixed** option.

The **Floating** option should be used for reminder campaigns, when the campaign requires a range of data (such as orders placed from April 1, 2005 to April 30, 2005). For example, if you are sending out a **Birthday** reminder template and you want to use order information from last year's orders, select the **Floating** option.
- 7 Click **Generate**. The **Campaign Scheduler** will list your campaign schedule. The **Starting** and **Ending** columns list the date range that will be used to extract order information. If you selected the **Fixed** option, the **Starting** and **Ending** columns will be blank.
- 8 Click **OK** to save the information and return to the **Save Campaign** panel in the Marketing Wizard.
- 9 On the **Save Campaign** panel, click **Finish**.

Campaign Analysis

The Mercury Marketing module allows you to analyze marketing campaigns so you can track sales generated by your campaigns. Sales that are entered with a marketing campaign's referral code in Order Entry or Point of Sale are sales that are tracked by the Campaign Analysis tool.

NOTE The Campaign Analysis tool only displays orders that were entered in FTD Mercury (Order Entry and Point of Sale). To analyze sales statistics for orders that were placed online, go to the Constant Contact Web site (<http://ftd.constantcontact.com>) and run a campaign analysis.

TASK To analyze a campaign:

- 1 Launch the Mercury Marketing Wizard.
- 2 On the **Welcome** panel, click **Analyze a Campaign**.
- 3 In the **Campaign Analysis** window, in the **Date Range** area, enter the date range in which the campaign was run.
- 4 Click **Refresh** to list the campaigns that meet the date range you selected.
- 5 From the results list, select the campaign for which you want to view results.
- 6 In the **Report By** area, select whether you want to view the **Summary Report** (which lists the total dollar amount and number of orders that were generated by the campaign) or the **Detail Report** (which lists each individual order that was generated by the campaign).
- 7 Click **View Results**. The Mercury Marketing Wizard will generate the report you selected.

Deleting Campaigns

You can delete campaigns from the Campaign Analysis window.

TASK To delete a campaign from the Campaign Analysis window:

- 1 Select the campaign from the list and click **Delete**. If you do not see the campaign in the list, you may have to change the criteria at the top of the panel and then click **Refresh**.
- 2 A message appears, warning you if you delete the selected campaign, it will delete other campaigns that were run with the same campaign name, including campaign schedules. Click **Yes** to delete the campaign or click **No** to return to the **Campaign Analysis** window.

Templates

FTD has provided you with dozens of templates to choose from for direct mail marketing (see the list of templates in [Marketing Campaigns](#) on page 16-2). These templates can be found in the C:\Wings\Office Marketing Templates directory.

Modifying an Existing Template

Modifying an existing template allows you to take advantage of the professional look of the predefined template, yet customize it to meet your needs.

This procedure teaches you how to change the merge fields in the template. If you want to only change the text in the template, you can do this by clicking the **Edit** button in the **Save Campaign** panel at the end of the Marketing Wizard.

TASK To change merge fields in a template:

- 1 Create a marketing campaign using the Marketing Wizard in the Mercury Marketing application. However, choose not to open the campaign in Microsoft Word (make sure **Open in Word** is not checked), or if the program asks you if you want to open a new Microsoft Word document to begin the merge, click **No** (you will open the existing template instead).
- 2 Open the template you want to change. To do this:
 - a. Open Windows Explorer by right-clicking on the **Windows Start** button and clicking **Explore**.
 - b. Navigate to the C:\Wings\Office Marketing Templates folder and locate your template:
 - c. Double-click on the template to open it.
- 3 Continue with step 2 in [Creating a New Template](#) on page 16-11. Changing the text or merge fields in the file as necessary. Make sure that before you merge the customer information into the document, save the template using the **Save As** command from the **File** menu (make sure that you are saving the document as a **Document Template**). It is suggested to save it with the other templates, in the C:\Wings\Office Marketing Templates directory.

If you want to change a predefined template permanently, save it using the same file name.

To reuse the template in the future, follow the procedure in this section again; however you will not change or rename the file as instructed in step 3 above.

Creating a New Template

Creating a new template from scratch gives you the freedom to create any type of template that you want. You can select your own merge fields, type a letter from scratch, then merge the customer information extracted from your FTD Mercury database.

Before creating the template, you must extract a customer list (.csv file) so you can merge the customer list into the custom template. See [Creating Direct Mail Marketing Campaigns Using Custom Templates](#) on page 16-5 to create your marketing campaign.

Your customer list was saved as a .csv file in the C: \Wings\Customer Lists directory on the server. This is the file that you need to import into Microsoft Word after you design your new template.

TASK To create a new template:

- 1 To begin, open Microsoft Word by clicking the **Windows Start** menu, pointing to **All Programs**, then clicking **Microsoft Word**. (Microsoft Word may be located in the Microsoft Office folder.)
- 2 In Microsoft Word, on the **Tools** menu, point to **Letters and Mailings**, and click **Mail Merge Wizard**.
- 3 At the bottom of the right pane, click **Next: Starting document**.
- 4 At the bottom of the right pane, click **Next: Select recipients**.
- 5 In the right pane, under **Use an existing list**, click **Browse**.
- 6 Navigate to the C: \Wings\Customer Lists folder on the server, highlight the .csv file (the customer list that was generated by the campaign in the Mercury Marketing Wizard), then click **Open**.
- 7 The list of mail merge recipients opens up. These are the customers that met the criteria that you specified for the campaign in the Mercury Marketing Wizard. Review the list of customers. If you want to remove a customer from the list, click on the check box next to the customer to remove the check mark. To help you review the list, you can click on the column headings to sort the information. Click **OK** when you are finished.
- 8 At the bottom of the right pane, click **Next: Write Your Letter**.
- 9 On the blank Microsoft Word document, type your template letter. To insert a merge field, first put your cursor in the letter where you want to insert the merge field, then click **More items** in the right pane. A window opens with the available merge fields.
- 10 To insert a merge field, first make sure that **Database Fields** is selected at the top of the window, then select the merge field and then click **Insert**. The merge fields display in your letter with brackets (<<>>).
- 11 If you want to insert graphics, do so now. If you have a graphic on file that you want to use (like your company logo or letterhead), import that graphic. (On the **Insert** menu, point to **Picture**, and click **From File**. Navigate to and select the graphic to import it in your document.)

TIP Microsoft Word comes with clip art that is already installed on your computer. If you want to browse through available clip art, on the **Insert** menu, point to **Picture**, and click **Clip Art**. The **Insert Clip Art** pane displays on the right side of the screen. Here you can browse through and select clip art to include in your template.

- 12 Spell check your template. To begin the spell check, on the **Tools** menu, click **Spelling and Grammar**.
- 13 When you are finished designing your template, at the bottom of the right pane, click **Next: Preview your letters**.
- 14 Page through your letters to make sure that the merge appears the way you want. To page through the letters, in the right pane, under **Preview your letter**, click the left and right arrows (<< and >>). If you want to make any changes to the template, at the bottom of the right pane, click the **Previous: Write your letter**.
- 15 When you are ready to merge the customer information, at the bottom of the right pane, click **Next: Complete**.
- 16 You have two options: **Print** and **Edit Individual Letters**. If you want to print the document now, click **Print**. If you want to edit individual letters before you print them, click **Edit Individual Letters**.
- 17 When the **Merge to New Document** window opens, select **All** then click **OK** to print all of the letters. Alternatively, you can just print the current document, or indicate a range of records to

print. The letters display in Microsoft Word, where you can page through them and make any necessary changes. When you are ready to print them, click **File**, then click **Print**.

- 18 Save the template. If you want to use the template again to reuse later, save the template as a Microsoft Word template. To do this:
 - a. On the **File** menu, click **Save**.
 - b. In the **Files of Type** field, make sure it reads **Document Template**.
 - c. Give the template a name in the **File name** field, select a location to save the file (it is suggested to save it with the other templates, in the C: \Wi ngs\Offi ce Marketi ng Templ ates directory), then click **Save**.

Creating a Single Postcard Template

The Mercury Marketing predefined postcard templates are formatted to print four postcards per sheet of paper. If you have postcard stock that is formatted for one postcard per sheet of paper, you will have to create a new template that is specially formatted to print on your postcard stock paper.

To do this, first extract a customer list (.csv file) so that you can merge the customer list into the custom postcard template. See [Creating Other \(Third-Party\) Marketing Campaigns](#) on page 16–7 to create your .csv file.

Next, follow the steps in [Creating a New Template](#) on page 16–11 to create your new template and insert your merge fields. However while you are writing your letter in Microsoft Word, format the margins of the document so that the template fits on your paper. This involves some trial and error. After creating your template, try printing it on your postcard stock paper to see if it is aligned correctly. You may have to make adjustments so that it prints correctly.

For help on formatting in Microsoft Word, consult your Microsoft Word documentation.

Email Marketing Campaigns

If you have not already considered marketing by email, here are a few reasons why it is more efficient and effective than traditional mail marketing—and why it can save you money:

- » **It is much less expensive**—no labor costs or expenses for paper, envelopes and stamps
- » **It saves time**—email marketing campaigns only take a couple of minutes to send, compared with the long process of printing, addressing, and mailing letters
- » **Templates are already created for you**—they are colorful, professional, and contain personalized customer information
- » **Email marketing generates an immediate response from your customers**—email messages can be received by your customers within minutes
- » **Campaign results are tracked instantly**—you can use the Constant Contact Web site to track how many customers have placed orders using links in your marketing email messages
- » **Establish and build relationships**—email marketing keeps you in touch with current and prospective customers and builds lasting relationships

Creating Email Campaigns in the Marketing Wizard

As you begin creating an email campaign, keep in mind that only customers with email addresses are extracted for the campaign.

TASK To create an email campaign using the Marketing Wizard:

- 1 On the **FTD Mercury Main Menu**, click **Marketing**. The **Marketing Wizard** opens.
- 2 Click **Create a New Campaign**.
- 3 On the **Create Campaign** panel, in the **Campaign Name** field, enter a campaign name. Remember that this campaign can be used later, so make the campaign name as specific as possible (for example, indicate that it is an email campaign).
- 4 In the **Referral Code** field, select the referral code that you want to give the campaign that you are creating. A referral code must be assigned to the campaign so that you can track sales that were generated by the campaign during campaign analysis.
If you do not see the referral code you want to use, click **Add New Referral Code**, type the new referral code and then click **Add**. The new referral code is available to use in the Marketing Wizard immediately, however you must restart FTD Mercury and Mercury Administration for the new referral code to display in those programs.
- 5 Select **Email** as the **Distribution Type**.
- 6 From the **Campaign Type** list, select the appropriate campaign type.
- 7 Click **Next**.
- 8 In the **Select Target List** panel, select the target list for your campaign. Your options are:
 - » **Select a predefined list**—This allows you to select a predefined list of either all your customers, new customers, top customers, or customers by ZIP code. Select the appropriate customer list from the box on this panel.
 - » **Refresh list from a previous campaign**—This allows you to use a target list of customers from a previously executed campaign, but it also refreshes the data to include any new or changed customers that meet the criteria for that campaign. Click **Select** to select the campaign from which the list will be refreshed.
 - » **Load a list from a previous campaign**—This loads an exact list of customers that was used in a previous campaign. Click **Select** to select the campaign from which the list will be loaded.
- 9 Click **Next**.
- 10 The options that display on the **Key Criteria** panel depend on the options selected in the **Select Target List** panel. Provide the information requested and click **Next**.

NOTE

- If you have multiple stores, remember to choose the store that contains the customer records that you want to extract. If you select the main store, the program does not extract duplicate customers if you have customers saved at multiple stores. If you extract by Top Customers, the system extracts the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system eliminates duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 are actually extracted).
- 11 The **Output Fields** panel displays all of the output fields that are available for extraction. Output fields are the merge fields that will be inserted into your document. Click **Next**.
 - 12 The **Preview and Edit List** panel allows you to preview the list of customers before you save your campaign. Before reaching the final panel in the wizard, review the list and see if you want to remove any customers from the campaign. Any records that are highlighted are missing information.

NOTE

- If you type information in the grid, the information is saved only in this specific customer list (the information is saved only in this particular .csv file and is not saved in your customer database).
- » To exclude a customer from the list, right-click on the customer record and then click **Delete Row**.
 - » To view the criteria that you selected throughout the wizard, click **View Criteria**.

- » If you want to change the criteria, click the **Back** button to go back to previous panels and change your selections.
- 13** Click **Next**. The **Save Campaign** panel opens.
- 14** Select **Generate Email List Now** to save the campaign and generate the .csv customer list now, and/or click **Schedule** to schedule the campaign. If you are scheduling the campaign, click **Create** to create the schedule (see [Scheduling Campaigns](#) on page 16–9 for details).
- 15** If you want to upload the customer file to the Constant Contact Web site now, select **Launch Constant Contact eMail Marketing Website** so that your browser can take you to the Constant Contact Web site.
- 16** Click **Finish**. The campaign saves and you are returned to the Marketing Wizard main panel. If you selected **Generate Email List Now**, your customer list is saved as a .csv file on your hard drive in the C: \Wings\Customer Lists directory. The file name is the campaign name followed by the date and time that you saved the campaign.

NOTE

Customer lists are only saved in the C: \Wings\Customer Lists directory on the server. If you are working on a client PC, you must retrieve the .csv on the server PC in that directory. Clicking the **Find my Previous Lists** link does not find the customer list on the client PC.

IMPORTANT

Customer lists (.csv files) should not be viewed in Microsoft Excel (the data may be sorted incorrectly when viewing in Excel).

If you Scheduled the campaign, the email messages are sent automatically according to the schedule that you specified.

- 17** The next step is to upload the customer file to the Constant Contact Web site. If you did not select **Launch Constant Contact eMail Marketing Website** to access the marketing Web site now, you will later have to go to the Constant Contact Web site at <http://ftd.constantcontact.com> to upload the file.

Executing Your Email Marketing Campaign on the Constant Contact Web Site

After creating an email marketing campaign within Mercury Marketing, you can upload the campaign to the Constant Contact Web site at <http://ftd.constantcontact.com> to execute your campaign.

Email marketing distribution is billed separately by Constant Contact, the company that maintains the email marketing Web site. FTD has partnered with Constant Contact to create a seamless email marketing Web site for you to use on your own. The Web site includes easy-to-use, professional marketing templates for you to use. You simply upload your marketing campaign (customer email list) to the Constant Contact marketing Web site, customize the templates, and create a sending schedule. The email messages are sent with the information you want to send, when you want to send it.

Constant Contact does not allow you to upload third-party customer lists (i.e., lists that you purchase). You may only upload lists of customers that you already have a relationship with (customers that reside in your database). New anti-spam laws are now in place with penalties. Constant Contact is at the forefront of these new laws.

Guidelines for Developing Email Campaign Messages

If you are using email marketing, here are a few things to consider before beginning.

Maximize Deliverability

- » Avoid SPAM trigger words like “discount” and “free” in your email text. These words are SPAM (junk mail) triggers and may be caught by some customers’ email filter programs that help avoid SPAM. Constant Contact will pre-screen your text and subject lines for trigger words and prompt you to change them. If you want to use these words, it is recommended to embed them into graphics.
- » Use subject lines that will capture attention.

Tips for Writing Content

Although Constant Contact will provide predefined templates on their site, keep these tips in mind if you decide to change any of the text. Also, please refer to Constant Contact Central (located upon registration on the Constant Contact Web site) for more tips and tricks for creating successful campaigns.

- » Be short and to the point. Remember email is the fastest growing marketing channel and consumer mailboxes are packed.
- » Make sure your message is about the customer and what you can do for them. It should be more “you” focused than “we” focused.
- » Keep the most important part of your message at the top. Avoid making the customer scroll down—they may not.
- » Before using personalization, take a realistic look at the integrity of the data you are using. Is it reliable? If you reference a previous purchase, are you referencing a full product name, or rather an abbreviation that will make little sense to your customer?
- » Consider customers who share email addresses. What if you reference a gift sent by the husband to someone his wife would object to, and they both read the email at the same home email address?
- » Use of personalization may not improve response across lists. You need to test it with different types of customers. If you decide to use personalization, have some targeted letter copy in addition to their personalized name.
- » People respond to incentives. Test some and incorporate the ones that work into your offers.

Creating a List of Customer Email Addresses

If you want to create a list of customers and their email addresses for other uses, you can do so using the Mercury Marketing Wizard.

TASK To create a list of customers and their email addresses:

- 1 Launch the **Mercury Marketing Wizard**.
- 2 On the **Welcome** panel, click **Create a new Campaign**.
- 3 On the **Create Campaign** panel, in the **Campaign Name** field, enter a name for the campaign.
- 4 From the **Referral Code** list, select a referral code to use for this campaign. Alternatively, click **Add New Referral Code** to create a new referral code to use.
- 5 For the **Distribution Type**, select **Direct Mail**. (This may seem counterintuitive, but it is the correct choice.)
- 6 From the **Campaign Type** list, select the appropriate campaign type.
- 7 Click **Next**.
- 8 On the **Select Target List** panel, select **Build Your Own List**, and then select **By Customer**.
- 9 Click **Next**.
- 10 On the **Key Criteria** panel, ensure all options are cleared and click **Next**.

- 11 On the **Output Fields** panel, select **Customer Name** and **Customer Email Address**. Ensure all other options are cleared.
- 12 Click **Next**.
- 13 On the **Preview and Edit List** panel, review the list of customers and their email addresses. If you want to remove a customer from this list, right-click on the customer and click **Delete Row**. When you are satisfied with the list, click **Next**.
- 14 On the **Save Campaign** panel, select **Execute Campaign Now**.
- 15 Click **Finish**.

You will receive a message informing you of the name and location of the file containing the customer names and email addresses, which you can open in Microsoft Excel. The files are typically stored in C: \Wings\Customer Lists\Customer Lists for Manual Merging.

Mercury Marketing Wizard Reference

The Mercury Marketing Wizard contains the following panels and windows:

- » [Welcome Panel](#)
- » [Create Campaign Panel](#)
- » [Select Target List Panel](#)
- » [Key Criteria Panel](#)
- » [Output Fields Panel](#)
- » [Preview and Edit List Panel](#)
- » [Save Campaign Panel](#)
- » [All Campaigns Window](#)
- » [Add New Referral Code Window](#)
- » [Campaign Analysis Window](#)
- » [All Criteria Window](#)
- » [Selected Criteria Window](#)
- » [Campaign Scheduler Window](#)

Welcome Panel

When you open the **Mercury Marketing** module, the **Marketing Wizard** opens. The first panel in the wizard gives you the option of creating a new campaign or analyzing a campaign you have already executed.

Figure 16-1: Welcome Panel



To create a new marketing campaign, click the **Create a new Campaign** button. The Marketing Wizard will take you through the campaign creation process. To analyze a campaign that you have already run, click **Analyze a Campaign**. You will then select the campaign that you would like to analyze, and the program will display a sales by referral code report to show you the sales that were generated by the campaign.

The links at the bottom of the panel allow you to jump to directories on your computer where you have saved customer lists and merged marketing letters.

The **Find my Previous Lists** link takes you to the C:\Wings\Customer Lists directory on your computer. This is where your customer lists (.csv files) are saved by default. Customer lists are generated when you create marketing campaigns.

NOTE

Customer lists are only saved in the C:\Wings\Customer Lists directory on the server. If you are working on a client PC, you must retrieve the .csv on the server PC in that directory. Clicking the **Find my Previous Lists** link will not find the customer list on the client PC.

The **Find my Merged Documents and Mailing Labels** link takes you to the C:\Wings\Marketing Lists directory on your computer. This directory is where merged and scheduled marketing campaigns are saved by default.

The **Find my Pre-Built Templates** link opens the C:\Wings\Office Marketing Templates directory on your computer. This directory is where you can find your FTD-provided marketing templates (*.dot files).

Create Campaign Panel

The **Create Campaign** panel allows you to enter the name of the new campaign and a unique referral code, set the distribution type, and specify the campaign type. You can also load a previous campaign to refresh and run it again.

Figure 16-2: Create Campaign Panel

You can configure the following settings:

Table 16-2: Create Campaign Panel Settings

Setting	Description
Campaign Name	<p>Enter a unique name for this campaign. This should be easily understandable, for example “Mothers Day Email” for a Mother’s Day promotional email message. Remember that this campaign can be used later, so make the campaign name as specific as possible (for example, indicate that it is an email or direct mail campaign).</p> <p>If you click Load Previous Campaign, the All Campaigns window opens, allowing you to select an existing campaign to load.</p>
Referral Code	<p>Select a referral code you will use to differentiate this campaign when customers act on it. This will help you determine the campaign’s effectiveness. The Referral Code list has several predefined codes.</p> <p>If you click Add New Referral Code, you can enter a new code to ensure that you can determine the impact of this campaign. The new referral code will be available to use in the Marketing Wizard immediately, however you must restart FTD Mercury and Mercury Administration for the new referral code to display in those programs.</p>

Table 16-2: Create Campaign Panel Settings (cont.)

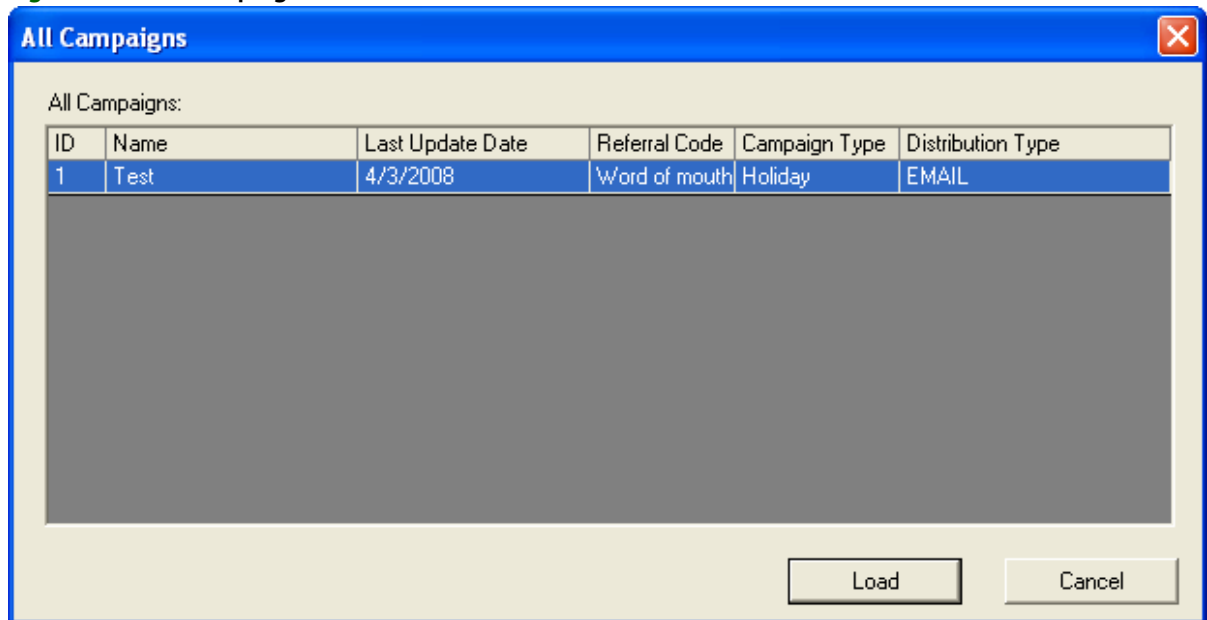
Setting	Description
Distribution Type	<p>Select one of the following distribution types:</p> <ul style="list-style-type: none"> » Email—Select this option if your marketing campaign will use email messages as the distribution method. Email campaigns are quicker and less expensive than traditional direct mail campaigns, but you need to collect customer email addresses so you can send your message to your customers. » Direct Mail—Use for physical mail campaigns. » Other—Select this option if you plan to send the customer list or merged letters to a third party company for distribution. <p>NOTE: If you are creating an email campaign, only customers with email addresses will be extracted for your marketing email messages.</p>
Campaign Type	<p>Select the campaign type from this list. You can select from the following:</p> <ul style="list-style-type: none"> » Holiday » Reminder » Other

Click **Next** to proceed to the **Select Target List** panel. Click **Back** to return to the **Welcome** panel.

All Campaigns Window

This window displays all past campaigns that you have run. To load a campaign, highlight the campaign in the list and then click **Load**.

Figure 16-3: All Campaigns Window



Add New Referral Code Window

The **Add New Referral Code** window allows you to enter a new referral code for a marketing campaign. This code is used to analyze the effectiveness of a particular marketing campaign, and therefore, should be unique. Typically, it should also be short so it can be seen in the Order Entry and Point of Sale windows.

Type the new referral code in the text field then click **Add**. You will receive a warning message stating that you will have to restart the FTD Mercury and Mercury Administration programs for the referral code to be visible in those programs. Click **OK** to accept the message.

Figure 16-4: Add New Referral Code Window

Campaign Analysis Window

So that you can track sales generated by marketing campaigns, the Mercury Marketing application allows you analyze marketing campaigns that you have run from the marketing wizard. Sales that are entered with a marketing campaign's referral code in Order Entry or Point of Sale are sales that are tracked in the **Campaign Analysis** window.

Figure 16-5: Campaign Analysis Window

Referral Code	Campaign Name	Execution Date and Time	Status	No of Orders	Distribution Type

NOTE

The Campaign Analysis tool only displays orders that were entered in FTD Mercury (Order Entry and Point of Sale). To analyze sales statistics for orders that were placed online, go to the Constant Contact website (www.constantcontact.com) and run a campaign analysis.

Complete the following fields on this window:

- » **Date Range**—Select a date range that the campaigns were run.
- » **Report By**—Indicate if you would like to view the Summary Report or the Detailed Report. The Summary Report lists the total dollar amount and number of orders that were generated by the campaign. The Detailed Report lists each individual order that was generated by the campaign.

Click **Refresh** to list the campaigns that meet the criteria you selected at the top of the window. To view campaign results for a campaign, highlight that campaign and then click **View Results**. Your report will display in Microsoft Word.

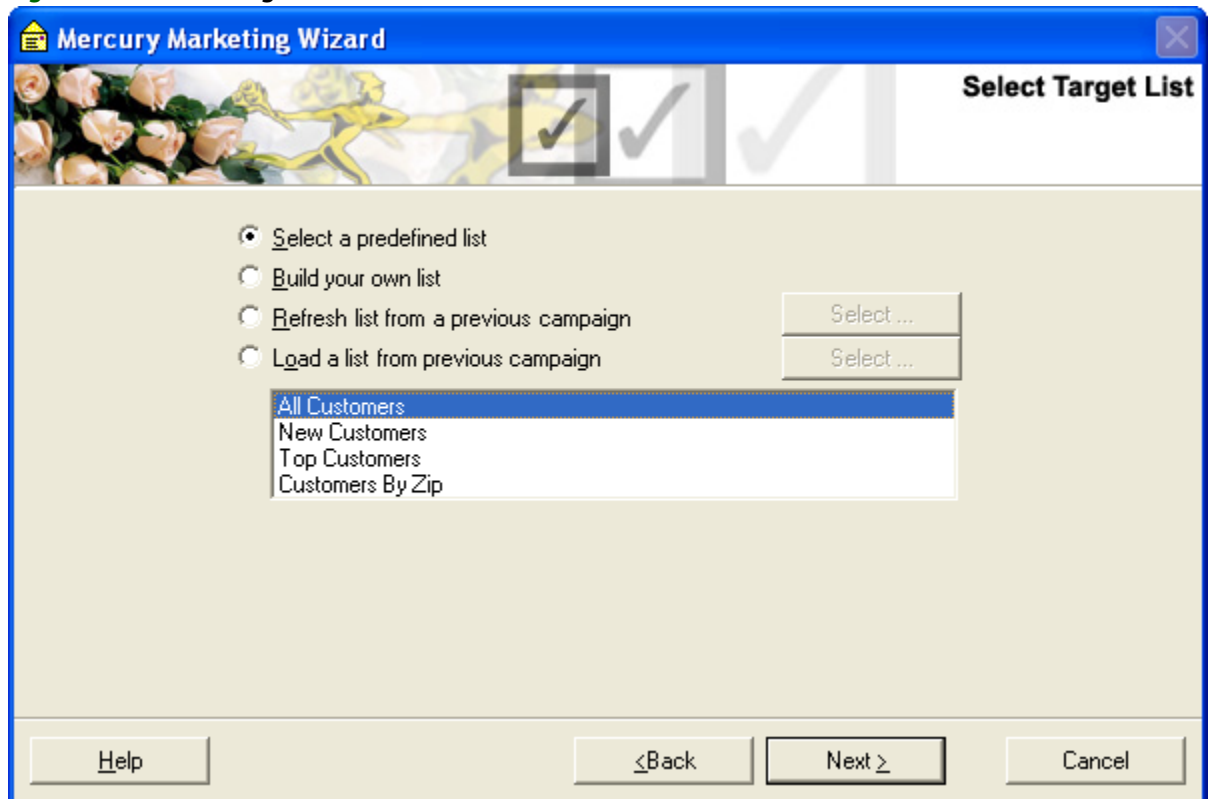
Deleting Campaigns

You can delete campaigns in the **Campaign Analysis** window. To delete a campaign, highlight the campaign in the list and then click **Delete** (if you do not see the campaign in the list, you may have to change the criteria at the top of the window and then click **Refresh**). If you delete a campaign, it will delete other campaigns that were run with the same campaign name, including campaign schedules. Click **Yes** to delete the campaign or click **No** to return to the **Campaign Analysis** window.

Select Target List Panel

The **Select Target List** panel allows you to specify the target audience for the marketing campaign.

Figure 16-6: Select Target List Panel



You can select from the following options for your target list:

Table 16-3: Set Target List Panel Settings

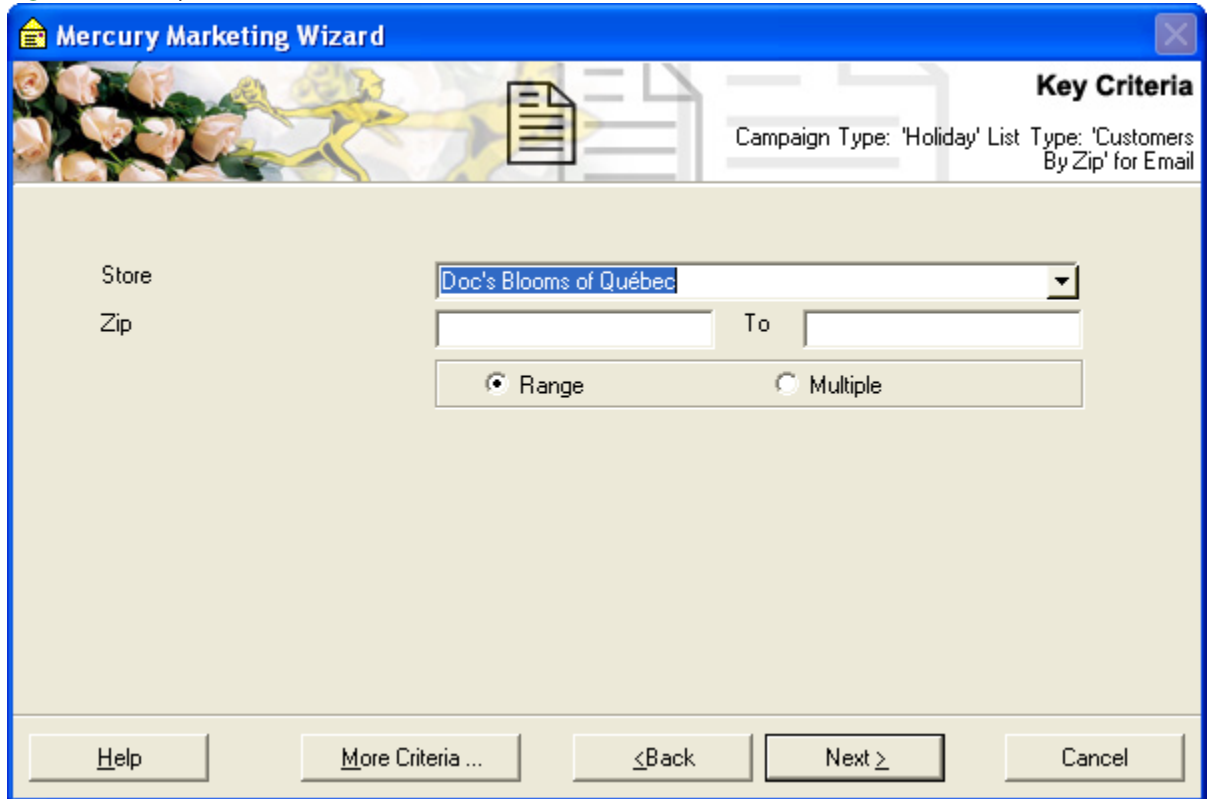
Setting	Description
Select a predefined list	This option allows you to select a predefined customer list, such as All Customers , New Customers , or Top Customers . If you select one of these options, later you will be prompted for more specific information, for example the number of top customers or a range of ZIP codes.
Build your own list	<p>This option allows you to create your own list of customers by specifying a list of criteria. Selecting this option will then prompt you if you would like to build your own list By Order (in the next panel you will select ORDER fields to extract by, such as Delivery Date and Occasion) or By Customer (in the next panel you will select CUSTOMER fields to extract by, such as Customer Number and ZIP Code).</p> <p>If you select By Order, you will also have the option to select All matching orders or Only one order per customer. Selecting Only one order per customer ensures that for example, if John Smith has placed three orders that meet your campaign criteria, his information will only be extracted once (and therefore only one email will be printed for John Smith).</p>
Refresh list from a previous campaign	<p>This option allows you to select a target list of customers from a previous campaign and refresh it to take into account any changed data (such as new customers or changed customer information) since the list was originally generated.</p> <p>If you select this option, click Select to display the All Campaigns window, from which you can select a previous campaign target list to refresh.</p>
Load a list from previous campaign	<p>This option allows you to target a list that you have already targeted. The list will be exact; it will not be refreshed if the criteria for creating the original list has changed. If new orders or customers were saved since the extraction of the previous campaign, these orders/customers will NOT be added to your customer list.</p> <p>If you select this option, click Select to display the All Campaigns window, from which you can select a previous campaign target list to load.</p>

Click **Next** when you are finished with this panel to move to the next panel of the wizard.

Key Criteria Panel

The **Key Criteria** panel allows you to select the criteria you want to use when selecting the customers to include in your campaign. The options on this panel depend on the options you selected in the **Select Target List** panel.

Figure 16-7: Key Criteria Panel



If you selected **Build your own list** in the **Select Target List** panel, the **Key Criteria** panel gives you the freedom to specify your own criteria. Select the criteria that you would like to apply to the customer extraction by clicking on the criteria field, then typing in the key criteria.

Figure 16-8: Key Criteria Panel for Build Your Own List

Mercury Marketing Wizard

Key Criteria

Campaign Type: 'Holiday' List Type: 'By Customer' for DirectMail

Store

Customer #

Billing Cycle

Alphabetical Sort

City

State

Zip

Country

To

To

To

Range Multiple

Help <Back Next > Cancel

If you selected **Select a predefined list** in the **Select Target List** panel, provide the information that the program is prompting for in the **Key Criteria** panel, for example the number of top customers or the ZIP code range. You can click the **More Criteria** button to select more criteria, if you would like your customer list to be more specific.

NOTE

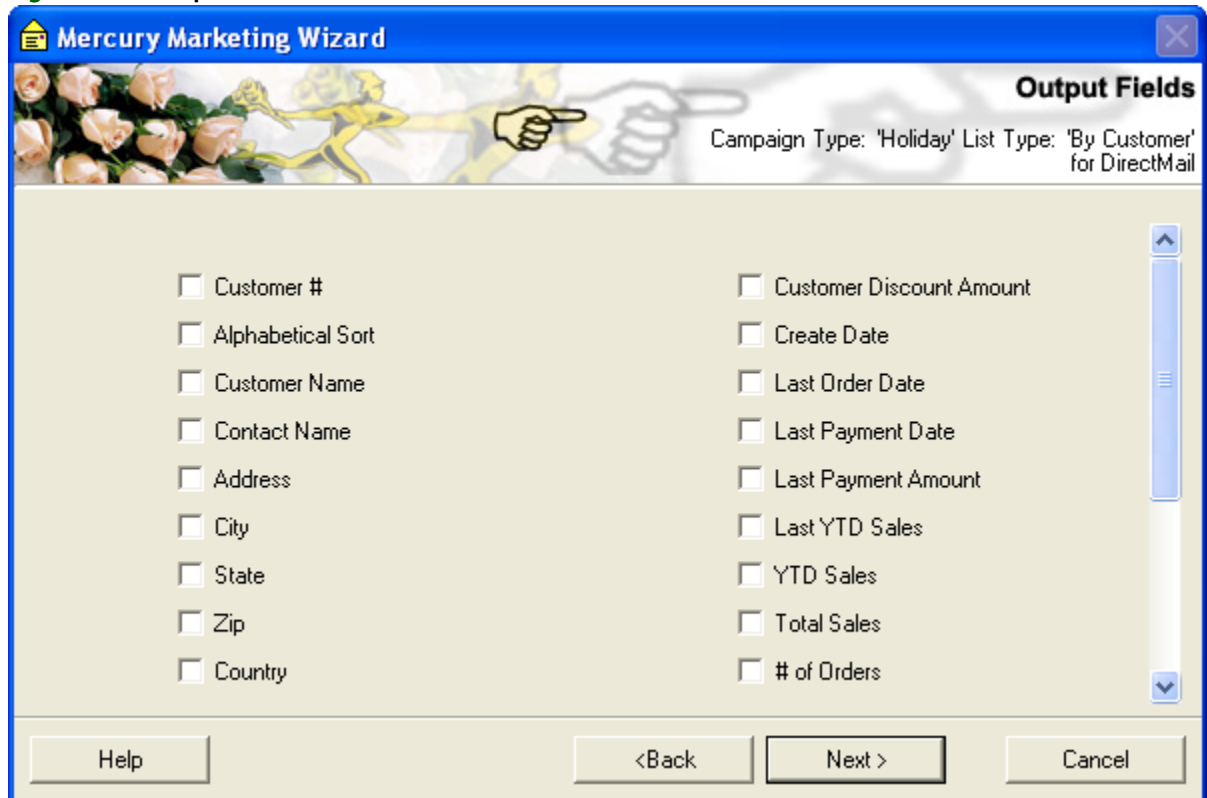
If you have multiple stores, remember to choose the store that contains the customer records that you would like to extract. If you select the main store, the program will not extract duplicate customers if you have customers saved at multiple stores. If you are extracting by Top Customers, the system will extract the top number of customers at the selected stores. However because the system is designed to eliminate duplicate records, the system will eliminate duplicate top customers if the extracted customers are top customers at more than one store (therefore you may select to extract 100 top customers, but because duplicates are eliminated, only 50 will actually be extracted).

Click **Next** when you are finished with this panel to move to the next panel of the wizard.

Output Fields Panel

The **Output Fields** panel lists all of the output fields that are available for extraction. Output fields are the merge fields that you will insert into your template or email. For example, if you want to include the customer's name and address information at the top of a letter, you will want to select the Customer Name, Address, City, State, and Zip fields. If you are creating an email campaign, you must select an email address for either the customer or recipient (this information must be extracted so the email can be sent). You will be warned if an email address is not selected.

Figure 16-9: Output Fields Panel



If you selected **Build your own list** in the **Select Target List** panel, this panel will list all available output fields for you to select from. Select an output field by clicking on the field so that a check mark appears in the check box.

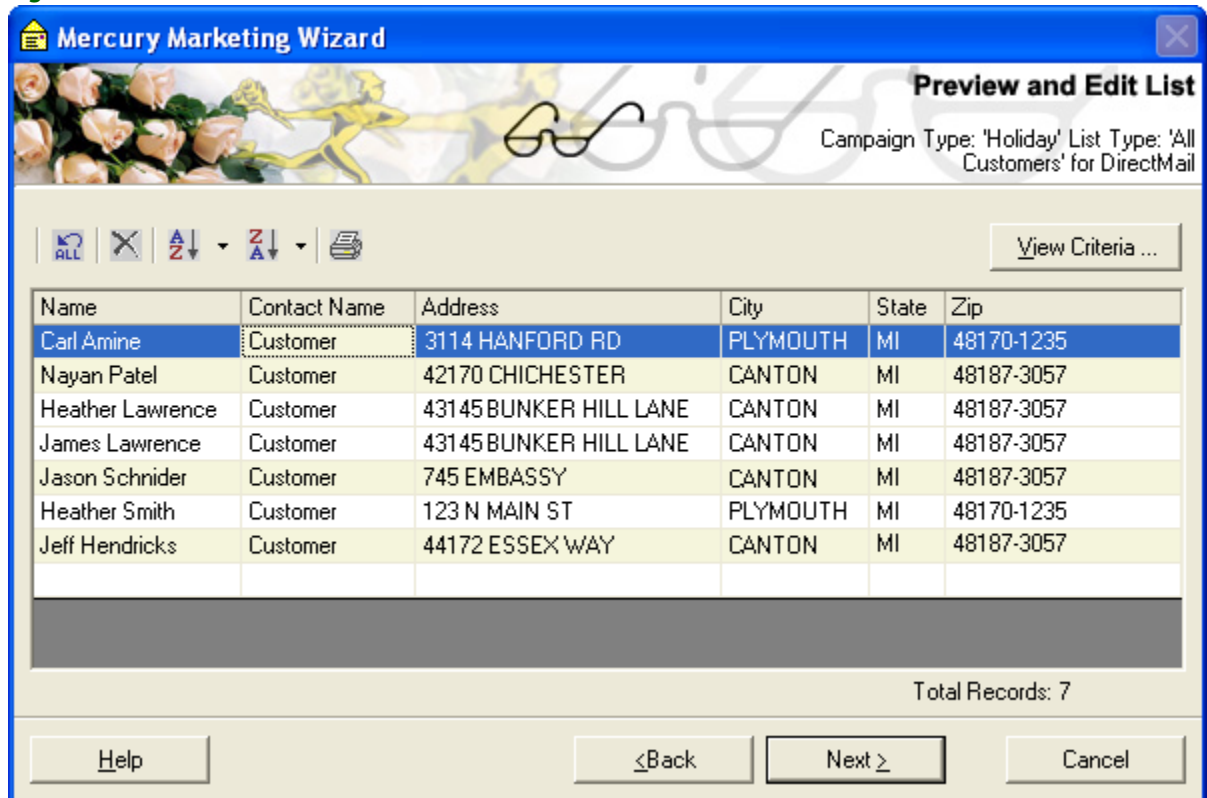
If you selected **Select a predefined list** in the **Select Target List** panel, the wizard will list the predefined output fields for you. You can select more output fields by clicking the **More Fields** button. However, if you do add additional fields, you will deviate from the predefined campaign to the point where your campaign is actually a custom campaign. You will then have to use Microsoft Word to manually merge fields before you save your campaign.

If you click **More Fields**, you can select fields to include from the **All Output Fields** window. Click **Back** to return to the **Key Criteria** panel; click **Next** to proceed to the **Preview and Edit List** panel.

Preview and Edit List Panel

The **Preview and Edit List** panel allows you to see the target list before you save the campaign. You should take this opportunity to verify the list is what you expected. It is possible that you will need to click the **Back** button to change some of the previous options. If you are not sure of the criteria, click **View Criteria** to display the **Selected Criteria** window.

Figure 16-10: Preview and Edit List Panel



FTD Mercury automatically highlights entries in the list that may have problems (such as incomplete data). You can either fill in or change the data, or you can right-click the row and delete the entry entirely. If you elect to modify an entry, it will only be changed for this mailing list and not in the customer record.

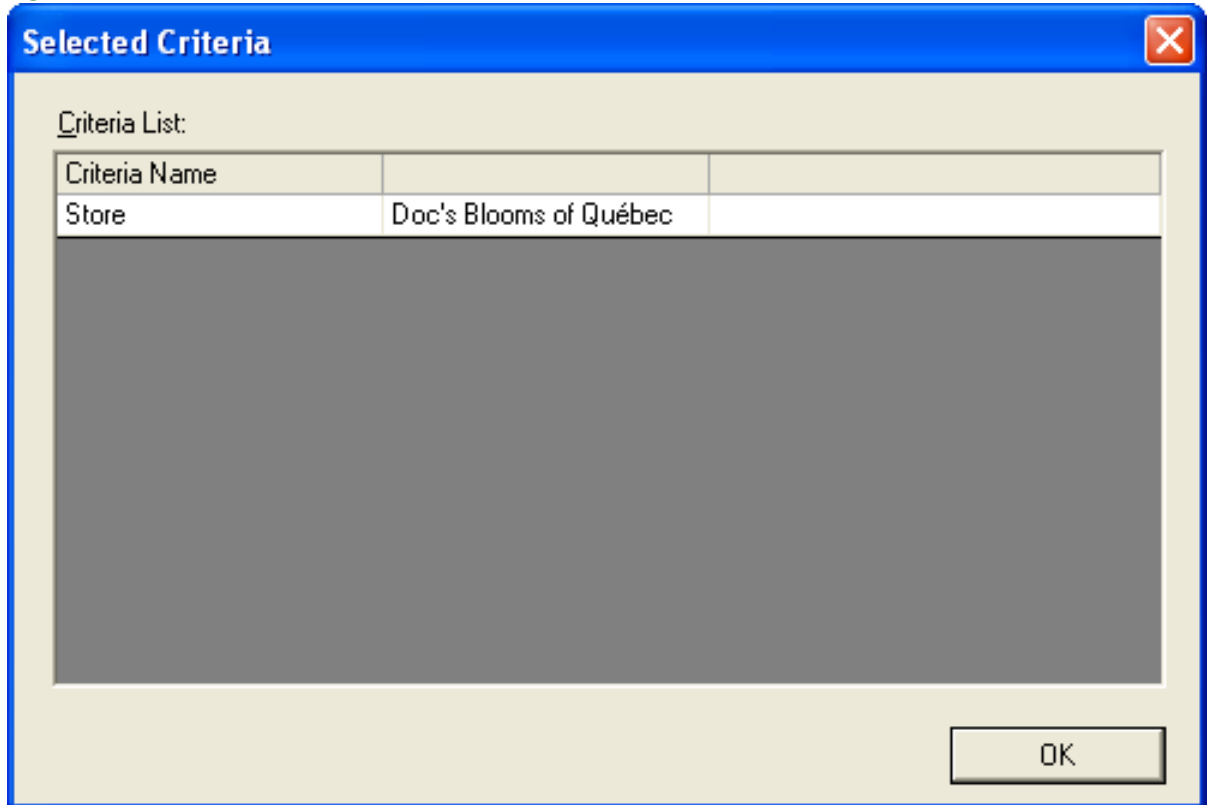
NOTE Although this panel allows you to type information in the grid, it will only save the information for this specific customer list (the information will only be saved in this particular .csv file and will not be saved to your customer database).

Click **Back** to return to the **Output Fields** panel, or click **Next** to proceed to the **Save Campaign** panel.

Selected Criteria Window

The **Selected Criteria** window opens when you click **View Criteria** in the **Preview and Edit List** panel. This window allows you to see the criteria selected for the campaign. When you close this window, you can go back through the Mercury Marketing Wizard to make changes if necessary.

Figure 16-11: Selected Criteria Window



Save Campaign Panel

The **Save Campaign** panel allows you to select options for saving your marketing campaign, such as whether you would like to execute the campaign now or schedule it, if you would like to generate mailing labels, etc.

Figure 16-12: Save Campaign Panel

Mercury Marketing Wizard

Save Campaign

Campaign Type: 'Holiday' List Type: 'All Customers' for DirectMail

Campaign Name:

Referral Code:

Execute Campaign Now

Schedule

Template:

Postcard

Text Only

Sender:

Generate Mailing Labels

Open in Word

Return Address

Name:

Address:

City:

State: Zip/Postal:

Phone:

Following are your options in the Save Campaign window (options will vary depending on what type of campaign you are creating):

Table 16-4: Save Campaign Panel Settings

Setting	Description
Campaign Name	This field lists the campaign name that you entered in the first wizard panel. You can change it if you wish.
Referral Code	This field lists the referral code that you entered in the first wizard panel. You can change it if you wish, or click Add New Referral Code to add a new referral code.
Generate Email List Now	This option is for email marketing campaigns only. Select this option to save the campaign and generate the .csv customer list now. NOTE: Customer lists (.csv files) should not be viewed in Microsoft Excel (the data may be sorted incorrectly when viewing in Excel).
Execute Campaign Now	This option is for direct mail marketing campaigns only. Select this option to save the campaign and merge the letters now.
Schedule	Select this option to schedule the campaign. If you are scheduling the campaign, click Create to create the schedule.

The following fields are for direct mail campaigns only:

Table 16-5: Direct Mail Campaign Settings

Setting	Description
Template	Select the pre-defined template that you would like to use. If you would like to see the template before merging, click Preview .
Post Card	If you would like to print post cards, this option will print four post cards per 8.5" x 11" sheet of paper. If you select this option, make sure post card stock paper is loaded in the printer. NOTE: You can find post card stock paper at your local office supply store, or you can order it through FTD Marketplace at 1-800-767-4000.
Text Only	Select this option if you would like to use a template that does not have any graphics. The letter will be printed as formatted text only.
Sender	Type the name of the person signing the letter or postcard, for example the manager or owner of the store.
Generate Mailing Labels	If you would like Microsoft Word to generate mailing labels, click this option, then select Three Across .
Open in Word	If checked, the letters/postcards will open in Microsoft Word when the merge is complete. If unchecked, the merge will take place but the document will not open in Microsoft Word. The file will be saved in the C:\Wings\Office Templates\Mercury Forms directory. If you plan to send a list and template to a printer, we recommend that you do NOT check Open in Word. Just locate the customer file in the C:\Wings\Customer Lists directory and locate the template in the C:\Wings\Office Templates\Mercury Forms directory and send these to the printer.
Return Address	If you are printing post cards, the Return Address section will become active. The information you type here will display in the return address section of the postcard. Complete the Return Address fields with your shop's address.

Click **Finish**. The campaign will save and you will be returned to the **Marketing Wizard** main panel.

If you selected **Generate Email List Now** or **Generate Mailing Labels Now**, your customer list is saved as a .csv file on your hard drive in the C:\Wings\Customer Lists directory (to view the files in this directory, navigate to it in Windows Explorer, or click the **Find my Previous Lists** link in the first panel of the Marketing Wizard). The file name will be the campaign name, followed by the date and time that you saved the campaign.

NOTE Customer lists are only saved in the C:\Wings\Customer Lists directory on the FTD Mercury server. If you are working on a client PC, you must retrieve the .csv on the server PC in that directory. Clicking the **Find my Previous Lists** link will not find the customer list on the client PC.

Customer lists (.csv files) should not be viewed in Microsoft Excel (the data may be sorted incorrectly when viewing in Excel).

If you scheduled the campaign, the merged letters will be saved in the C:\Wings\Marketing Lists directory automatically each time they are generated according to the campaign schedule (to view the files in this directory, navigate to it in Windows Explorer, or click the **Find my Merged Documents and Mailing Labels** link in the first panel of the Marketing Wizard). If the campaign is an email campaign, the emails will be sent according to your schedule.

Campaign Scheduler Window

When you save a campaign, you have the option of generating the campaign immediately (saving the customer list and/or merging the data into letters), or scheduling the campaign. Creating a schedule for a campaign is ideal for campaigns that you intend to run on a regular basis, for example monthly anniversary or birthday reminder letters. By creating a schedule, you are giving the Mercury Marketing application the information it needs to generate the campaign automatically, without you having to access the program. The Campaign Scheduler allows you to create this schedule.

Figure 16-13: Campaign Scheduler Window

Campaign:	Starting:	Ending:
7/27/2006 4:05 PM		
8/27/2006 4:05 PM		
9/27/2006 4:05 PM		
10/27/2006 4:05 PM		
11/27/2006 4:05 PM		
12/27/2006 4:05 PM		

TASK To create the schedule:

- 1 Specify start and end dates for the campaign in the **Start Date** and **End Date** fields. This will be the period of time that the campaign will be generated for you automatically.
- 2 Select if you would like to run the campaign **Daily**, **Weekly**, **Monthly**, or **Yearly**. Here you are selecting how often you would like the campaign to be generated.
- 3 If you would like to be notified when a list is generated, click **Notify me by Email after Generating the List** and type your email address in the Email field. This will remind you to distribute the campaign.
- 4 In the **Date Range** section, click either **Fixed** or **Floating**. The **Fixed** option should be used for non-reminder campaigns that do not require a range of data to be used. For example, if you are sending out a yearly Mother's Day, Easter, Valentine's Day, etc. campaign and is not related to specific order data in your system, select the Fixed option. The **Floating** option should be used for reminder campaigns, when the campaign requires a range of data (such as "orders placed from April 1, 2003 to April 30, 2003"). For example, if you are sending out a Birthday reminder and you would like to use order information from last year's birthday orders, select the Floating option.
- 5 Click **Generate**. The Campaign Scheduler will list your campaign schedule. The campaign will be run on the date listed in the **Campaign** column. The **Starting** and **Ending** columns list the

date range that will be used to extract order information. If you selected the **Fixed** option, the **Starting** and **Ending** columns will be blank.

- 6 Click **OK** to save the information and return to the Save Campaign window of the Marketing Wizard.
- 7 Click **Finish** in the **Save Campaign** window.

All Criteria Window

The All Criteria window allows you to specify which customers you would like to include in the marketing campaign. For example, you may want to only include customers within certain zip codes or only customers with a particular billing cycle.

To select criteria, first click on a field's check box to select that field, then in the text area type or select the criteria for your marketing campaign. When you are finished selecting criteria, click **OK** to return to the **Key Criteria** panel.

Wire Service Reconciliation

Wire Service Reconciliation verifies that you are either paying the correct amount of money to or receiving the correct amount of money from the wire services to which you subscribe. Automatic and manual reconciliation allow you to compare the data on your monthly Combined Report to the orders in FTD Mercury.

Regardless of whether you use Automatic Reconciliation or Manual Reconciliation, you have three main options when reconciling your statement:

Table 17-1: Reconciliation Options

Option	When to Use
Reconcile	If you want to match an order on your Combined Report to one in your Message Log because all of the order information matches between these two sources.
Dispute	If you have been billed for the wrong amount or billed in error and wish to create an ADJustment Message (see ADJustment Report Message on page 4–38).
Unmatch	Clears the reconciled or disputed status.

Automatic Reconciliation

Automatic Reconciliation compares the data on your Combined Report disk to the data in FTD Mercury. If you do not receive your Combined Report on disk, call Member Services at 1-800-788-9000 to request a monthly shipment of the disk along with your printed statement. You can also view your statement online at www.ftdi.com.

When loading the Combined Report file from disk, FTD Mercury compares the orders from the disk to the orders on your system and reconciles all orders that match automatically. Orders may not match for several reasons—for example, different order amounts, recipient names, or delivery dates. You can then work from that screen to reconcile or dispute the remaining orders manually.

You cannot automatically reconcile data in your system that is dated more than three months prior to the statement date for that month's statement. However, you can use Manual Reconciliation to reconcile those orders.

NOTE

To reconcile previous batches, use the Auto Reconciliation History command on the Wire Reconciliation menu.

Automatically Reconciling Data

TASK To automatically reconcile data:

- 1 On the **Wire Reconciliation** menu, click **Load Wire Reconciliation**.
- 2 From the **Statement Date** list, click the arrow to display a calendar and select the date displayed on the printed Combined Report.
- 3 From the **Wire Service** list, select **FTD**.
- 4 Insert the Combined Report disk into your floppy disk drive.
- 5 In the **File Name** field, click the search button, select the **A:** drive in the drop-down menu, and navigate to the appropriate Combined Report statement file on the disk.
File names are in the format: shopcodecb.xxx, where xxx is the 3-letter abbreviation for the month represented in the Combined Report. For example, if your shop code is 90-0034AA, and this is the Combined Report for the month of September, the file you are searching for is named 900034cb.sep.
- 6 Click **Load**. The **Match Reconciliation** window opens and fills in with the orders from your Combined Report displayed in the bottom box, and the Mercury orders in your Message Log in the top box.

When you click on an order in the bottom box, the matching order in your Message Log is highlighted in the top box so you may compare. Orders with matching information are reconciled automatically and appear in green in the bottom box. If you want to see details about the order, double-click on a line in the top box to view the order in full detail.

TIP Keep the following in mind:

- » You may double-click on a line in the top box to view the order in full detail.
 - » Use the totals sections to help you balance your books with your Combined Report. Note that the dollar amount displayed in the "Disputed" column is the dollar amount of the disputed transactions in the list (not the actual disputed amount created through ADJustment messages).
- 7 If no match was found, nothing is highlighted in the upper box. Under that circumstance, you may either:
 - » Find the order in the top box you believe should match and click **Reconcile** or **Dispute**.
 - » If you are unable to find anything in the top box that should match, click **Reconcile**. This creates a synthetic order with a status of **Exception** in your Message Log. Under that circumstance, the synthetic order remains in your Message Log until it is reconciled during your automatic reconciliation session next month.
 - 8 Click **Save** when you have finished reconciling orders.
 - 9 Remove the disk from the floppy disk drive.

Auto Reconciliation History Window

The Auto Reconciliation History window allows you to access batches you have loaded onto your system from previous automatic wire reconciliation sessions. Using the auto wire reconciliation history feature of your FTD Mercury system saves you valuable time, as you may return to and edit any previously loaded batches.

NOTE It is not recommended that you load the data for each statement from your Combined Report diskette into your system more than once.

Highlight the statement you wish to edit in the list, and click Edit.

Figure 17-1: Auto Reconciliation History Window

Statement Date	Reconcile Date	Wire Service
03/14/2005	03/14/2005	FTD
02/12/2005	02/12/2005	FTD
02/12/2005	02/12/2005	FTD
01/17/2005	01/17/2005	FTD
01/17/2005	01/17/2005	FTD
01/17/2005	01/17/2005	FTD
12/14/2004	12/14/2004	FTD
12/14/2004	12/14/2004	FTD
12/14/2004	12/14/2004	FTD
12/14/2004	12/14/2004	FTD
11/13/2004	11/13/2004	FTD
10/13/2004	10/13/2004	FTD
09/07/2004	09/07/2004	FTD
08/05/2004	08/05/2004	FTD
07/14/2004	07/14/2004	FTD
06/30/2004	07/14/2004	FTD
06/14/2004	06/14/2004	FTD
06/14/2004	06/14/2004	FTD

Load Reconciliation File Window

The Load Reconciliation File window allows you to load data from your Combined Report so you can complete the automatic wire reconciliation process. FTD recommends you load data from each statement into FTD Mercury only once. Contact Member Services at 1-800-788-9000 for more information on automatic wire reconciliation.

Figure 17-2: Load Reconciliation File Window

Statement Date: 4/14/2008

Wire Service: FTD

File Name: 900034cb.mar

Load Escape

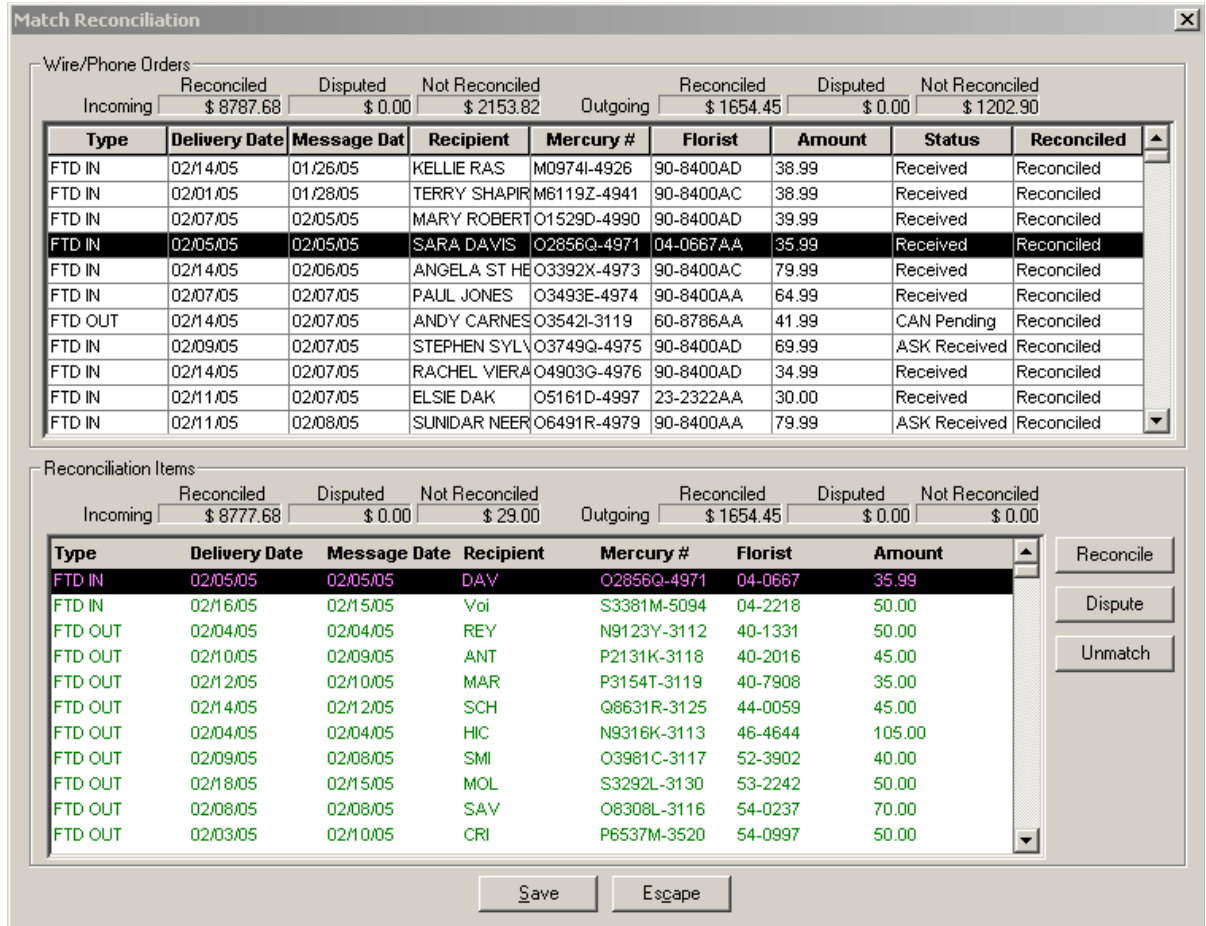
Match Reconciliation Window

The Match Reconciliation window allows you to compare the data in your Message Log to the data on the Combined Report during the automatic reconciliation process. You may also designate a status of "reconcile" or "dispute" to each order. Please remember that data in your system older than three months prior to the statement date will not be listed in your top text box (which

contains the Mercury orders in your Message Log). In order to perform an automatic wire reconciliation, you must first load the diskette data into your system. Or, you may use the data from previous batches.

NOTE Wire Service Reconciliation only includes billable orders. Orders from Flowers All Hours, Flowers Online, as well as voided and cancelled orders do not appear in Wire Service Reconciliation.

Figure 17-3: Match Reconciliation Window



Manual Reconciliation

Manual wire reconciliation is an alternative to automatic reconciliation if you do not receive a monthly Combined Report disk. Perform Manual Reconciliation each month when you receive your Combined Report, comparing the data in your system to the orders shown on your printed Combined Report.

TASK To manually reconcile orders:

- 1 On the **Wire Reconciliation** menu, click **Manual Wire Reconciliation**.
- 2 In the **From Date** field, click the arrow to display a calendar. With your mouse, choose the date from which you want to begin the list of orders in your Message Log.
- 3 In the **To Date** field, click the arrow to display a calendar. With your mouse, choose the date at which you wish to end the list of orders in your Message Log.
- 4 In the **Wire Service** field, click the arrow and select from the list the wire service for which you want to reconcile orders.
- 5 In the **Store Name** field, select the store that you are reconciling or select **All Stores**.

- 6 Click **Filter**. The system only displays orders for the given wire service and the given date range.
- 7 Once the list of orders appears in the **Manual Reconciliation** window, highlight each order and click **Reconcile**, **Dispute**, or **Unmatch**. Or, click in the appropriate column so an **X** appears.
- 8 Click **Save** when you have finished reconciling orders.

Manual Reconciliation Window

The **Manual Reconciliation** window will allow you to reconcile orders in your system if you are unable to perform an automatic wire reconciliation because your diskette is damaged, did not arrive, etc. Wire reconciliation in general verifies that you are either paying the correct amount of money or receiving the correct amount of money from the wire service. You will need to compare the data in your system to the orders shown on your Combined Report. A printed copy of your Combined Report is sent to you monthly, at no charge. Perform this procedure each month when you receive your Combined Report.

Figure 17-4: Manual Wire Reconciliation Window



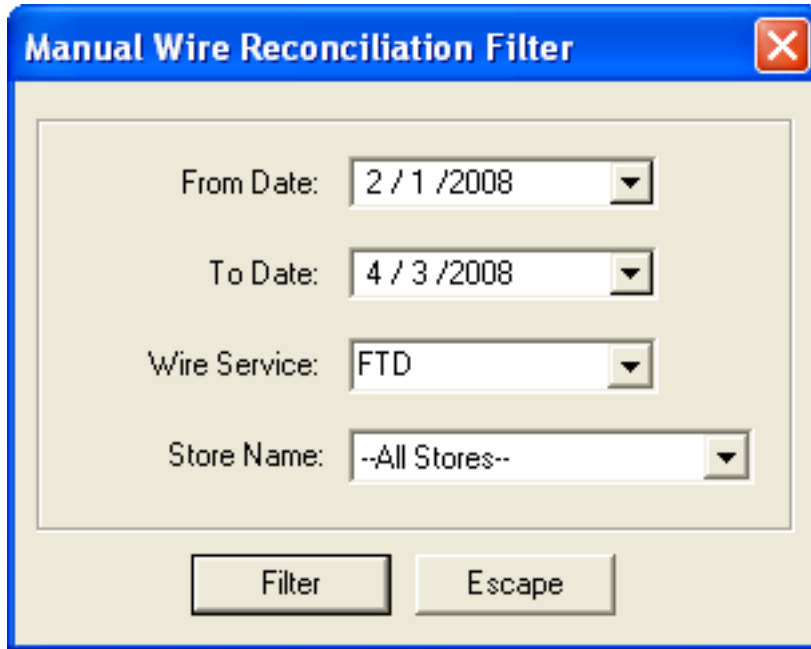
The screenshot shows a window titled "Manual Reconciliation" with a table of orders. The table has the following columns: Type, Delivery Dat, Message Da, Recipient, Mercury #, Florist, Amount, Status, Reconciled, and Disputed. Below the table are five buttons: Save, Reconcile, Dispute, Clear, and Escape.

Type	Delivery Dat	Message Da	Recipient	Mercury #	Florist	Amount	Status	Reconciled	Disputed
FTD IN	02/13/08	03/11/08	Tess Mitchel	A2923U-0207	90-0001EE	85.00	Received		
FTD IN	02/13/08	03/11/08	Terry Jones	A2923V-0208	90-0001EE	110.00	Received		
FTD IN	02/22/08	03/11/08	Jane Smithe	A2933L-0209	90-0001EE	65.00	Received		
FTD OUT	03/17/08	03/17/08	Jon Hart	A9341E-8741	90-9085JW	75.00	Phoned		
FTD OUT	03/27/08	03/27/08	ELYSE DAK	A3015F-0180	90-9085AF	59.99	Sent		
FTD IN	03/27/08	03/27/08	Betsy Butter	A3412J-0907	90-9085AF	69.99	Phoned		
FTD IN	03/27/08	03/27/08	Betsy Butter	A4201G-1185	90-9085AF	69.99	Phoned		

Manual Wire Reconciliation Filter Window

The **Manual Wire Reconciliation Filter** window allows you to filter what is displayed in the **Manual Reconciliation** window. You can filter by a date range, wire service, or store.

Figure 17-5: Manual Wire Reconciliation Filter Window



Reconcile Detail Window

This window displays detail information from the reconciliation items in your Combined Report data. The information in this window is read only and cannot be changed.

For information on a particular field in this window, right click on that particular field.

Editing Previous Wire Reconciliation Batches

Using the Auto Reconciliation History feature of FTD Mercury saves you valuable time, as you may return to any previously loaded batch to reconcile or dispute orders.

CAUTION It is not recommended that you load the data for each statement from your Combined Report disk into your system more than once.

TASK To reconcile wire orders from batches you have loaded on your system from previous Combined Report statement files:

- 1 On the **Wire Reconciliation** menu, click **Auto Reconciliation History**.
- 2 When the **Auto Reconciliation History** window opens, it displays the statement files. Select the statement you want to edit in the list and click **Edit**.
- 3 Once the **Match Reconciliation** window opens, follow the automatic wire reconciliation process as you normally would. See [Automatic Reconciliation](#) on page 17-1 for detailed procedures.
- 4

Accounts Receivable

The billing functionality in FTD Mercury allows you to set up an automated billing system, complete with aging cycles, finance charges, and statements for your customers. You can bill your customers using printed statements, or you can send e-mail or fax statements.

Billing Functions

- » [Establishing House Accounts](#) on page 18–1
- » [Receiving Payments on House Accounts](#) on page 18–2
- » [Generating Statements](#) on page 18–12
- » [Re-Printing/Re-Faxing/Re-Emailing Statements](#) on page 18–19
- » [Creating Credit Memos](#) on page 18–25
- » [Creating Debit Memos](#) on page 18–25
- » [Searching for Statements](#) on page 18–20

Establishing House Accounts

The billing process begins with establishing up house accounts for customers. For complete information on setting up house accounts in FTD Mercury, see [Setting Up House Accounts](#) on page 7–29.

Receiving Payments on House Accounts

When you receive payments on a customer's house accounts, you need to enter them in FTD Mercury. As payments are entered into the system, the customer's balance is updated immediately (as long as the payment is not entered for a future date). When open item account customers make a payment, you must apply the payment to a particular ticket. Balance forward accounts automatically apply payments to the oldest invoice.

When a customer walks in with payment, you typically want to record the payment in the Point of Sale window (see [Receiving Payments in Point of Sale](#) on page 18-2). For all other cases, use the Receive Payment button from the FTD Mercury Main Menu (see [Receiving Payment from the FTD Mercury Main Menu](#) on page 18-4).

Receiving Payments in Point of Sale

There are three main scenarios when receiving payments in Point of Sale, differentiated by payment type.

Cash Payments

TASK To receive a house account payment in cash in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 Click **Receive Payment**. The **Receive Customer Payment on Account** window opens.
- 3 In the **Customer** field, enter the customer's name and press **TAB**, or click the **Search** button (...) to perform a Customer Search. Once the customer has been located, the text box below the name displays the customer's address and phone number, and the text box to the right of the name displays information about their account (including current balance).

TIP When performing a Customer Search, to verify you have the correct customer, check the Account column (which displays the account number) and/or the Balance column (which displays the balance).

- 4 In the **Payments** area:
 - a. In the **Type** column, select **Cash**.
 - b. In the **Amount** column, enter the amount being paid towards the outstanding balance. This may be different than the amount of cash being provided by the customer.
- 5 The **Allocation** area is available only for customers who have open item accounts. In such cases, each ticket with its corresponding information displays. Enter the dollar amount to be allocated to each ticket in the **This Payment** column. The **Unallocated Balance** field shows the outstanding dollar amount still to be paid on this open item account. You can also double-click on an unpaid amount to move the entire amount of that ticket to the **This Payment** column and add the amount to the payment total.
- 6 In the **Tendered Amount** field, enter the amount of cash the customer is providing you as payment. If this amount is more than the amount entered in the **Amount** column in the **Payments** area, the window displays the amount that will be due back to the customer as change for their payment.
- 7 Click the **Batch Mode** check box so a check mark appears if you wish to record several customer house account payments. Batch mode keeps the window open so that you do not have to re-access the window to enter another payment.
- 8 Click **Complete**. A receipt prints (if the payment type is a credit card and your system is set up to process credit card transactions, two additional receipts with signature lines also print). Click **Close** to return to the **Point of Sale** window, or click **Reprint Receipt** to reprint an additional receipt.

Check Payments

TASK To receive a house account payment by check in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 Click **Receive Payment**. The **Receive Customer Payment on Account** window opens.
- 3 In the **Customer** field, enter the customer's name and press **TAB**, or click the **Search** button (...) to perform a Customer Search. Once the customer has been located, the text box below the name displays the customer's address and phone number, and the text box to the right of the name displays information about their account (including current balance).

TIP

When performing a Customer Search, to verify you have the correct customer, check the Account column (which displays the account number) and/or the Balance column (which displays the balance).

- 4 In the **Payments** area:
 - a. In the **Type** column, select **Check**.
 - b. In the **Name** column, ensure the name is the name on the check.
 - c. In the **Amount** column, enter the check amount.
- 5 The **Allocation** area is available only for customers who have open item accounts. In such cases, each ticket with its corresponding information displays. Enter the dollar amount to be allocated to each ticket in the **This Payment** column. The **Unallocated Balance** field shows the outstanding dollar amount still to be paid on this open item account. You can also double-click on an unpaid amount to move the entire amount of that ticket to the **This Payment** column and add the amount to the payment total.
- 6 Click the **Batch Mode** check box so a check mark appears if you wish to record several customer house account payments. Batch mode keeps the window open so that you do not have to re-access the window to enter another payment.
- 7 Click **Complete**. A receipt prints (if the payment type is a credit card and your system is set up to process credit card transactions, two additional receipts with signature lines also print). Click **Close** to return to the **Point of Sale** window, or click **Reprint Receipt** to reprint an additional receipt.

Credit Card Payments

TASK To receive a house account payment via credit card in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 Click **Receive Payment**. The **Receive Customer Payment on Account** window opens.
- 3 In the **Customer** field, enter the customer's name and press **TAB**, or click the **Search** button (...) to perform a Customer Search. Once the customer has been located, the text box below the name displays the customer's address and phone number.

TIP

When performing a Customer Search, to verify you have the correct customer, check the Account column (which displays the account number) and/or the Balance column (which displays the balance).

- 4 In the **Payments** area:
 - a. From the **Type** column, **Credit**.
 - b. Swipe the credit card or enter the account or card number in the **Account Number** field. You can also click in the column to select from previously used credit card numbers.
 - c. In the **Exp Date** column, enter the expiration date of the card (if it was not populated via the swipe).
 - d. In the **Name** column, enter the cardholder name (if it was not populated via the swipe).

- e. In the **Amount** column, enter the payment amount.
- 5 The **Allocation** area is available only for customers who have open item accounts. In such cases, each ticket with its corresponding information displays. Enter the dollar amount to be allocated to each ticket in the **This Payment** column. The **Unallocated Balance** field shows the outstanding dollar amount still to be paid on this open item account. You can also double-click on an unpaid amount to move the entire amount of that ticket to the **This Payment** column and add the amount to the payment total.
- 6 Click the **Batch Mode** check box so a check mark appears if you wish to record several customer house account payments. Batch mode keeps the window open so that you do not have to re-access the window to enter another payment.
- 7 Click **Complete**. A receipt prints (if the payment type is a credit card and your system is set up to process credit card transactions, two additional receipts with signature lines also print). Click **Close** to return to the **Point of Sale** window, or click **Reprint Receipt** to reprint an additional receipt.

Receiving Payment from the FTD Mercury Main Menu

TASK To receive payment from the FT D Mercury Main Menu:

- 1 On the **FTD Mercury Main Menu**, click **Receive Payment**. The **Receive Customer Payment on Account** window opens.
- 2 For multi-store environments, select the store at which the payment will be recorded.
- 3 In the **Date** field, enter the date of the payment.
- 4 If you want to reopen this window after you are finished (for example, if you are recording many payments at once), select the **Batch Mode** check box.
- 5 In the **Customer** field, enter the customer's name and press **TAB**, or click the **Search** button (...) to perform a **Customer Search**. Once the customer has been located, the text box below the name displays the customer's address and phone number.

TIP When performing a Customer Search, to verify you have the correct customer, check the Account column (which displays the account number) and/or the Balance column (which displays the balance).

- 6 In the **Payments** area, in the **Type** column, select the payment type. Typically, these are payments received in the mail with a check. However, if you are provided with a credit card number:
 - a. Enter the account or card number in the **Account Number** field. You can also click in the column to select from previously used credit card numbers.
 - b. In the **Exp Date** column, enter the expiration date of the card.
 - c. In the **Name** column, enter the cardholder name.
 - d. In the **Amount** column, enter the payment amount.
- 7 The **Allocation** area is available only for customers who have open item accounts. In such cases, each ticket with its corresponding information displays. Enter the dollar amount to be allocated to each ticket in the **This Payment** column. The **Unallocated Balance** field shows the outstanding dollar amount still to be paid on this open item account. You can also double-click on an unpaid amount to move the entire amount of that ticket to the **This Payment** column and add the amount to the payment total.
- 8 Click **Complete**.

Receive Customer Payment On Account Window

The Receive Customer Payment On Account window is used to record customer payments on house accounts. The customer's balance is updated immediately. Payments on open item accounts are applied toward tickets, whereas payments made on balance forward accounts are automatically applied toward the oldest invoice.

Figure 18-1: Receive Customer Payment on Account Window

Receive Customer Payment On Account - New Payment: 000076

Store Name: Date:

Customer:

...

205 N BECK RD
CANTON, MI 48187-4808

Balance Forward Accounting
Account Number: 0000009
Total Balance Due: 82.19
Current Balance: 82.19
30 Day Balance: 0.00
60 Day Balance: 0.00
90 Day Balance: 0.00

Type	Account Number	Exp Date	Name	Approval	Amount
Cash					\$ 82.19

Unallocated Credit: Total Amount:

Ticket	Date	Total	Unpaid	This Payment

Unallocated Balance:

Batch Mode

In Point of Sale, when you receive payment on a customer account, a receipt will print for the customer.

For Canadian systems, when receiving payment on a house count using Point of Sale (click the Receive Payment button in the Point of Sale window), you can specify if you are receiving payment in U.S. or Canadian funds by selecting the appropriate fund type from the Exchange list next to the Tendered Amount field. If you select US, the funds are converted to Canadian dollars using the local exchange rate in the Store Settings screen in Mercury Administration.

The Receive Customer Payment on Account window is divided into several areas:

Store Name/Date Area

The Store Name selection list and Date fields only appear if you access the window from the FTD Mercury Main Menu. From the list, you can select the store to which to post the payment. You can also select the date for the payment.

NOTE

Payments received via Point of Sale are posted to the store associated with the Point of Sale session and are recorded as the current date.

Customer Area

In the Customer area, enter or search for the customer for whom this payment is being made. When the customer has been identified, the customer's address and current balance information and account number are displayed.

Payments Area

In the Payments area, select the payment type for this payment and enter the amount being paid on the outstanding account balance (this may be different than the amount tendered in cash from the customer). If this is a credit card payment, you need to enter the account number, expiration date, and name on the credit card.

If you enter a payment that is incorrect, highlight the row and click Remove to remove it.

The Total Amount field displays the total amount of all payments that are to be applied against the outstanding balance on the house account. The Unallocated Credit field displays any unallocated credits from previous payments.

Allocation Area

The Allocation area is available only for customers who have open item accounts. Additionally, the customer must have unpaid invoices for tickets to appear in this list.

In such cases, each ticket with its corresponding information displays. Enter the dollar amount to be allocated to each ticket in the This Payment column. The Unallocated Balance field shows the outstanding dollar amount still to be paid on this open item account from the current payment. You can also double-click on an unpaid amount to move the entire amount of that ticket to the This Payment column and add the amount to the payment total.

If FTD Mercury is configured (via Mercury Administration) to allocate payments across invoices from all stores, all unpaid invoices from all stores appear in the Allocation list. If FTD Mercury is configured to allocate payment only to invoices in the store where the payment is received, only the unpaid invoices for the store selected for the payment displays in the Allocation list.

Tendered Area

If the payment type supports a tendered amount, enter the amount you are receiving in the Tendered Amount field. If you are a Canadian shop, select whether the amount is in U.S. or Canadian dollars. The Change Due reflects the difference between the payment amount and the tendered amount.

Also, in the lower right corner of the window when accessed in Point of Sale, the Batch Mode check box allows you to automatically reopen the Receive Customer Payment on Account window following completion of the payment.

Button Ribbon

The following buttons are at the bottom of the window:

Table 18-1:

Button	Description
Print	Prints an acknowledgement of the payment received.
Complete	Completes the payment transaction.
Update	This button, available only when receiving payment in Point of Sale via credit card or debit card, appears if the card is declined. You can then change the payment and click this button to update the payment.

Table 18-1:

Button	Description
Cancel Payment	When you open a previously made payment, you can click this button to cancel the payment. This is helpful if you accidentally put the wrong payment on a customer's account, or if you entered the wrong payment amount. NOTE: Canceled payments do not appear on customer statements.
Reprint Receipt	This button, available when accessing this window from Point of Sale, enables you to reprint the receipt for payment.
Escape	Closes the window without recording any changes.

Allocating Previous Payments

If you had previously received a payment on an open item account and had not allocated payment, there is an unallocated credit on the account. You can later access the account and allocated payments.

TASK To allocate previous payments:

- 1 On the **FTD Mercury Main Menu**, click **Receive Payment**. The **Receive Customer Payment on Account** window opens.
- 2 For multi-store environments, select the store at which the payment will be recorded.
- 3 From the **Date** field, enter the date of the payment.
- 4 If you want to reopen this window after you are finished (for example, if you are recording many payments at once), select the **Batch Mode** check box.
- 5 In the **Customer** field, enter the customer's name and press **TAB**, or click the **Search** button (...) to perform a **Customer Search**. Once the customer has been located, the text box below the name displays the customer's address and phone number.

TIP When performing a Customer Search, to verify you have the correct customer, check the Account column (which displays the account number) and/or the Balance column (which displays the balance).

- 6 The **Unallocated Credit** field displays the amount of unallocated credit. In the **Allocation** area, enter the dollar amount to be allocated to each ticket in the **This Payment** column. The **Unallocated Balance** field shows the outstanding dollar amount still to be paid on this open item account. You can also double-click on an unpaid amount to move the entire amount of that ticket to the **This Payment** column and add the amount to the payment total.
- 7 Click **Complete**.

Canceling Payments

Customer payments are displayed in Ticket Search. You can cancel payments made to house accounts if certain criteria are met:

- » Payments made in Point of Sale can only be canceled in Point of Sale (you cannot cancel these payments by opening them in Ticket Search via the Order Entry window or the FTD Mercury Main Menu).
- » You can only cancel a payment if it has not yet been printed on a customer's statement.
- » Payments can only be canceled if they have not yet been exported to QuickBooks.
- » You must have appropriate user rights to cancel a payment.
- » If the payment was made using a credit card, the transaction must still be unsettled.

When you cancel a payment, allocations made to house accounts are removed. Subsequent searches in Ticket Search display the transaction as cancelled.

If you cancel a payment in Point of Sale, a receipt prints with the word Cancelled on the receipt. Cancelled transactions are included in the X out and Z out payment totals, and are listed as Voided <payment type> with the payment type as one of the following:

- » Cash & Check
- » Credit Card
- » Debit Card
- » Gift Certificate

Voided payments are listed as negative amounts, and are included in the void totals in X out and Z out reports.

TASK To cancel a house account payment which was taken in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 Click **Lookup**. The **Ticket Search** window opens.
- 3 Enter criteria to locate the transaction you want to cancel and click **Search**.
- 4 From the results list, double-click on the payment you want to cancel. The **Receive Customer Payment on Account** window opens.
- 5 Click **Cancel Payment**. The **Cancel or Void Order** window opens.
- 6 Enter your **Login Name** and **Password** and click **OK**.

TASK To cancel a house account payment which was taken from the FTD Mercury Main Menu:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. The **Ticket Search** window opens.
- 2 Enter criteria to locate the transaction you want to cancel and click **Search**.
- 3 From the results list, double-click on the payment you want to cancel. The **Receive Customer Payment on Account** window opens.
- 4 Click **Cancel Payment**. The **Cancel or Void Order** window opens.
- 5 Enter your **Login Name** and **Password** and click **OK**.

Statements

To print, fax, or email statements to your customers, you must generate them in your system first. You can generate statements for multiple billing cycles at once. Your system then gives you printing/faxing/emailing options and prints/sends the statements for you.

NOTE Make sure that before you generate statements, you select the cover letters/templates to use, the time the faxes/email messages should be sent, and specify a reply email address. You are not be allowed to fax or email statements if you do not have cover letters selected for your email messages/faxes. You must also specify a reply email address. See [Fax Screen](#) on page 24–28 and [Email Screen](#) on page 24–25 to learn how to set up this information.

To fax or email statements to your customers, you must complete a few configurations in FTD Mercury. After your system is set up, the process is very simple because faxes and email messages are sent to your customers automatically from FTD Mercury when you generate statements—you don't even need to access a fax machine or open your email account.

Required Setups for Faxing and Emailing Statements

Configurations Required for Emailing Statements

To email statements, you must complete the following setups:

- » **Set up an Internet connection in Mercury Administration.** You must have an Internet connection in order to send email. You can use any type of Internet connection (dial-up [AOL only], DSL, etc.), as long as you can connect. If you do not already have an Internet connection, see [Internet Screen](#) on page 24–30 to learn how to set it up.

If you are using a dial-up connection, you must specify which phone line is used for the Internet. See [Phone Lines Screen](#) on page 24–37 to learn how to set up this information.

- » **Set up your ISP information in Mercury Administration.** If you do not already have access to the Internet, you have to sign up with an ISP company. You can do this on your own, or the Mercury Technology Assistance Center at 1-800-669-1000 can help you (you can sign up with FTD's ISP service, FTD InternetLink). An ISP is a company that provides you with the software or access information that enables your computer to connect to the Internet. If you can connect to the Internet, you are already using an ISP.

After signing up with an ISP, you must set up FTD Mercury with your Internet and outgoing mail server information for that ISP. See [Internet Screen](#) on page 24–30 and [MailServer Screen](#) on page 24–31 to learn how to set up this information.

- » **Set up your default email settings in Mercury Administration.** You are not allowed to email statements until you select a cover letter and specify a reply address for your email messages. Also, there are many other defaults that you can set up. See [Email Screen](#) on page 24–25 for more information.

Configuration Required for Faxing

- » **Set up the phone line in Mercury Administration.** To send a fax, you need a phone line available. Depending on how often you will fax statements, you can share this phone line with another line, except for your Mercury line. (To avoid busy phone lines, you can specify a “later” time for sending faxes, when your shop is less busy. See [Fax Screen](#) on page 24–28 for more information.) Decide which phone line will be used for faxes, then specify this phone line in Mercury Administration (see [Phone Lines Screen](#) on page 24–37).
- » **Set up your default fax settings in Mercury Administration.** You are not allowed to fax statements until you select a cover letter for your faxes. Also, there are many other defaults that you can set up. See [Fax Screen](#) on page 24–28 for more information.

Configuration for a Smooth Billing Process

- » **Collect customers' email addresses and fax numbers.** (see [Collecting Customers' Email/Fax Information](#) on page 18–10) It is impossible to send faxes or email messages to customers without the customers' fax numbers and email addresses saved in their accounts. (This is an ongoing process – you can continue to print statements for customers that do not have email addresses or fax numbers saved in the system.)
- » **Select the preferred billing method for each customer.** (see [Selecting a Customer's Preferred Billing Method \(Email, Fax, or Printed Statement\)](#) on page 18–10) By default, each customer is selected to print statements only, so if you want to fax or email statements to customers instead, you have to change these settings for each customer based on the customer's preferences.

Collecting Customers' Email/Fax Information

If you plan on faxing and/or emailing statements to your customers, you have to collect your customers' fax numbers and/or email addresses. You will want your employees to ask customers how they want to be billed (printed statement, fax, or email) and collect the relevant information (you have the option to bill customers using any combination of these three methods).

The more email addresses and fax numbers you save, the less money you will have to spend to print statements and mail them to your customers. Also, collecting email addresses for customers allows you to use other new features in this release – Delivery Confirmation and email marketing with Mercury Marketing (if you purchased the Mercury Marketing module).

If you are faxing and/or emailing statements to customers, you must have the fax and/or email address saved for the customer in the customer account. To save a fax number or email address for a customer, access the customer record (through a Customer Search), then enter the information into the Contact Information section as shown below:

Figure 18-2: Saving a Fax/Email Address in the Customer Record

The screenshot shows the 'Customer Detail Information' window for Heather Smith (ID: 000009). The window has several tabs: General, House Account, Statistics, Credit Cards, Contacts, Order History, Marketing, Statement, and Standing Order. The 'General' tab is active. The 'Customer' section shows the name 'Heather Smith' and 'Sort Name Key: Smith, Heather'. The 'Address Information' section has a 'Home*' dropdown menu and a text field containing '123 N MAIN ST PLYMOUTH, MI 48170-1235'. The 'Billing Address' checkbox is checked. The 'Contact Information' section has a 'Fax*' dropdown menu with '734-555-1212' entered, and an empty 'E-mail Address' field. The 'Store Of Origin' dropdown menu is set to 'Doc's Blooms'. The 'Tax Details' section has 'Tax Exempt' and 'Exempt Code' fields, and a 'Discount Percent' field set to '0.00'. The 'Referral Code' dropdown menu is set to 'Friend'. The 'Delivery Confirmation' section has 'Include In Direct Mail Marketing', 'Include In E-Mail Marketing', and 'Active Status' checked, and 'Do not Purge' unchecked. A 'Notes...' button is located at the bottom right. At the bottom of the window are buttons for 'Save', 'Print', 'Previous', 'Next', 'Delete', 'Escape', and a 'Batch Mode' checkbox.

To save an email address, type the email address in the **E-mail Address** field. To save a fax number, select **Fax** from the drop-down list, then type the fax number in the text field. When you are finished, click **Save** to save your changes, then click **Escape** to exit the window.

Selecting a Customer's Preferred Billing Method (Email, Fax, or Printed Statement)

After you enter a customer's fax and email addresses, the next step is to indicate whether the customer wants to receive statements by mail, email, or fax (or any combination of these methods). You indicate this information in the House Account tab of the Customer Detail Information window (on the FTD Mercury Main Menu, in the Search area, click Customer, locate the account and select it, then click the House Account tab).

Figure 18-3: Selecting a Customer's Preferred Billing Method

Customer Detail Information - Heather Smithe : 0000009

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

Account ID: 0000009 **Auto**

Accounting Type: Balance Forward Accounting

Credit Limit: \$200.00

Billing Cycle: Daily

Default Payment: House

Annual Finance Charge: .00 %

Minimum Finance Charge: \$0.00

Finance Grace Period: 30 Days

Print Statements: Print Invoices: Fax Statements: Email Statements: Print Dunning Messages:

Terms on Account: _____

Save Print Previous Next Delete Escape Batch Mode

At the bottom of the window, check any of these options for the customer. When an option is checked, it is true (for example, the customer above only receives statements by fax and email). You can check any combination of the the following:

- » **Print Statements** to print statements to mail to the customer.
- » **Print Invoices** to print invoices at the same time as statements for the customer.
- » **Fax Statements** to send a fax statement to the customer automatically when statements are generated.
- » **Email Statements** to send an email statement to the customer automatically when statements are generated.
- » **Print Dunning Messages** to include a dunning message (as configured in Mercury Administration) on the statement.

When you are finished, click Save to save your changes, then click Escape to exit the window.

Generating Statements

TASK To generate statements:

- 1 On the **FTD Mercury Main** menu, click **Statements**. To generate a statement for an individual customer, bring up that customer record and in the **Statement** tab, click **New Statement**.
- 2 Select the statement and sorting information:
 - a. In the **Store Name** field, highlight the store for which you wish to generate statements, or select **All Stores** to generate statements for all stores (the statement run is consolidated and not associated with a particular store).

If your customers should receive one bill, regardless of where transactions were placed, you should generate statements for **All Stores**. However if you have separate locations and want to send your customers separate bills from each location, you should generate statements for each store individually.
 - b. In the **Billing Cycle** field, highlight the cycle(s) for which you are generating statements.
 - c. In the **Primary Sort** field, click the arrow and choose whether you wish to sort statements by name (alphabetically), account number, billing cycle, or postal code.
 - d. In the **Secondary Sort** field, click the arrow and choose whether you wish to sort further according to billing cycle or postal code.
 - e. For the **Billing Method**, click **Statement Billing**.
 - f. In the **Statement Billing** area, select the **Statement Date**.
 - g. Click the **Generate Finance Charges** check box so a check mark appears if you want finance charges to be calculated on customers' statements. (A window appears after you click **OK** that allows you to remove finance charges for individual customers.)
 - h. In the **Promotional Message** text box, type in any promotional message you wish to be printed on customer statements. There is a limit of 123 characters in this text box.
 - i. Click **OK**.
- 3 When the **Finance Charge** window appears, highlight any customers in the list for whom you do not wish to generate finance charges and click **Remove**. Click **OK** to accept the finance charges for the (remaining) customers in the list.

If there are no finance charges to apply, you receive the prompt "No customer is eligible for finance charges." Click **OK**.
- 4 At the **Output Statements** window, specify your print/fax/email options. You have options to send faxes/email messages **Now** (after the statements are generated) or **Later** (the "Later" time that you specified in Mercury Administration [to set the "Later" time in Mercury Administration, see [Email Screen](#) on page 24–25 and [Fax Screen](#) on page 24–28]).

Following are other options in this screen:

- » Choose whether you want your statements to be printed **One** per page or **Two** per page. If you choose **one** per page, make sure that 8.5" x 11" size paper is loaded in the printer. If you choose **two** per page, make sure that 8.5" x 14" size paper is loaded in the printer.
- » Select whether you want to print a copy of invoices for the statement. This option is only available if at least one of the accounts is configured to print invoices with statements; if you select this option, invoices will be printed following invoices only for accounts where printing invoices has been selected. Accounts that do not have printing invoices selected will not print invoices; you must configure that account in the House Account tab of the Customer Detail Information if you want invoices to print following statement printing.

- » Check **Include Credit balances** to indicate that you want statements with credit balances to be printed in this batch. If you do not want statements with credit balances to print, clear this option.
 - » Check **Only if Activity Since Last Statement** to indicate that you want the system to print/fax/email statements only for those accounts with activity since the last time you generated statements.
 - » Check **Minimum Balance to Output** to indicate that you want the system to print batches only for customers with a particular balance or greater. If you choose this option, be sure to type the minimum balance in the field below the check box.
- 5 Click **Execute**.
 - 6 You are reminded to load the statement forms into the printer. Click **OK**.

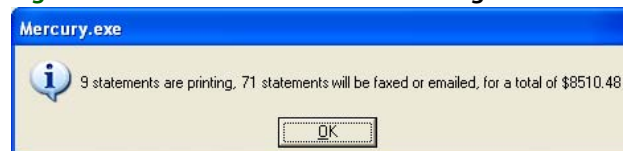
The system then displays the number of statements being printed, and the number of statements being faxed and e-mailed (combined) along with the total dollar amount billed.

NOTE

If you selected to print invoices with statements, and if you are configured to use the same printer for both statements and invoices, after the statements print you will be prompted to load invoice paper.

Click **OK**.

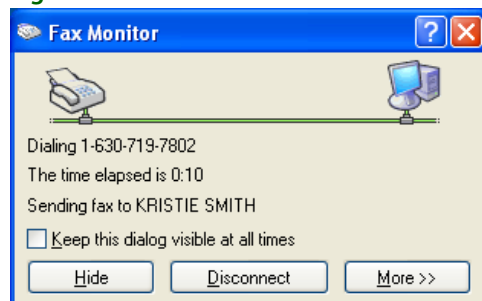
Figure 18-4: Number of Statements Being Printed/Sent



The statements begin to print, and the faxes and email messages are sent within a minute or so (if you selected to send NOW in Mercury Administration) or at the LATER time that you specified in Mercury Administration.

When the system begins sending faxes, you hear the system dial out and the Fax Monitor window displays:

Figure 18-5: Fax Monitor



This window displays each fax as it is dialing out and sending. It only takes a few seconds for a single fax to send, however if you are faxing several statements, expect it to take at least a few minutes to complete. You can click Hide to hide this window and work in other areas of the program; it is not necessary that you keep it open for the faxes to send.

See a sample printed statement below. If you generated statements using the All Stores option and a customer has transactions at multiple stores, the printed statement indicates at which store each transaction was completed. The product detail is followed by a slash (/), and then the store name is printed:

Figure 18-6: Sample Statement

Karen's Flower Shop
3113 Woodcreek Drive
DOWNERS GROVE, IL 60515

Leslie Anderson
802 Eagle Street
NAPERVILLE, IL 60563

STATEMENT DATE	ACCOUNT NO.
07/12/2005	0000011
PLEASE INDICATE AMOUNT PAID: \$	

PLEASE DETACH AND REMIT WITH PAYMENT

630-555-7668

ACCOUNT NO.
0000011

DATE	INV. NO./DESCRIPTION	PRODUCT AMOUNT	SERVICE CHARGE	RELAY CHARGE	DELIVERY CHARGE	Sales Tax	CREDITS	DUE ON ACCOUNT	BALANCE
07/12/2005	000026/1 Jennifer Laidley Local Delivery Fresh arrangement with bright colors / Karen's Flower Shop	69.00			7.00	5.18		81.18	81.18
07/12/2005	000027/1 Carry Out Gourmet Basket, chocolate heaven / Karen's Flower Shop	79.00				5.93		84.93	166.11
07/12/2005	000028/1 Barb Anderson Local Delivery Dozen Roses, Red with bb / Balloons, mylar happy bday / The Flower Garden	99.50				7.46		106.96	273.07
07/12/2005	000029/1 Carry Out Blooming Plants / The Flower Garden	50.00				3.75		53.75	326.82

326.82	0.00	0.00	0.00	326.82
CURRENT	30 DAYS PAST DUE	60 DAYS PAST DUE	OVER 90 DAYS	PLEASE PAY THIS AMOUNT Karen's Flower Shop

The name of the store that is currently logged in prints at the top of the statement.

Generating Invoices

You can also generate invoices only via the Generate Statements window. This prints completed invoices charged to house accounts with unpaid balances.

TASK

To generate invoices:

- 1 On the **Management** menu, click **Generate Statements**. The **Generate Statements** window opens.
- 2 In the **Store Name** field, highlight the store for which you wish to generate invoices, or select **All Stores** to generate invoices for all stores (the invoice run is consolidated and not associated with a particular store).
- 3 In the **Billing Cycle** field, highlight the cycle(s) for which you are generating invoices.
- 4 In the **Primary Sort** field, click the arrow and choose whether you wish to sort invoices by name (alphabetically), account number, billing cycle, or postal code.
- 5 In the **Secondary Sort** field, click the arrow and choose whether you wish to sort further according to billing cycle or postal code.
- 6 For the **Billing Method**, click **Invoice Billing**.
- 7 In the **Invoice Billing** area, select whether you want to print the invoices by **Delivery Date** or **Sale Date**. Select the **Start Date** and **End Date** for the run.
- 8 Click **OK**. Letter invoices are printed on the printer configured for letter invoice billing for tickets paid via house charge.

Generate Statements Window

The Generate Statements window allows you to generate customer statements (print, fax, or e-mail). Doing so regularly will help you maintain an even cash flow.

Figure 18-7: Generate Statements Window

The screenshot shows the 'Generate Statements' dialog box with the following settings:

- Criteria:**
 - Store Name: All Stores
 - Billing Cycle: Biweekly
 - Primary Sort: Name
 - Secondary Sort: Not Sorted
- Billing Method:**
 - Statement Billing
 - Invoice Billing
- Invoice Billing:**
 - Delivery Date
 - Sale Date
 - Start Date: 10/16/2008
 - End Date: 10/16/2008
- Statement Billing:**
 - Statement Date: 10/16/2008
 - Generate Finance Charges
- Promotional Message:** (Empty text area)

Buttons: OK, Cancel

Following are the fields in the Generate Statements window.

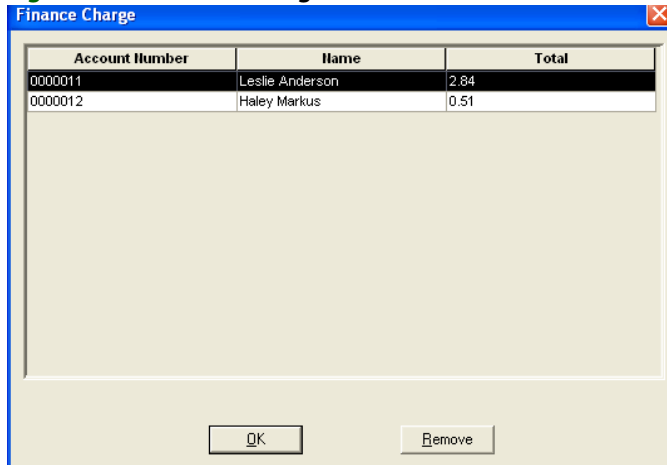
Table 18-2: Generate Statements Window Settings

Setting	Description
Store Name	Highlight the name of the store for which you want to generate statements, or select All Stores to generate statements for all of your stores.
Billing Cycle	Highlight the billing cycle(s) for which you want to generate statements.
Primary Sort	Click the down arrow and select whether you want statements to be printed numerically by account number, by billing cycle, alphabetically according to customer name, or numerically by postal code.
Secondary Sort	Click the down arrow and select whether you want to sort further according to billing cycle or postal code.
Billing Method	<p>Select either Statment Billing or Invoice Billing as the method. If you select Statement Billing, the Invoice Billing area is disabled. Likewise, if you select Invoice Billing, the Statement Billing area is disabled.</p> <p>NOTE: If you select Invoice Billing, only completed invoices charged to the house account with unpaid balances will be printed.</p> <p>Invoice billing causes FTD Mercury to print a letter-sized billing invoice to the default printer for all house charges in the date range selected.</p>
Invoice Billing	Select if you want to perform invoice billing by Delivery Date or Sale Date. Select the Start Date and the End Date for the statement run.
Statement Billing	Select the statement date.
Generate Finance Charge	Select this option if you want finance charges to be calculated on customer statements. (A window will appear after you click OK that will allow you to remove finance charges for individual customers.)
Promotional Message	Type any message text you would like to print on this batch of generated statements. This text box is limited to 123 characters.

Finance Charge Window

The Finance Charge window displays the customers that will receive finance charges for this batch of statements.

Figure 18-8: Finance Charges



Following are the fields in the Finance Charges window.

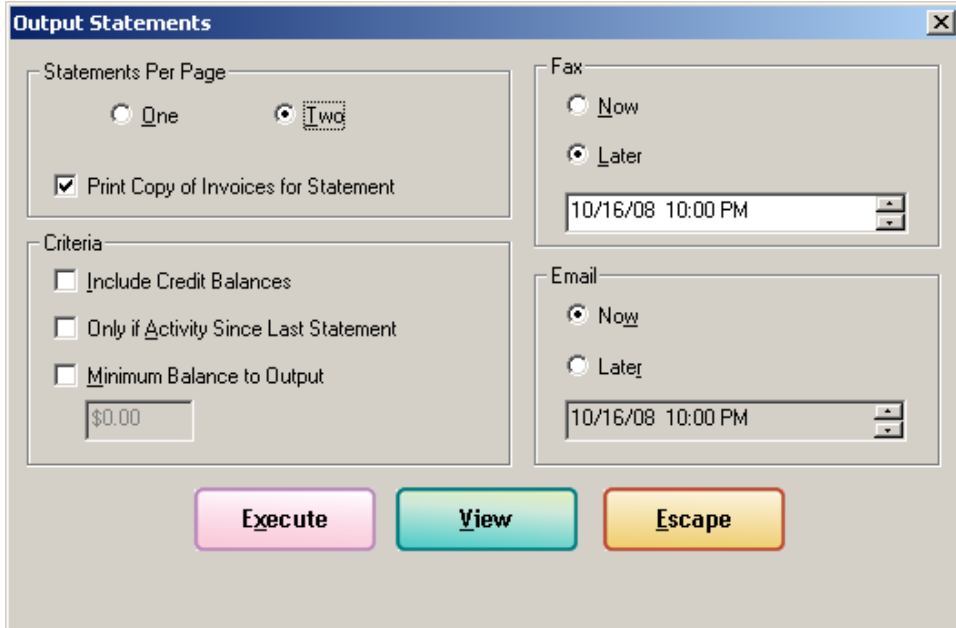
Table 18-3: Finance Charges Window Fields

Field	Description
Account Number	Account number of customers who will receive finance charges on the statement run.
Name	Name of customers who will receive finance charges on the statement run.
Total	Total finance charge that the customers will receive.

Output Statements Window

The Output Statements window allows you to print, e-mail, or fax your customer statements. Each time you generate statements, the Output Statements window will appear.

Figure 18-9: Output Statements Window



Following are the settings in the Output Statements window.

Table 18-4: Output Statements Window Settings

Setting	Description
Statements Per Page	Choose whether you wish your statements to be printed One per page (on 8.5" by 11" paper) or Two per page (on 8.5" by 14" paper).
Print Copy of Invoices for Statement	<p>Select this option to print copies of invoices included on the statement once the statement is printed. If you select this option, the statement includes the text "Invoices Enclosed" when you print.</p> <p>When you are outputting statements from the Statement tab of the Customer Detail Information window, this option is only available if the account has been configured to print invoices from the House Account tab.</p> <p>If you are outputting statements from a statement search, as long as at least one of the accounts is configured to print invoices, this option is available. However, only accounts configured to print invoices will output the invoices if you select this option. The same is true when generating statements from the Generate Statement window.</p>
Criteria	<p>Select criteria for which statements will be output:</p> <ul style="list-style-type: none"> » Click the Include Credit Balances check box so a check mark appears if you want statements with credit balances to be printed in this batch. » Click the Only if Activity Since Last Statement check box so a check mark appears if you want the system to look only at accounts with activity since the last time you printed statements. » Click the Minimum Balance to Print check box so a check mark appears if you want the system to print batches with a certain minimum balance and above. If so, be sure to type the minimum balance in the field below the check box.
Fax	Select if you would like to send faxes now (after statements are generated) or later. "Later" is the time you specified in FTD Mercury Administration Fax and Email screen.

Table 18-4: Output Statements Window Settings (cont.)

Setting	Description
Email	Select if you would like to send emails now (after statements are generated) or later. "Later" is the time you specified in FTD Mercury Administration Fax and Email screen.

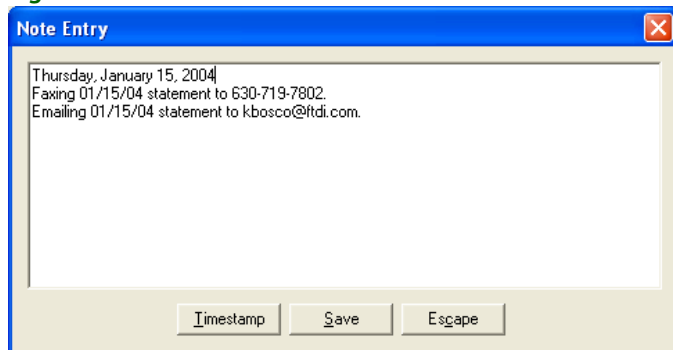
Generating Statements in Statement Search

If you want to fax or email a statement to a particular customer, you can do so in Statement Search. Look up the statement using a Statement Search, bring it up on the screen, then click the Output Statement button. The Output Statements window opens, allowing you to output statements.

Validating that Statements Were Emailed or Faxed

The best way to view the status of the faxes and email messages is through the Fax and Email Monitor. The Fax and Email Monitor lists all faxes and email messages (statements and delivery confirmations) that were sent via FTD Mercury. The Monitor allows you to view the status of faxes/ email messages as well as retry to send them or change the fax number/email address. See [Fax & Email Monitor Application](#) on page 22-1.

To verify that a statement was faxed or e-mailed to a particular customer, you can bring up that customer's account through a Customer Search and then click the Notes button to view notes. When statements are faxed and/or e-mailed to customers, note entries are made automatically in customer notes, noting the date and email address/fax number.

Figure 18-10: Statement Information in Customer Notes

Re-Printing/Re-Faxing/Re-Emailing Statements

If you need to re-print, re-fax, or re-email a statement to an individual customer, you can do so in two ways:

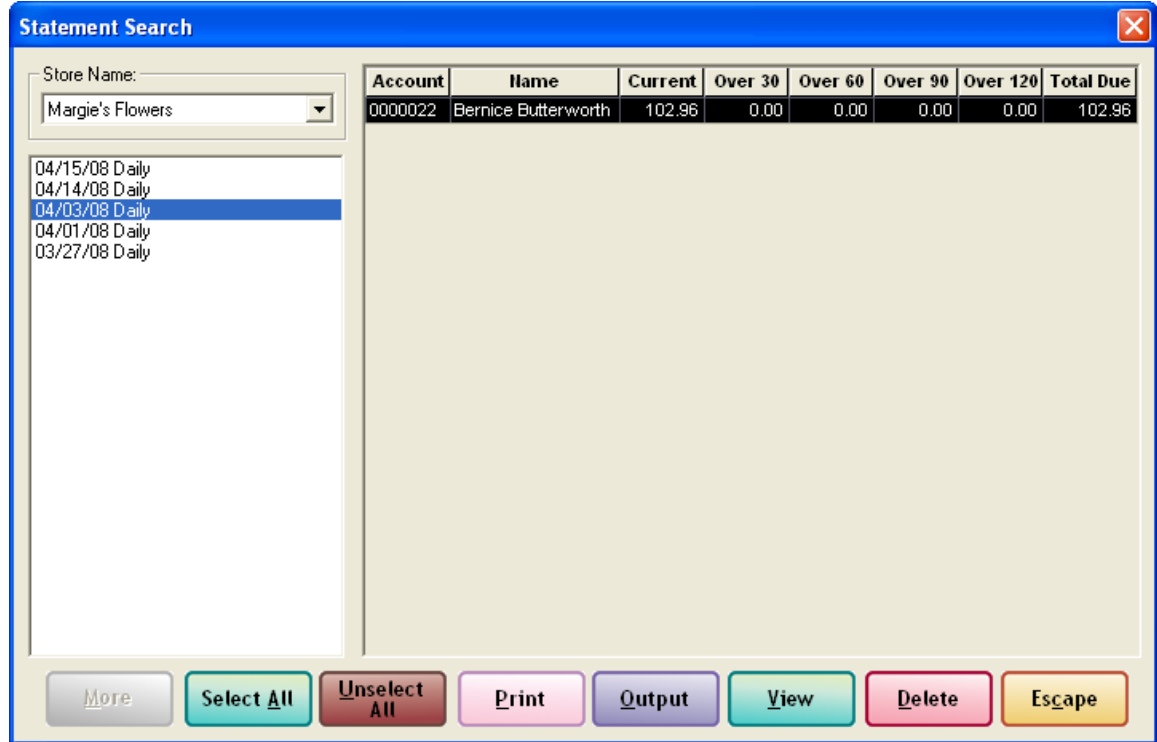
- » If a statement failed to fax or email for any reason, you can resend it in the Fax & Email Monitor. Just right-click on the fax (in the Fax tab) or email (in the E-mail tab) and select Retry (to retry the transmission with the same phone number/email address) or Change Fax Number/Change Email Address (to change the phone number/email address before resending). For more information, see [Resending a Fax](#) on page 22-4 for faxes or [Resending an Email Message](#) on page 22-4 for email messages.
- » To re-print, re-fax, or re-email a statement for any other reason, you can do so in Statement Search (in the menu bar click Search, then click Statements) or in the Statement tab in the Customer Detail Information window (locate the customer through a Customer Search, double-click on the customer, then click the Statement tab).

Highlight the statement run that contains the statement, highlight the statement, then click Output.

NOTE

To select multiple statements, hold the **CTRL** key while you click. Or, click the first statement, then hold the **SHIFT** key and click the last statement.

Figure 18-11: Output Statement in Statement Search



After highlighting the statement and clicking Output, the Output Statements window displays. Here you would specify your options and then click Execute to resend the statement (this is the same Output Statement window that you use when you generate statements – see [Generating Statements](#) on page 18–12 for more information).

Searching for Statements

All statements that have been generated from your store are available to view through the statement search feature. To view statements generated for a particular customer, see [Customer Statement History](#) on page 7–35.

TASK

To perform a Statement Search:

- 1 On the **Search** menu, click **Statement Search**. The **Statement Search** window opens.
- 2 In the **Store Name** field, you have the option to search for statements for **All Stores**, or you can select the individual store name to see the statement runs only for that particular store.
- 3 In the left text box, click on the generated statement date/cycle that you want to search through, and the statements display. You may double-click on a customer's name in the text box on the right or press the **SPACEBAR** when the customer's name is highlighted to view that customer's statement details. To view multiple statements, highlight those statements with your mouse and then click **View**. Click **Delete** if you wish to delete the entire statement run.

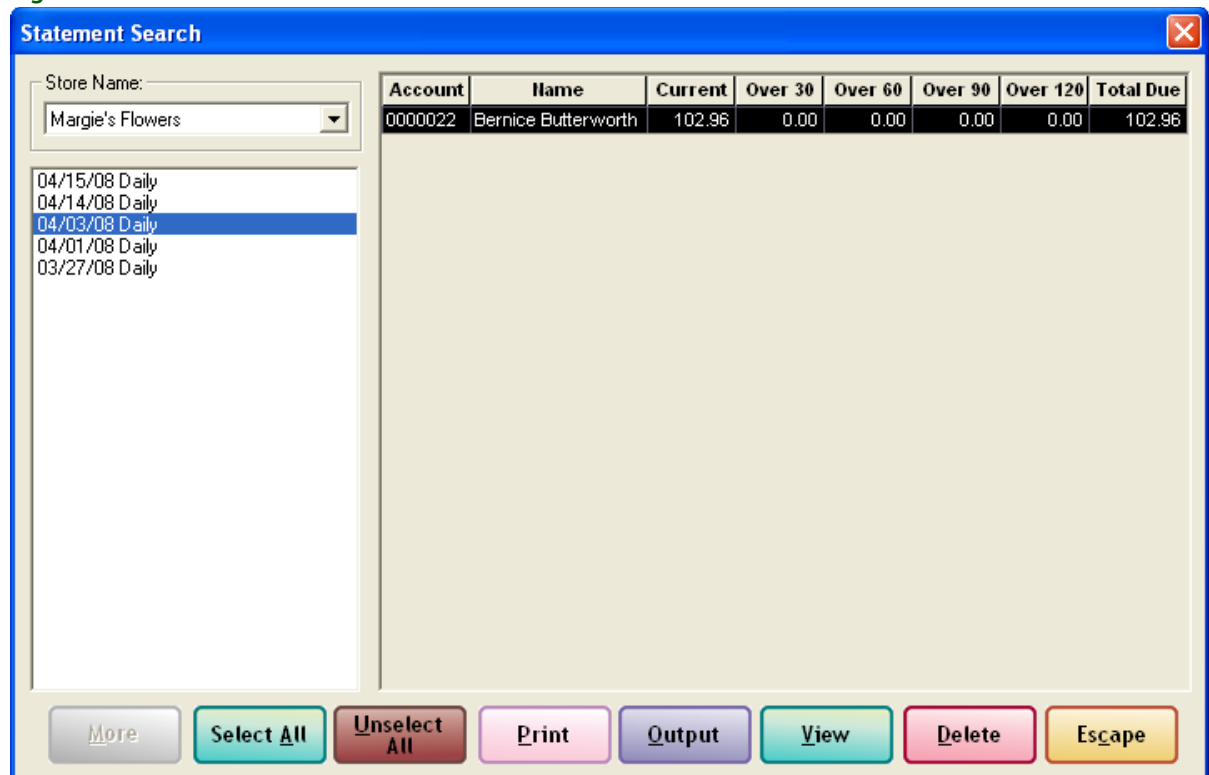
NOTE If you must regenerate statements, be sure to delete the first statement run. If you do not delete the first statement run, no order detail will appear in the regenerated run. Instead, only the balance forward balance will display.

To print, fax, or email a statement, highlight the statement and then click **Output**. See [Re-Printing/Re-Faxing/Re-Emailing Statements](#) on page 18–19 for more information.

Statement Search Window

The **Statement Search** window is used to look for customer statement detail information. You may only search for previously generated statements.

Figure 18-12: Statement Search Window



The following are the fields in the Statement Search window.

Table 18-5: Statement Search Window Fields

Field	Description
Store Name	Name of the store where you will search for generated statements. Your store name is listed by default. If you have multiple stores, select All Stores or click the down arrow and select the name of the store where you will search for statements.
Generated Statement Dates	Dates on which statements were generated for the selected store. Click on the statement date/cycle that you would like to search through. The statements generated for that date/cycle will display to the right.
Statements Area	Shows the account number, name, and balances for statements generated on the selected statement date. To view details for a specific statement, highlight the statement in the list and click View.

View Statements Window

The **View Statements** window allows you to view an individual's statement. This window displays a list of the customer's tickets and the charge for each ticket as well as this customer's current, 30, 60, 90, and 120-day balance.

Figure 18-13: View Statements Window

The screenshot shows the 'View Statements' window with the following details:

- Customer Information:** Bernice Butterworth, 832 Wisconsin Avenue, OAK PARK, IL 60304, 203-123-45667.
- Statement Date:** 04/03/08
- Account Number:** 0000022

Date	Description	Amount	Service	Relay	Delivery	Sales Tax	Credits	Charge	Balance
03/28/08	000446/1 New Life Churc	59.99			5.00	3.90		68.89	68.89
04/01/08	000470/1 Carry Out The	31.99				2.08		34.07	102.96

pay on time please
We Appreciate Your Business!

Current	Over 30	Over 60	Over 90	Over 120	Balance Due:
102.96	0.00	0.00	0.00	0.00	102.96

Buttons: Previous, Next, Output, Close

Click **Close** when you have finished viewing this customer's statement.

Order Entry Item Window

The Order Entry Item window is used to set tax code information for a specific item in an order. Additionally, this window enables you to change the product information you have in your product database (although you can already change it in the product grid in Order Entry and Point of Sale), including entering a longer description for an item.

Figure 18-14: Order Entry Item Window

IMPORTANT The Designer field is always inactive; set the Designer for the order in the Design Center window.

You can access the Order Entry Item window by double-clicking on the value in the Product Code column for the item in Order Entry, Point of Sale, or the Credit/Debit Memo window.

Canadian vs. U.S. Dollars

For Canadian systems, you can enter the product amount in either U.S. or Canadian dollars. If the value is in U.S. dollars, select US from the Exchange list. FTD Mercury automatically converts the product amount from U.S. dollars to Canadian dollars based on the exchange rates set in Mercury Administration.

- » If you have already selected a wire out delivery zone, FTD Mercury uses the wire exchange rate.
- » If you have selected a local delivery zone, or have yet to select a delivery zone, FTD Mercury uses the local exchange rate.
- » If you accessed the Order Entry Item window from the Credit/Debit Memo window, FTD Mercury uses the local exchange rate.

Credit/Debit Memo Window

The Credit/Debit Memo window is used to create credit and debit memos.

Credit/Debit Window Tasks

- » [Creating Credit Memos](#) on page 18–25
- » [Creating Debit Memos](#) on page 18–25

Figure 18-15: Creating a Credit Memo

The screenshot shows the 'Credit/Debit Memo' window with the following settings:

- Radio Buttons:** Debit Memo, Credit Memo
- Customer:** American Floral Services, Inc. (with a search button '...')
- Address:** P.O. Box 12309, OKLAHOMA CITY, OK 73157
- Tax Exempt Number:** XXXXXX
- Ordered By:** (empty text field)
- Store Name:** Margie's Flowers (dropdown menu)
- Ticket Date:** 4 / 3 /2008 (dropdown menu)
- Reference:** (empty text field)

Product Code	Qty	Description	Amount	Discount	Extension	(-)
FTD AB	1	The FTD Anniversary Bouquet	\$ 59.99	0%/\$0.00	\$ 59.99	<input type="checkbox"/>
	1		\$ 0.00	0%/\$0.00	\$ 0.00	<input type="checkbox"/>

Summary Totals:

- Sub. Total: \$59.99
- Sales Tax: \$0.00
- Total: \$59.99
- Batch Mode

Buttons: Save, Escape

Following are the settings in the Credit/Debit Memo window.

Table 18-6: Credit/Debit Memo Window Settings

Setting	Description
Debit Memo/Credit Memo	Select the type of ticket you wish to create.
Customer	Name of the customer for whose account you are creating the credit or debit memo. Type the customer's name, or click the search button to search for the customer's name. If this is a new customer, you will be able to click Add and add the customer's information into your system.
Ordered By	Leave this field blank
Store Name	Name of the store where you will enter the credit or debit memo. Your store name is listed by default. Click the down arrow and select the name of another the store.
Ticket Date	Date of the credit or debit memo. Click the down arrow to reveal a calendar.
Reference	Enter a notation about the credit or debit memo to identify the ticket. The contents of the Reference field appear on the customer's statement.
Product Grid	Use the product grid area to select the product code, quantity, amount, and discount for the item(s) in the credit/debit memo.
Batch Mode	Click this check box so a check mark appears if you wish this window to remain open so you can create several credit or debit memos.

Credit and Debit Memos

Credit memos allow you to apply credit toward a customer's house account. You may need to apply the credit if a customer returns an item purchased on a house account. Debit memos allow you to apply a debit toward a customer's house account. You may need to apply the debit to add a miscellaneous charge onto the customer's house account.

Creating Credit Memos

You may need to apply a credit to a customer's account if the customer returns an item purchased on the house account. Credit memos enable you to do so.

TASK To create a credit memo:

- 1 On the **Management** menu, click **Credit/Debit Memo**. The **Credit/Debit Memo** window opens.
- 2 Select the **Credit Memo** option.
- 3 In the **Customer** field, enter the customer's name and press **TAB** so that the system can locate the customer's information, or click ... to perform a **Customer Search**. To add a new customer, click **Add**.
- 4 Leave the **Ordered By** field blank.
- 5 By default, your store name appears in the **Store Name** field. If you have multiple stores, click the down arrow and select the name of the store for which you are creating this memo.
- 6 In the **Ticket Date** field, click the down arrow to reveal a calendar. Click on the date of the credit memo.
- 7 Information entered into the **Reference** field will print onto the customer's statements. For example, you may choose to type the ticket number to which this credit memo corresponds or the order recipient's name.
- 8 In the **Product Code** column, type the product code(s) for which this customer is receiving credit and press **TAB**, or click ... to perform a **Product Search**.
- 9 Enter how many of each product is being credited in the **Qty** column and press **TAB**. Each product's description, amount, and extension (final cost of the product) will fill in automatically. If this customer receives a discount, you must type the discount in the **Discount** field. The correct tax amount will fill in automatically.
- 10 Click the **Batch Mode** check box so a check mark appears if you wish this window to remain open so you may create several credit memos.
- 11 Click **Save**.

Creating Debit Memos

You may need to add another charge on to a customer's house account. Debit memos enable you to do so.

TASK To create a debit memo:

- 1 On the **Management** menu, click **Credit/Debit Memo**. The **Credit/Debit Memo** window opens.
- 2 Select the **Debit Memo** option.
- 3 In the **Customer** field, enter the customer's name and press **Tab** so that the system can locate the customer's information, or click ... to perform a **Customer Search**. To add a new customer, click **Add**.
- 4 Leave the **Ordered By** field blank.
- 5 By default, your store name appears in the **Store Name** field. If you have multiple stores, click the down arrow and select the name of the store for which you are creating this memo.

- 6 In the Ticket Date field, click the down arrow to reveal a calendar. Click on the date of the debit memo.
- 7 Information entered into the Reference field will print onto the customer's statements. For example, you may choose to type the ticket number to which this debit memo corresponds or the order recipient's name.
- 8 In the Product Code column, type the product code(s) for which this customer is being debited and press **TAB**, or click ... to perform a Product Search.
- 9 Enter how many of each product is being debited in the Qty column and press **TAB**. Each product's description, amount, and extension (final cost of the product) will fill in automatically. If the customer receives a discount, you must enter the discount in the Discount field. The correct tax amount will fill in automatically.
- 10 Click the Batch Mode check box so a check mark appears if you wish this window to remain open so you may create several debit memos.
- 11 Click Save.

Business Reports

FTD Mercury allows you to generate several different reports to assist you in the daily operations of your shop. In addition to financial reporting functionality, the reports in this section are designed as business management tools. Each report is generated using a Microsoft Excel template.

This section is designed to educate you on all of the reports that are available to generate from the program and how to customize each report for the unique needs of your store. This section helps you understand the purpose of each report, how to access and print each report, and contains an example of each report.

Using Business Report Templates

IMPORTANT This section discusses templates for business reports. For information on Marketing templates (standard templates and templates used with the Mercury Marketing module), see [Mercury Marketing](#) on page 15–1.

FTD Mercury includes several Microsoft Excel and Microsoft Word templates that help you generate reports, letters, and mailing labels. Templates eliminate the need for setting up the format of these documents; they contain all the formatting and text that you need to generate these documents. All you need to do is click on the template, specify what type of information you want to include, and your letters, reports, and labels are generated for you automatically. The system retrieves information from your store's database to generate each type of report. Once the report is displayed on your screen, you can save or print it.

IMPORTANT In order to use Business Reports, you must have full access to Reports in Mercury Administration. You can control employee access to Business Reports based on employee types. For more information, see [Window Access Screen](#) on page 24–57.

You may use the following methods to access your FTD Mercury templates.

From Within FTD Mercury

TASK To access FTD Mercury templates from the FTD Mercury Main Menu:

- 1 Click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click the name of the report you want to generate.
- 4 If you receive a security warning about the template containing macros, click **Enable Macros**. This is normal and the macros are required to generate the report or letter.

From Within Microsoft Word or Microsoft Excel

TASK To access FTD Mercury templates from within Microsoft Word or Microsoft Excel:

- 1 Either open Microsoft Word (for letters) or Microsoft Excel (for reports).
- 2 On the **File** menu, click **New**.
- 3 In the New Document pane (Word) or the New Workbook pane (Excel) on the right side of the screen, click **On my computer**.
- 4 In the **Templates** window, click the **Mercury Forms** tab.
- 5 Double-click the template you want to open.
- 6 If you receive a security warning about the template containing macros, click **Enable Macros**. This is normal and the macros are required to generate the report or letter.
- 7 Depending on the report or letter, you may have to configure one or more windows to set necessary options for the report or letter (such as a date range).
- 8 Click **Finish** to generate the report or letter.

List of Business Reports

FTD Mercury provides the following business reports:

- » [Abbreviated Customer Master List with Balance Report](#)
- » [Abbreviated Customer Master List with Days Late Report](#)
- » [Aged Analysis Reports](#)
- » [Business Snapshot Report](#)
- » [Credit Card Settlement History Report](#)
- » [Customer Account Payment Report](#)
- » [Customer Master List](#)
- » [Employee Analysis Report](#)
- » [Employee Sales Report](#)
- » [Message Report](#)
- » [Payment Type Totals Report](#)
- » [Product Comparison Report](#)
- » [Product Sales Reports](#)—There are several variations on this report:
 - » [List of Product Codes Summary Report](#)
 - » [List of Product Codes Detail Report](#)
 - » [Sales by Product Code Summary Report](#)
 - » [Sales by Product Code Detail Report](#)
 - » [Product Sales Report by Date by Occasion by Product Summary Report](#)
 - » [Product Sales Report by Date by Occasion by Product Detail Report](#)
- » [Reciprocity Report](#)
- » [Report of Orders Filled](#)
- » [Sales by Referral Code Report](#)
- » [Sales Summary Report](#)
- » [Sales Tax Report](#)

- » [Standing Order Log Detail Report](#)
- » [Standing Order Log Summary Report](#)
- » [Tax Exempt Customer Report](#)
- » [Ticket Report](#)
- » [Wire Reconciliation Report](#)
- » [Wire Service Incoming/Outgoing Report](#)

Abbreviated Customer Master List with Balance Report

The **Abbreviated Customer Master List with Balance** report provides you with a list of all your customers as well as their current balance totals. You can select particular payment types to include in the report, or all payment types. This report is particularly useful for stores with many customers that wish to have abbreviated customer information on hand. For a longer customer report with more detailed information, see the [Customer Master List](#) on page 19–22.

Figure 19-1: Abbreviated Customer Master List with Balance Report

Abbreviated Customer Master List with Balance										
Leslie's Flowers and Gifts										
Sort by Customer Name										
Selected Cash, Credit, House, Check, Debit, Gift Certificate										
Marketing criteria: Account Type (Personal)										
Account No	Name	Address	City	State	Zipcode	Phone Number	Status	Balance		
BrownJo	John Brown	465 Fairfield Dr.	WHEATON	IL	60187	(630)780-0212	A	0.00		
CarreLi	Linda Carrey	230 Main Street	WHEATON	IL	60187	(630)780-9000	A	- 12.00		
JonesPa	Paul Jones	46 Park Blvd.	LISLE	IL	60532	(630)555-4241	A	0.00		
MaysCa	Carrie Mays	145 Peachtree Rd.	NAPERVILLE	IL	60563	(630)555-0981	A	105.75		
MilleCh	Chris Miller	993 Jaipur	NAPERVILLE	IL	60560	(630)555-2010	A	0.00		
RodriJo	Joe Rodriguez	1929 Checker Rd	AURORA	IL	60504	(630)555-8890	A	48.52		
ScanlMe	Melissa Scanlon	3489 Woodcreek	AURORA	IL	60503	(630)555-8573	A	0.00		
SkobeCa	Carol Skobel	776 McHenry Rd	WESTMONT	IL	60537	(630)555-8902	A	0.00		
SmithKr	Kristie Smith	555 Pine Street	GLEN ELLYN	IL	60137	(630)790-8900	A	55.95		
WhiteHo	Hollie White	5W310 Forest	WESTMONT	IL	60537	(630)555-8639	A	0.00		
Count:							10	Total:		198.22

Generating the Abbreviated Customer Master List with Balance Report

TASK To generate the **Abbreviated Customer Master List with Balance** report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Abbreviated Customer Master with Balance** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 If you receive the message "This application is about to initialize ActiveX controls..." click **OK**.

- 6 In the **Store of Origin** field, click the arrow and select the store's data that you want to use for the report.
- 7 In the **Please select payment type** section, click in the check boxes so check marks appear for any combination of payment types you wish to include in this report.
- 8 If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See [Marketing Screen](#) on page 24–21 for information on setting up these categories.)
To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.
To print only customers with **no marketing information specified** in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.
- 9 In the **Sort Option** section, choose whether you wish to list customers according to **Default Pay Method, Last Purchase Date, or Name**. If you select to sort by last purchase date, specify the last purchase date by clicking the down arrow in the date field and selecting the date from the calendar.
- 10 If you want to only display open item customers with available credit not allocated to unpaid tickets, select the check box so that a check mark appears.
- 11 Click **Finish**. The report generates and opens in Excel.
- 12 To print your report from Excel, on the **File** menu, click **Print**.
- 13 If you want to save the report from Excel, on the **File** menu, click **Save**.

Abbreviated Customer Master List Window

The **Abbreviated Customer Master List** window enables you to configure settings for the Abbreviated Customer Master List with Balance and the Abbreviated Customer Master List with Days Late reports.

Figure 19-2: Abbreviated Customer Master List Window

The Abbreviated Customer Master List window contains the following settings.

Table 19-1: Abbreviated Customer Master List Window Settings

Setting	Description
Store of Origin	From this list, select the store with which the customer is associated. If you have multiple stores, you can select All Stores.
Payment Types	Select the payment type(s) you want to include in the report. You can select Cash, Check, Credit, Debit, House, or Gift Certificate.
Marketing Criteria Selection	If you select this option, you can filter the report so it includes customers with specific marketing criteria or no marketing criteria. If you select Customers with Marketing Criteria, you can select the marketing categories to include.
Sort Option	You can select to sort the report by the Default Pay Method, the Last Purchase Date (requires you specify the date), or by Name.
Open Item Customers with Credit	This option is only available for the Abbreviated Customer Master List with Balance Report. You can check this box to display open item customers with available credit not allocated to unpaid tickets.

Abbreviated Customer Master List with Days Late Report

The **Abbreviated Customer Master List with Days Late** report provides you with a list of all your customers as well as the number of days their payments are late. It is particularly useful if you have

many customers and you wish to have abbreviated customer information on hand. For a longer customer report with more detailed information, see the [Customer Master List](#) on page 19–22.

Figure 19-3: Abbreviated Customer Master List with Days Late Report

Abbreviated Customer Master List with Days Late								
Leslie's Flowers and Gifts								
Sort by Customer Name								
Selected Cash, Credit, House, Check, Debit, Gift Certificate								
Marketing criteria: Account Type (Personal)								
Account No	Name	Address	City	State	Zipcode	Phone Number	Status	# Late
BrownJo	John Brown	465 Fairfield Dr.	WHEATON	IL	60187	(630)780-0212	A	0
CarreLi	Linda Carrey	230 Main Street	WHEATON	IL	60187	(630)780-9000	A	0
JonesPa	Paul Jones	46 Park Blvd.	LISLE	IL	60532	(630)555-4241	A	0
MaysCa	Carrie Mays	145 Peachtree Rd.	NAPERVILLE	IL	60563	(630)555-0981	A	60
MilleCh	Chris Miller	993 Jaipur	NAPERVILLE	IL	60560	(630)555-2010	A	0
RodriJo	Joe Rodriguez	1929 Checker Rd	AURORA	IL	60504	(630)555-8890	A	30
ScanlMe	Melissa Scanlon	3489 Woodcreek	AURORA	IL	60503	(630)555-8573	A	0
SkobeCa	Carol Skobel	776 McHenry Rd	WESTMONT	IL	60537	(630)555-8902	A	0
SmithKr	Kristie Smith	555 Pine Street	GLEN ELLYN	IL	60137	(630)790-8900	A	30
WhiteHo	Hollie White	5W310 Forest	WESTMONT	IL	60537	(630)555-8639	A	0
Count:								10

Generating the Abbreviated Customer Master List with Days Late

TASK To generate the Abbreviated Customer Master List with Days Late:

- 1 On the FTD Mercury Main Menu, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Abbreviated Customer Master with Days Late** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 If you receive the message "This application is about to initialize ActiveX controls..." click **OK**.
- 6 In the **Store of Origin** field, click the arrow and select the store's data that you want to use for the report.
- 7 In the **Please select payment type** section, click in the check boxes so check marks appear for any combination of payment types you wish to include in this report.
- 8 If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See [Marketing Screen](#) on page 24–21 for information on setting up these categories.)
To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.
To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.
- 9 In the **Sort Option** section, choose whether you wish to list customers according to **Default Pay Method**, **Last Purchase Date**, or **Name**. If you select to sort by last purchase date, specify the

last purchase date by clicking the down arrow in the date field and selecting the date from the calendar.

- 10 Click **Finish**. The report generates and opens in Excel.
- 11 To print your report from Excel, on the **File** menu, click **Print**.
- 12 If you want to save the report from Excel, on the **File** menu, click **Save**.

Aged Analysis Reports

The **Aged Analysis** reports provide you with an analysis of your house account balances. The report includes only those accounts with balances for the selected store(s) and reporting period.

Aged Analysis reports contain account balances and aging on accounts from the sale date relative to the date you generate the report. Aging is calculated nightly. You can use Aged Analysis reports to view potential future cash flow, see how much customers owe, and decide what steps you need to take to recoup money that you are owed. To assist your collection efforts, Aged Analysis detail and summary reports include customers' phone numbers. You will typically generate Aged Analysis reports monthly, either just before or just after you create statements. By printing each month's Aged Analysis report, you can review account aging for a previous month or look up a customer's balance when access to a terminal is not possible.

NOTE

To view aging as of a statement date, use Statement Search. In the Search menu, click Statement Search. Highlight the statement run and click Print. The Statement List report that displays contains the aging for the account as of the selected statement run.

You can generate Aged Analysis reports for balance forward or open item accounts at individual stores or at all stores. You may sort detail and summary reports according to customer ID, sale date, or sort name. By default, the Aged Analysis reports set the Balance Forward date one month prior to the current date. By setting the Account Balance date later than the Balance Forward date, you can include future transactions in the Aged Analysis report.

The three types of aged analysis reports are:

- » **Detail Report** - lists each customer that has an open balance, as well as each individual transaction for the customer that occurred after the balance forward date. The report also prints the ticket number, product code(s) for each transaction, purchase date, and customer balance. Grand totals (for current, 30, 60, 90, 120+ days, and future, if selected) for each store are printed at the bottom of the report.
- » **Summary Report** - lists each customer name and phone number, and the current, 30, 60, 90, 120+, and future balances (if selected) for each customer. Individual transactions are not listed.
- » **Grand Total Report** - does not list individual customers. Total amounts for all customers are listed, separated by current, 30, 60, 90, 120+, and future balances.

Figure 19-4: Aged Analysis Report - Detail

Aged Analysis Report								
MARGIE'S FLOWERS								
Detail								
Customer Type: Balance Forward, Open Item Print Order By: Customer ID								
Balance Forward Date: 02/05/08 Account Balance as of: 03/06/08								
Cust No. Ticket #	Customer Name Sale Date	Phone No. Del Date	Days Late Transaction Type	Last Payment Date Prod Code	Accounting Type Prod Description	Tax Code	Total Amt	Acct Balance
0000104	FLOWERS BY NAOMI 02/05/2008	(555)555-5555	0	11/01/2007	Balance Forward		-78.50	-78.50
Totals:	Current: -78.50	30 Days: 0.00	60 Days: 0.00	90 Days: 0.00	120+ Days: 0.00	Future	0.00	-78.50
0000106	CASCADE 02/05/2008	(555)555-5555	126		Balance Forward		135.00	135.00
Totals:	Current: 0.00	30 Days: 0.00	60 Days: 0.00	90 Days: 0.00	120+ Days: 135.00	Future	0.00	135.00
0000107	LEWIS ANIMAL CLINIC 02/05/2008	(555)555-5555	30		Balance Forward		84.99	84.99
Totals:	Current: 0.00	30 Days: 84.99	60 Days: 0.00	90 Days: 0.00	120+ Days: 0.00	Future	0.00	84.99
Grand Total:	Current: -78.50	30 Days: 84.99	60 Days: 0.00	90 Days: 0.00	120+ Days: 135.00	Future	0.00	141.49
% of Grand Total:	-55.4%	60.0%	0.0%	0.0%	95.4%	0.0%	0.0%	

The detailed Aged Analysis report contains the following information.

Table 19-2: Aged Analysis Detail Report Columns

Column	Description
Customer No.	The account number of the customer with aged balance(s).
Customer Name	Name of the customer with aged balance(s).
Phone Number	Phone number of the customer with aged balance(s).
Days Late	Aging bucket or days late of the customer's oldest transaction. If the oldest transaction is less than 120 days old, Days Late will show the aging bucket of the transaction (30 = transactions 30-60 days old; 60 = transactions 61-90 days old; or 90 = transactions 91-120 days old). For transactions 121 days and older, Days Late shows the actual days late.
Last Payment Date	Date on which the last payment was entered for the customer account.
Accounting Type	Indicates whether the customer's account is set up as a balance forward or open item account.
Ticket #	Number associated with an order.
Sale Date	Date of the ticket.
Del Date	Scheduled delivery date.
Transaction Type	Type of transaction. Transactions with balances prior to the Balance Forward date appear with transaction type of Balance Forward. If you generate the Aged Analysis report after running statements you may see Transaction Type of Finance Charge.
Product Code	Code for the product.
Product Description	Product name.
Tax Code	Tax code associated with the transaction.
Total Amount	Total amount for the transaction.

Table 19-2: Aged Analysis Detail Report Columns (cont.)

Column	Description
Acct Balance	Running total of the transaction total amounts for the customer.

Figure 19-5: Aged Analysis Report - Summary

Aged Analysis Report MARGIE'S FLOWERS Summary Customer Type: Balance Forward, Open Item Print Order By: Customer ID Account Balance as of: 03/06/08										
Cust No.	Customer Name	Phone No.	Last Payment	Current	30 Days	60 Days	90 Days	120+ Days	Future	Balance
0000104	FLOWERS BY NAOMI	(555)555-5555	11/01/2007	-78.50	0.00	0.00	0.00	0.00	0.00	-78.50
0000106	CASCADE	(555)555-5555		0.00	0.00	0.00	0.00	135.00	0.00	135.00
0000107	LEWIS ANIMAL CLINIC	(555)555-5555		0.00	84.99	0.00	0.00	0.00	0.00	84.99
Grand Total:				-78.50	84.99	0.00	0.00	135.00	0.00	141.49
% of Grand Total				-55.4%	60.0%	0.0%	0.0%	95.4%	0.0%	

Figure 19-6: Aged Analysis Report - Grand Total

Aged Analysis Report MARGIE'S FLOWERS Grand Total Customer Type: Balance Forward, Open Item Account Balance as of: 03/06/08							
	Current	30 Days	60 Days	90 Days	120+ Days	Future	Balance
Grand Total:	-78.50	84.99	0.00	0.00	135.00	0.00	141.49
% of Grand Total	-55.4%	60.0%	0.0%	0.0%	95.4%	0.0%	

Generating Aged Analysis Reports

TASK To generate Aged Analysis reports:

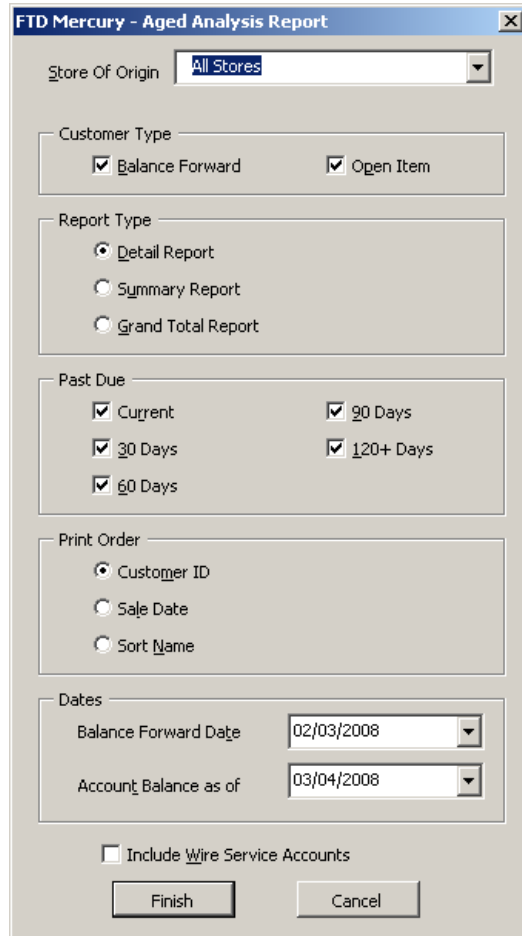
- 1 On the FTD Mercury Main Menu, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Aged Analysis Report** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 In the **Store of Origin** field, click the arrow and select the store's data that you want to use for the report.
- 6 In the **Customer Type** section, select which customers' information that you want to view, **Balance Forward, Open Item**, or both.
- 7 In the **Report Type** section, select the type of report that you want to print. See the information at the beginning of this section for the descriptions of the report types.
- 8 In the **Past Due** section, select the past due accounts that you want to view. You can choose accounts that are current (up-to-date) or accounts that are 30, 60, 90, and/or 120+ past due.
- 9 In the **Print Order** section, select how you want to sort the printing order of the data records. You can sort the records by **Customer ID**, **Sale Date**, or **Sort Name** (customer name).
- 10 In the **Balance Forward Date** field, click the arrow and select the balance forward date of the customers that you want to print.
- 11 In the **Account Balance as of** field, click the arrow and select the date for calculating aging. Setting the Account Balance as of date later than the current date allows you to include future transactions in the Aged Analysis report.
- 12 Select **Include Wire Service Accounts** only if you want to include wire service accounts (FTD, TEL, etc.) in the report.
- 13 Click **Finish**. The report generates and opens in Excel.

- 14 To print your report from Excel, on the **File** menu, click **Print**.
- 15 If you want to save the report from Excel, on the **File** menu, click **Save**.

Aged Analysis Report Window

The **Aged Analysis Report** window allows you to configure settings for the Aged Analysis report. When you have finished configuring the settings, click **Finish** to generate the report and open it in Microsoft Excel.

Figure 19-7: Aged Analysis Report Window



The Aged Analysis Report window contains the following settings.

Table 19-3: Aged Analysis Report Window Settings

Setting	Description
Store of Origin	Select the store with which this customer is associated. If you are set up as a multi-store shop, you can also select All Stores.
Customer Type	Select whether you want to include customers with Balance Forward accounts, customers with Open Item accounts, or both.
Report Type	Select whether you want to generate a Detail Report, a Summary Report, or a Grand Total Report.
Past Due	Select criteria for including customers. You can select any combination of customers who are current, 30 days past due, 60 days past due, 90 days past due, and/or 120+ days past due.

Table 19-3: Aged Analysis Report Window Settings (cont.)

Setting	Description
Print Order	Select the print order for the report. You can select Customer ID, Sale Date, or Sort Name.
Balance Forward Date	If you are including customers with balance forward accounts, select the date for the balance forward accounts you want to include.
Account Balance as of	Date equal to or later than the date on which you are running the report. Setting this date later than the date of the report allows you to include future transactions in the report.
Include Wire Service Accounts	Select this box if you want to include wire service accounts (FTD, TEL, etc.) in this report.

Business Snapshot Report

The **Business Snapshot** report is a tool that gives you an immediate analysis of what is going on in your business for a given day or date range. You can generate Business Snapshot reports for individual stores or for all stores. Business Snapshot reports give you a quick look at the activity in your business for the reporting period. For example, you could generate the Business Snapshot report in the morning to see how heavy your delivery schedule for the day will be. You can also get an idea of your staffing needs throughout a day by tracking various types of sales by hour. Since Business Snapshot reports include cancelled, pending, and incomplete sales, the information in Business Snapshot should not be used to balance completed sales. For balancing purposes, refer to the [Sales Summary Report](#) on page 19–50.

Business Snapshot includes four reports--**Sales Analysis**, **Delivery Analysis**, **Product Analysis**, and **Wire Analysis**--in a single Excel file.

- » **Sales Analysis** - summarizes number and dollar value of sales for the reporting period by type of order, payment method, and time of day for sales entered in Order Entry and Point of Sale. You can use this report to see what your sales are.
- » **Delivery Analysis** - summarizes the number and dollar value of deliveries scheduled for the reporting period by their workflow status. You can use this report as an overview of your delivery schedules and delivery staffing needs.
- » **Product Analysis** - summarizes the number and dollar value by product categories and individual products for deliveries scheduled for the reporting period. You can use this report as an overview of how the sales in the reporting period will affect your inventory.
- » **Wire Analysis** - summarizes the number and dollar values for each wire service of incoming and outgoing wire sales attached in Order Entry and Point of Sale.

To navigate between reports, click tabs at the bottom of the screen. To print all four reports at once, you must select Entire workbook in the Excel print dialog box.

Sales Analysis

The **Sales** tab displays by default. This tab displays the **Sales Analysis** report.

Figure 19-8: Business Snapshot – Sales Analysis Report

	Order Entry/Manual		POS		Total		Average
	Count	Total	Count	Total	Count	Total	
Order Summary							
DELIVERY ORDERS	3	\$218.44	1	\$83.95	4	\$302.39	\$75.60
CARRY OUT ORDERS	0	\$0.00	1	\$12.50	1	\$12.50	\$12.50
PICKUP ORDERS	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
INCOMING WIRE ORDERS	10	\$555.95	1	\$43.00	11	\$598.95	\$54.45
OUTGOING WIRE ORDERS	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
STORE TOTAL	13	\$774.39	3	\$139.45	16	\$913.84	\$57.12
Sales Pay Method							
CASH SALES	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
HOUSE CHARGE SALES	3	\$193.43	0	\$0.00	3	\$193.43	\$64.48
MANUAL TICKET SALES	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
DEBIT MEMOS	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
CREDIT MEMOS	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
CREDIT CARD SALES	1	\$75.00	2	\$96.45	3	\$171.45	\$57.15
DEBIT CARD SALES	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
GIFT CERTIFICATES	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
GIFT CARDS	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
INCOMING WIRE SALES	9	\$505.96	1	\$43.00	10	\$548.96	\$54.90
STORE TOTAL	13	\$774.39	3	\$139.45	16	\$913.84	\$57.12
Sales By Hour							
12:00 AM 1:00 AM	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
1:00 AM 2:00 AM	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
2:00 AM 3:00 AM	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
3:00 AM 4:00 AM	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00

The Sales Analysis report contains the following information.

Table 19-4: Sales Analysis Report Field Descriptions

Column	Description
Store Name	Name of store selected in the Business Snapshot window. If you are set up with multiple stores, All Stores indicates that the report contains data for all stores.
Sales Entered	Reporting period selected in the Business Snapshot window. The Sales Analysis report shows sales for this period.
Order Entry/Manual	Count and total value for sales for the reporting period that were entered or attached in Order Entry.
POS	Count and total value for sales for the reporting period that were entered or attached in Point of Sale.
Total	Total of count and total value for sales for the reporting period that were entered or attached in Order Entry and Point of Sale.
Average	Average value of the total for the type of order, payment method, or hourly sale.
Order Summary	Count and value for sales for the reporting period for Order Entry, Point of Sale, and Total sales summarized by the type of order. NOTE: Wire order sales include all fees and taxes.
Sales Pay Method	Count and value for sales for the reporting period for Order Entry, Point of Sale, and Total sales summarized by payment method.
Sales By Hour	Count and value for sales for the reporting period for Order Entry, Point of Sale, and Total sales summarized by the hour during which the sale took place.

Delivery Analysis

Click the **Delivery** tab to display the **Delivery Analysis** report. The status of the sales scheduled for delivery is controlled by using the Designer or Delivery tools.

Figure 19-9: Business Snapshot – Delivery Analysis Report

Delivery Status	Order Entry/Manual		POS		Count	Total		Average
	Count	Total	Count	Total		Total		
DELIVERY ANALYSIS All Stores SALES SCHEDULED FOR DELIVERY 08/01/2005 - 08/02/2005								
Karen's Flower Shop								
NOT DESIGNED	13	\$1,094.93	39	\$3,732.31	52	\$4,827.24	\$92.83	
DESIGNED	1	\$60.75	0	\$0.00	1	\$60.75	\$60.75	
ON THE TRUCK	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00	
DELIVERED	16	\$1,747.16	1	\$1,434.08	17	\$3,181.24	\$187.13	
STORE TOTAL	30	\$2,902.84	40	\$5,166.39	70	\$8,069.23	\$115.27	

The Delivery Analysis report contains the following information

Table 19-5: Delivery Analysis Report Field Descriptions

Column	Description
Store Name	Name of store selected in the Business Snapshot window. If you are set up with multiple stores, All Stores indicates that the report contains data for all stores.
Sales Scheduled for Delivery	Reporting period selected in the Business Snapshot window. The Delivery Analysis report shows deliveries scheduled for this period.
Order Entry/Manual	Count and total value for deliveries for the reporting period that were entered or attached in Order Entry.
POS	Count and total value for deliveries for the reporting period that were entered or attached in Point of Sale.
Total	Total of count and total value for deliveries for the reporting period that were entered or attached in Order Entry and Point of Sale.
Average	Average value of the total deliveries for the delivery status.
Not Designed	Number and value of orders entered in Order Entry and POS that have not been designed, marked as on a truck, or marked as delivered.
Designed	Number and value of orders entered in Order Entry and POS that have been designed, but not marked as on a truck or delivered.
On the Truck	Number and value of orders entered in Order Entry and POS that have been designed and are marked as on a truck, but which have not been marked as delivered.
Delivered	Number and value of orders entered in Order Entry and POS that have been marked as delivered.

Product Analysis

Click the **Products** tab to display the **Product Analysis** report.

Figure 19-10: Business Snapshot – Product Analysis Report

PRODUCT ANALYSIS							
All Stores							
PRODUCTS SCHEDULED FOR DELIVERY 08/01/2005 - 08/02/2005							
	LOCAL & DELIVERIES		OUTGOING		Total		Average
	Count	Total	Count	Total	Count	Total	
Product Category Sales							
Karen's Flower Shop							
Perishables	57	\$3,145.00	0	\$0.00	57	\$3,145.00	\$55.18
Container	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
Plush	9	\$90.00	0	\$0.00	9	\$90.00	\$10.00
Cards	19	\$66.50	0	\$0.00	19	\$66.50	\$3.50
Other	52	\$2,872.69	6	\$186.95	58	\$3,059.64	\$52.75
Silk	3	\$128.00	0	\$0.00	3	\$128.00	\$42.67
Wedding	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
Balloons	30	\$82.50	0	\$0.00	30	\$82.50	\$2.75
Candy	16	\$210.00	0	\$0.00	16	\$210.00	\$13.13
Gourmet	8	\$604.00	0	\$0.00	8	\$604.00	\$75.50
Fruit Baskets	5	\$265.00	0	\$0.00	5	\$265.00	\$53.00
STORE TOTAL	199	\$7,463.69	6	\$186.95	205	\$7,650.64	\$37.32
Product Sales							
Karen's Flower Shop							
Blooming Plants	8	\$415.00	0	\$0.00	8	\$415.00	\$51.88
Bouquet	3	\$220.00	0	\$0.00	3	\$220.00	\$73.33
Candy	8	\$90.00	0	\$0.00	8	\$90.00	\$11.25
Dozen Roses	5	\$375.00	0	\$0.00	5	\$375.00	\$75.00
Dried Silks	1	\$23.00	0	\$0.00	1	\$23.00	\$23.00
Fresh Arrangement	41	\$2,135.00	0	\$0.00	41	\$2,135.00	\$52.07
Fresh Fruit Basket	5	\$265.00	0	\$0.00	5	\$265.00	\$53.00
FTD Belgian Chocolate Gift	8	\$120.00	0	\$0.00	8	\$120.00	\$15.00
FTD Big Hug Bouquet	2	\$80.00	0	\$0.00	2	\$80.00	\$40.00
FTD Friends n Such Bouquet	1	\$50.00	0	\$0.00	1	\$50.00	\$50.00
FTD Sweet Dreams Boy Bouquet	3	\$150.00	0	\$0.00	3	\$150.00	\$50.00
FTD Sweet Dreams Girl Bouquet	1	\$50.00	0	\$0.00	1	\$50.00	\$50.00
FTD Sweet Surprise Bouquet	3	\$150.00	0	\$0.00	3	\$150.00	\$50.00
FTD Thanks A Bunch Bouquet	4	\$150.00	0	\$0.00	4	\$150.00	\$37.50

The Product Analysis report contains the following information

Table 19-6: Product Analysis Report Field Descriptions

Column	Description
Store Name	Name of store selected in the Business Snapshot window. If you are set up with multiple stores, All Stores indicates that the report contains data for all stores.
Products Scheduled for Delivery	Reporting period selected in the Business Snapshot window. The Product Analysis report shows products scheduled for delivery for this period.
Local & Deliveries	Count and total value for the reporting period of products scheduled for local sales and deliveries. The products for these scheduled deliveries will come out of the store's inventory.
Outgoing	Count and total value of products for the reporting period scheduled for outgoing deliveries. These scheduled deliveries do not affect the store's inventory.
Total	Count and total value of products for the reporting period scheduled for both local sales and deliveries and outgoing deliveries.
Average	Average value of the product category or code for the reporting period for both local sales and deliveries and outgoing deliveries.
Product Category Sales	Summarizes the count and value for products scheduled for Local/Delivery and Outgoing delivery by the product sales categories you assigned to products in Product Maintenance.
Product Sales	Shows the count and value for products scheduled for Local/Delivery and Outgoing delivery by the product code.

Wire Analysis

Click the **Wire** tab to display the **Wire Analysis** report.

Figure 19-11: Business Snapshot – Wire Analysis Report

WIRE ANALYSIS MARGIE'S FLOWERS SALES ENTERED 02/18/2008 - 02/18/2008							
Orders By Wire Service	Order Entry/Manual		POS		Total		Average
	Count	Total	Count	Total	Count	Total	
INCOMING							
FTD	7	\$421.96	0	\$0.00	7	\$421.96	\$60.28
TEL	1	\$49.99	0	\$0.00	1	\$49.99	\$49.99
Other	2	\$84.00	1	\$43.00	3	\$127.00	\$42.33
STORE TOTAL	10	\$555.95	1	\$43.00	11	\$598.95	\$54.45
OUTGOING							
FTD	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
TEL	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
Other	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00
STORE TOTAL	0	\$0.00	0	\$0.00	0	\$0.00	\$0.00

The Wire Analysis report contains the following information.

Table 19-7: Wire Analysis Report Field Descriptions

Column	Description
Store Name	Name of store selected in the Business Snapshot window. If you are set up with multiple stores, All Stores indicates that the report contains data for all stores.
Sales Entered	Reporting period selected in the Business Snapshot window. The Wire Analysis report shows incoming and outgoing wire sales for this period.
Order Entry/Manual	Count and total value for incoming and outgoing wire sales for the reporting period that were attached in Order Entry. Values include product and delivery charges, but no fees or service charges.
POS	Count and total value for incoming and outgoing wire sales for the reporting period that were attached in Point of Sale. Values include product and delivery charges, but no fees or service charges.
Total	Total of count and total value for incoming and outgoing wire sales for the reporting period that were attached in Order Entry and Point of Sale. Values include product and delivery charges, but no fees or service charges.
Average	Average value of the total for incoming and outgoing wire sales.
Incoming	Shows the count and value for incoming wire sales for the reporting period that were attached in Order Entry, Point of Sale, and total by wire services.
Outgoing	Shows the count and value for outgoing wire sales for the reporting period that were attached in Order Entry, Point of Sale, and total by the wire services.

Generating the Business Snapshot Report

TASK To generate the Business Snapshot report:

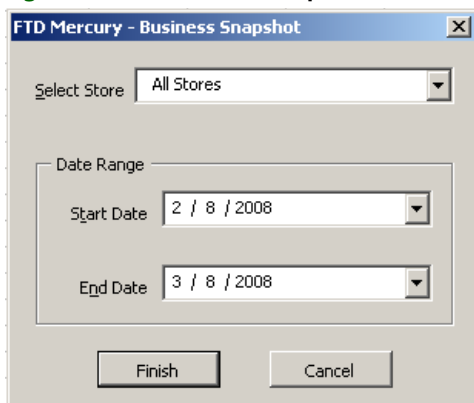
- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Business Snapshot Report** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.

- 5 Select a store, a date range of sale data to include, and then click **Finish**. The report takes a few seconds to populate with data.

Business Snapshot Window

The **Business Snapshot** window allows you to configure settings for the Business Snapshot report. When you are finished configuring settings, click **Finish** to generate the report and open it in Microsoft Excel.

Figure 19-12: Business Snapshot Window



The Business Snapshot window contains the following settings.

Table 19-8: Business Snapshot Window Settings

Setting	Description
Select Store	Select the store for which you are generating the Business Snapshot. If you are set up with multiple stores, you can also select All Stores to generate a combined Business Snapshot.
Start Date	The date for the beginning of the period on which you are reporting.
End Date	The date for the end of the period on which you are reporting.

Credit Card Settlement History Report

The **Credit Card Settlement History** report lists your credit card settlements for the given date range. The report also prints the settlement number, date, approval or error codes, and dollar amounts.

- » The **Detail Report** lists each settlement, including each credit card authorization in the settlement. Totals are listed for each settlement, and grand totals for each store.
- » The **Summary Report** lists each settlement, totals for each settlement, and grand totals for each store.

Generating the Credit Card Settlement History Report

TASK To generate the Credit Card Settlement History report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Credit Card Settlement History** icon to open the template.

- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 In the **Select Store** field, click the arrow and select the store for which you want to print credit card information.
- 6 In the **Date Range** section, click the down arrows to select the start date and the end date.
- 7 In the **Report Type** section, select if you want to print the **Detail Report** or **Summary Report**.
- 8 Click **Finish**. The report generates and opens in Excel.
- 9 To print your report from Excel, on the **File** menu, click **Print**.
- 10 If you want to save the report from Excel, on the **File** menu, click **Save**.

Figure 19-13: Credit Card Settlement History Report - Detail

<p style="text-align: center;">Credit Card Settlement History Leslie's Flowers and Gifts Detail 03/19/2002 - 03/20/2002</p>						
Settlement ID	Date Type	Approval	Settlement Error Number	Approval	Date	Amount
Leslie's Flowers and Gifts						
2	03/19/02 08:50:17	078094647				
	Visa		XXXXXXXXXXXX7890	AP000068	03/19/02 09:44:35	12.56
	Visa		XXXXXXXXXXXX9902	AP000057	03/19/02 10:21:57	59.72
	Master Card		XXXXXXXXXXXX1209	AP000051	03/19/02 10:55:12	90.99
	Visa		XXXXXXXXXXXX8522	AP000069	03/19/02 12:01:08	10.94
	Master Card		XXXXXXXXXXXX5411	AP000059	03/19/02 12:23:02	75.95
	Master Card		XXXXXXXXXXXX8705	AP000061	03/19/02 12:55:17	86.52
Totals						336.68
1	03/20/02 08:42:11	044154859				
	Visa		XXXXXXXXXXXX5903	AP000017	03/19/02 09:52:25	79.04
	Visa		XXXXXXXXXXXX2902	AP000028	03/19/02 09:00:11	90.45
	Visa		XXXXXXXXXXXX6830	AP000041	03/20/02 10:47:32	32.50
	Master Card		XXXXXXXXXXXX5782	AP000047	03/20/02 10:59:40	67.98
	Visa		XXXXXXXXXXXX9527	AP000042	03/20/02 12:16:78	50.31
	Master Card		XXXXXXXXXXXX9058	AP000049	03/20/02 11:09:65	114.52
	Master Card		XXXXXXXXXXXX2946	AP000050	03/20/02 11:31:35	89.98
	Master Card		XXXXXXXXXXXX9286	AP000043	03/20/02 16:19:04	159.09
	Visa		XXXXXXXXXXXX1139	AP000044	03/20/02 16:01:12	72.71
	Visa		XXXXXXXXXXXX2851	AP000039	03/20/02 08:44:59	94.62
	Visa		XXXXXXXXXXXX9982	AP000046	03/20/02 09:14:29	58.92
	Master Card		XXXXXXXXXXXX3826	AP000038	03/20/02 12:44:41	38.59
Totals						948.70
Store Total						
Master Card						8 734.56
Visa						10 561.77
Total						18 1,296.33

Figure 19-14: Credit Card Settlement History Report - Summary

Credit Card Settlement History				
Leslie's Flowers and Gifts				
Summary				
03/19/2002 - 03/20/2002				
Settlement ID	Date	Approval	Settlement Error	Amount
Leslie's Flowers and Gifts				
2	03/19/02 08:50:17	078094647		336.68
1	03/20/02	044154859		948.70
Totals				1,296.33
			Store Total	Count Amount
			Master Card	8 734.56
			Visa	10 561.77
			Total	18 1,296.33

Credit Card Settlement History Window

The Credit Card Settlement History window allows you to configure settings for the Credit Card Settlement History report.

Figure 19-15: Credit Card Settlement History Window

The Credit Card Settlement History window contains the following settings.

Table 19-9: Credit Card Settlement History Window Settings

Setting	Description
Select Store	Select the store for which you want to generate the report. If you have multiple stores, you can select All Stores to generate a report that includes data from all of your stores.
Date Range	Select the start and end dates for the report.

Table 19-9: Credit Card Settlement History Window Settings (cont.)

Setting	Description
Report Type	Select whether you want to generate a summary or detail report.

Customer Account Payment Report

The **Customer Account Payment** report lists all payments made on house accounts within the given date range. The report is listed by customer ID. Grand totals by payment method are also listed at the bottom of the report.

- » The **Detail Report** lists each customer that made a payment within the specified date range, as well as each individual payment, the payment method, the payment date, and the payment amount. A total is also listed for each customer.
- » The **Summary Report** lists each customer that made a payment within the specified date range, and the total amount that the customer has paid.

Generating the Customer Account Payment Report

TASK To generate the **Customer Account Payment** report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Customer Account Payments Report** icon to open the template.
- 4 If a window opens asking if you wish to enable macros, click **Enable Macros**.
- 5 In the **Select Store** field, click the arrow and select the store's data that you want to use for the report.
- 6 In the **Report Type** section, select if you want to print the **Detail Report** or **Summary Report**.
- 7 In the **Sort Option** section, select if you want to sort the report by **Payment Type** or **Date**.
- 8 In the **Date Range** section, select a start and end date for the data that you want to include in the report. These dates are the dates that the payment was entered into the system.
- 9 Click **Finish**. The report generates and opens in Excel.
- 10 To print your report from Excel, on the **File** menu, click **Print**.
- 11 If you want to save the report from Excel, on the **File** menu, click **Save**.

Figure 19-16: Customer Account Payments Report - Detail

<p align="center">Customer Account Payments Leslie's Flowers and Gifts Detail - Sort by Date 02/01/2002 - 04/01/2002</p>				
Cust No.	Customer Name Sale ID	Payment Type	Date	Amount
<u>Leslie's Flowers and Gifts</u>				
BronaAb	Abbey Bronan 0006746	Check	02/10/2002	25.10
Total				25.10
DeWitAm	Amie Dewitte 0006812	Check	02/12/2002	50.00
	0007891	Check	03/07/2002	62.49
Total				112.49
IngleFr	Fred Ingles 0006765	Cash	02/10/2002	30.00
	0007723	Check	03/02/2002	55.10
	0007902	Check	04/01/2002	45.10
Total				130.00
MonroJa	James Monroe 0007881	Check	03/06/2002	82.43
Total				82.43
RodriCa	Candy Rodriguez 0006689	Check	02/04/2002	40.00
	0007814	Cash	03/04/2002	40.00
	0007931	Cash	04/01/2002	60.00
Total				140.00
Store Total				489.92
		Store Total	Count	Amount
		Cash	3	130.00
		<u>Check</u>	<u>7</u>	<u>359.92</u>
		Total	10	489.92

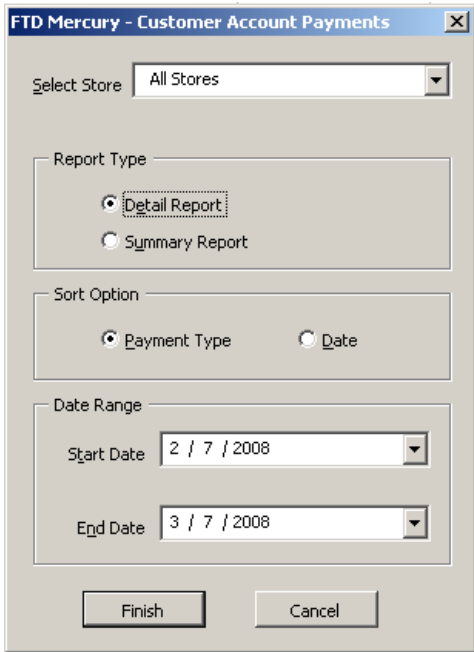
Figure 19-17: Customer Account Payments Report - Summary

Customer Account Payments		
Leslie's Flowers and Gifts		
Summary		
04/08/2002 - 04/08/2002		
Cust No.	Customer Name	Amount
<u>Leslie's Flowers and Gifts</u>		
BronaAb	Abbey Bronan	100.00
BrownJi	Jim Brown	25.10
DeWitAm	Amie Dewitte	51.86
FranLi	Lisa Francis	50.00
IngleFr	Fred Ingles	100.00
JohnsPa	Paula Johnson	75.10
MonroJa	James Monroe	50.00
ParloJo	John Parlow	43.28
RodriCa	Candy Rodriguez	25.10
VitneCa	Carrie Vitner	55.90
Store Total		576.14
	Store Total	Count
	Cash	3
	Check	Z
	Total	10
		Amount
		250.00
		<u>326.14</u>
		576.14

Customer Account Payments Window

The **Customer Account Payments** window allows you to configure settings for the Customer Account Payment report. When you have finished configuring settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-18: Customer Account Payments Window



The Customer Account Payments window contains the following settings.

Table 19-10: Customer Account Payments Window Settings

Setting	Description
Select Store	Select the store for which you want to generate the report. If you have multiple stores, you can select All Stores to generate a report that includes data from all of your stores.
Report Type	Select whether you want to generate a summary or detail report.
Sort Option	For detailed reports, select whether you want the report sorted by date or payment type.
Date Range	Select the start and end dates for the report.

Customer Master List

The Customer Master List provides you with a list of all your customers, as well as their current balance information, and house account information such as their credit limit and discount amount. This report may take several minutes to print, depending on the size of your customer database.

Figure 19-19: Customer Master List

Customer Master Karen's Flower Shop Sort by Customer Name Selected Cash, Credit, Check, Debit, House, Gift Certificate						
Account Number Name Address City, State Zipcode	Phone Number Active Status Direct Marketing Marketing Category	Finance Charge Discount Credit Limit Marketing Type	Ave. Order Last Sale	Current 30 Days Past 60 Days Past 90 Days Past Over 90 Days	Balance	
SMITHJA Jamie Smith 9501 Iroquois St WARRENVILLE IL 60533	630-555-8826 Active Yes Account Type Mailing List	12.00% 10.00% 500.00 Personal No	23.72 6/10/01	0.00 0.00 0.00 0.00	0.00	0.00
CATINMI Michelle Catine 3102 Woodcreek Drive DOWNS GROVE IL 60515	630-555-9017 Active Yes Account Type Mailing List	12.00% 0.00% 500.00 Personal No	40.70 5/11/02	0.00 0.00 0.00 0.00	0.00	0.00
SMITHBE Beth Smith 4098 Arbor Lane WARRENVILLE IL 60533	630-555-9999 Active Yes Account Type Mailing List	12.00% 0.00% 500.00 Personal Yes	39.72 6/8/01	0.00 0.00 0.00 0.00	0.00	0.00
BOSCOSU Sue Bosco 4052 Maple Avenue LISLE IL 60532	630-555-1091 Active Yes Account Type Mailing List	12.00% 0.00% 1,000.00 Personal Yes	21.96 4/17/02	520.29 0.00 0.00 0.00	520.29	520.29
RIZZIBO Bob Rizzio 1239 Maple Avenue LISLE IL 60532	630-555-7618 Active Yes Account Type Mailing List	12.00% 10.00% 1,000.00 Personal No	47.81 5/9/02	685.80 0.00 0.00 0.00	685.80	685.80

Generating the Customer Master List

TASK To generate the Customer Master List:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Customer Master** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 If you receive the message "This application is about to initialize ActiveX controls..." click **OK**.
- 6 In the **Store of Origin** field, click the arrow and select the store's data that you want to use for the report.
- 7 In the **Please select payment type** section, click in the check boxes so check marks appear for any combination of payment types you wish to include in this report.
- 8 If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See [Marketing Screen](#) on page 24–21 for information on setting up these categories.)

To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.

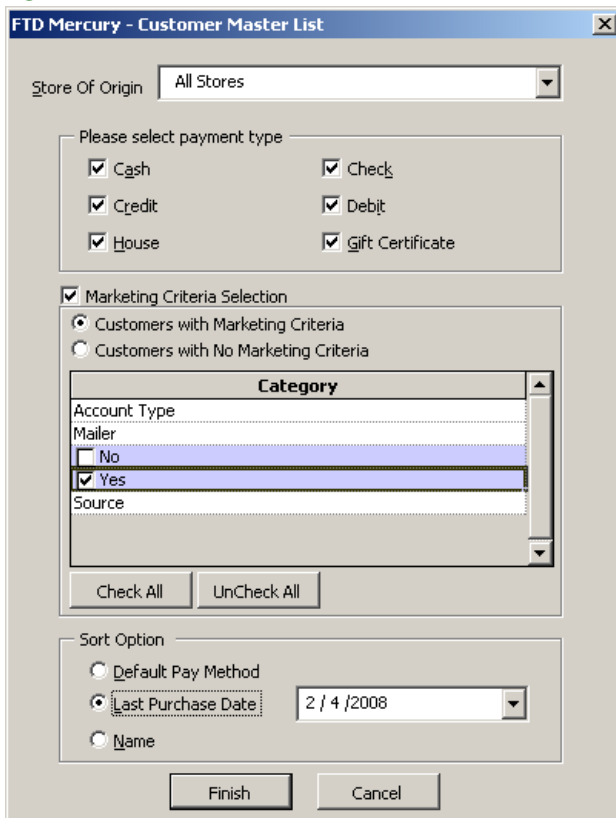
To print only customers with **no marketing information specified** in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.

- 9 In the **Sort Option** section, choose whether you wish to list customers according to **Default Pay Method**, **Last Purchase Date**, or **Name**. If you select to sort by last purchase date, specify the last purchase date by clicking the down arrow in the date field and selecting the date from the calendar.
- 10 Click **Finish**. The report generates and opens in Excel.
- 11 To print your report from Excel, on the **File** menu, click **Print**.
- 12 If you want to save the report from Excel, on the **File** menu, click **Save**.

Customer Master List Window

The **Customer Master List** window enables you to configure settings for the Customer Master List report. When you have finished configuring the settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-20: Customer Master List Window



The Customer Master List window contains the following settings.

Table 19-11: Customer Master List Window Settings

Setting	Description
Store of Origin	From this list, select the store with which the customer is associated. If you have multiple stores, you can select All Stores.
Payment Types	Select the payment type(s) you want to include in the report. You can select Cash, Check, Credit, Debit, House, or Gift Certificate.
Marketing Criteria Selection	If you select this option, you can filter the report so it includes customers with specific marketing criteria or no marketing criteria. If you select Customers with Marketing Criteria, you can select the marketing categories to include.
Sort Option	You can select to sort the report by the Default Pay Method, the Last Purchase Date (requires you specify the date), or by Name.

Employee Analysis Report

The Employee Analysis report allows you to print productivity reports for your clerk, designer, and driver employee types. These reports allow you to see how each of your employees have performed for a given date range. For example, you can generate reports that print which products your employees have sold, designed, or delivered including average dollar amounts, discounts given, number of items, etc.

Following are examples of some variations of the report:

The **Clerk – Summary** report lists products sold by product category and includes the quantities and dollar amounts:

Figure 19-21: Employee Analysis – Clerk Summary

Employee Analysis						
Clerk - Inventory						
Summary - Sale Date						
All Stores						
07/29/2005 - 07/29/2005						
Employee	Product Code	Items	Product Amount	Discounts	Total Amount	Average Amount
Administrator						
	Balloons	6	2.00	0.00	12.00	2.00
	Candy	8	25.00	0.00	115.00	14.38
	Cards	4	3.50	0.00	14.00	3.50
	Fee	3	106.08	0.00	113.08	37.69
	Fruit Baskets	3	50.00	0.00	150.00	50.00
	Gourmet	1	75.00	0.00	75.00	75.00
	Other	3	115.00	0.00	180.00	60.00
	Perishables	14	228.00	0.00	755.00	53.93
	Plush	2	10.00	0.00	20.00	10.00
Employee Total		44	614.58	0.00	1,434.08	32.59
Jennifer						
	Cards	2	3.50	0.00	7.00	3.50
	Fee	2	21.64	0.00	21.64	10.82
	Gourmet	1	75.00	0.00	75.00	75.00

The **Clerk – Detail** report lists the individual products sold, which are totaled for each product category:

Figure 19-22: Employee Analysis – Clerk Detail

Employee Analysis

Clerk - Inventory

Detail - Sale Date

All Stores

08/02/2005 - 08/02/2005

Employee	Product Code	Items	Product Amount	Discounts	Total Amount	Average Amount
Jennifer						
Fee						
RELAY	IL Sales Tax	1	7.50	0.00	7.50	7.50
Employee Category Total		1	7.5	0	7.5	7.5
Other						
V2	The FTD Sweethearts Bouquet	1	34.99	0.00	34.99	34.99
Employee Category Total		1	34.99	0	34.99	34.99
Perishables						
ARR	Fresh Arrangement	3	50.00	0.00	150.00	50.00
BPL	Blooming Plants	1	50.00	0.00	50.00	50.00
Employee Category Total		4	100	0	200	50
Plush						
TB	Teddy Bear	1	10.00	0.00	10.00	10.00
Employee Category Total		1	10	0	10	10
Employee Total		7	152.49	0.00	252.49	36.07
Lisa						
Candy						
CFC	Candy	1	10.00	0.00	10.00	10.00

The **Designer – Summary** report lists products designed by product category and includes the quantities and dollar amounts:

Figure 19-23: Employee Analysis – Designer Summary

Employee Analysis

Designer - Inventory
 Summary - Delivery Date
All Stores
 07/28/2005 - 08/02/2005

Employee Product Code	Items	Product Amount	Discounts	Total Amount	Average Amount
Karen					
	Fruit Baskets	1	50.00	0.00	50.00 50.00
	Gourmet	1	75.00	0.00	75.00 75.00
	Other	1	40.00	0.00	40.00 40.00
	Perishables	5	295.00	0.00	345.00 69.00
Employee Total		8	460.00	0.00	510.00 63.75
Leslie					
	Other	2	100.00	0.00	100.00 50.00
	Perishables	17	228.00	0.00	930.00 54.71
Employee Total		19	328.00	0.00	1,030.00 54.21
Grand Total		27	788.00	0.00	1,540.00 57.04

The **Designer – Detail** report lists the individual products designed, which are totaled for each product category:

Figure 19-24: Employee Analysis – Designer Detail

Employee Analysis

Designer - Inventory
 Detail - Delivery Date
All Stores
 07/29/2005 - 07/29/2005

Employee Product Code	Items	Product Amount	Discounts	Total Amount	Average Amount
Karen					
Fruit Baskets					
FRT	Fresh Fruit Basket	1	50.00	0.00	50.00 50.00
Employee Category Total		1	50	0	50 50
Gourmet					
GMT	Gourmet Basket	1	75.00	0.00	75.00 75.00
Employee Category Total		1	75	0	75 75
Other					
BH	FTD Big Hug Bouquet	1	40.00	0.00	40.00 40.00
Employee Category Total		1	40	0	40 40
Perishables					
ARR	Fresh Arrangement	1	75.00	0.00	75.00 75.00
BOU	Bouquet	1	120.00	0.00	120.00 120.00
Employee Category Total		2	195	0	195 97.5

The **Driver – Summary** report lists products delivered by product category and includes the quantities and dollar amounts:

Figure 19-25: Employee Analysis – Driver Summary

Employee Analysis
Driver - Inventory
Summary - Delivery Date
All Stores
08/02/2005 - 08/02/2005

Employee	Product Code	Items	Product Amount	Discounts	Total Amount	Average Amount
Cathy						
	Fee	1	6.22	0.00	6.22	6.22
	Fee	1	6.22	0.00	6.22	6.22
	Other	1	32.99	0.00	32.99	32.99
	Perishables	2	50.00	0.00	100.00	50.00
	Perishables	2	50.00	0.00	100.00	50.00
	Plush	1	10.00	0.00	10.00	10.00
Employee Total		8	155.43	0.00	255.43	31.93
Dan						
	Candy	1	10.00	0.00	10.00	10.00
	Fee	1	6.37	0.00	6.37	6.37
	Fee	1	6.37	0.00	6.37	6.37
	Fee	1	6.37	0.00	6.37	6.37
	Other	1	49.99	0.00	49.99	49.99
	Other	1	49.99	0.00	49.99	49.99
	Other	1	49.99	0.00	49.99	49.99
	Perishables	1	50.00	0.00	50.00	50.00
Employee Total		8	229.08	0.00	229.08	28.64

The **Driver – Detail** report lists the individual products delivered, which are totaled for each product category:

Figure 19-26: Employee Analysis – Driver Detail

Employee Analysis
Driver - Inventory
Detail - Delivery Date
All Stores
08/02/2005 - 08/02/2005

Employee	Product Code	Items	Product Amount	Discounts	Total Amount	Average Amount
Cathy						
	Other					
	B1-3710	The FTD Tigress Bouquet - Novemb	1	32.99	0.00	32.99
Employee Category Total			1	32.99	0.00	32.99
Perishables						
	ARR	Fresh Arrangement	2	50.00	0.00	100.00
Employee Category Total			2	50.00	0.00	50.00

Generating the Employee Analysis Report

TASK To generate the Employee Analysis Report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Employee Analysis** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.

- 5 In the Employee Type section, select if you would like to print the Clerk, Designer, or Driver analysis report.
- 6 In the Report Type section, select if you would like to print the Detail Report or Summary Report.
- 7 In the Sale Type section, select if you would like to print Inventory sales (sales where the product from your inventory was used), Wire Out sales or Both.
- 8 In the Date Range section, select a **Start Date** and **End Date** for the data that you would like to include in the report. Select whether you want the report generated by **Delivery Date** or **Sale Date**.
- 9 Click **Finish**. The report generates and opens in Excel.
- 10 To print your report from Excel, on the **File** menu, click **Print**.
- 11 If you want to save the report from Excel, on the **File** menu, click **Save**.

Employee Production Report Window

The Employee Production Report windows allows you to configure settings for the Employee Analysis report. When you have finished configuring settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-27: Employee Production Report Window

The Employee Production Report window contains the following settings.

Table 19-12: Employee Production Report Window Settings

Setting	Description
Select Store	Select the store for which you want to generate the report. If you have multiple stores, you can select All Stores to generate a report that includes data from all of your stores.

Table 19-12: Employee Production Report Window Settings (cont.)

Setting	Description
Employee Type	Select the type of employee for which you are generating the report. You can select Clerk, Designer or Driver.
Report Type	Select whether you want to generate a summary or detail report.
Sale Type	Select whether you want the report to include sales from your inventory, wire out sales, or both.
Date Range	Select the start and end dates for the report.
Delivery or Sale Date	Select whether the report will be based on delivery or sale dates.

Employee Sales Report


You may monitor your employees' sales activity by printing an Employee Sales report. This report displays an order count and total dollar amount of orders for each employee for a given sales date range. The following steps teach you how to print an Employee Sales Report.

Generating the Employee Sales Report

TASK To generate an Employee Sales report:

- 1 In FTD Mercury, from the **Management** menu, click **Employee Sales Summary**. The **Employee Sales Report** window opens.
- 2 At the top of the window, click whether you want to display **Daily Sales Data**, **Weekly Sales Data**, or **Monthly Sales Data**. For example, if you print Weekly Sales Data for the month of April, FTD Mercury displays the total order count and dollar amount for each week in April (see example below).
- 3 In the **Employee Name** field, click the arrow and select the employee for whom you want to display sales information.
- 4 In the **Select Date Range** section, use the down arrows to select a to and from date for the sales for which you want to display statistics.
- 5 Click **Search**.
- 6 To print your report, click **Print**. The report will print to the printer selected for General Printing in Tools > Printer Form Settings.

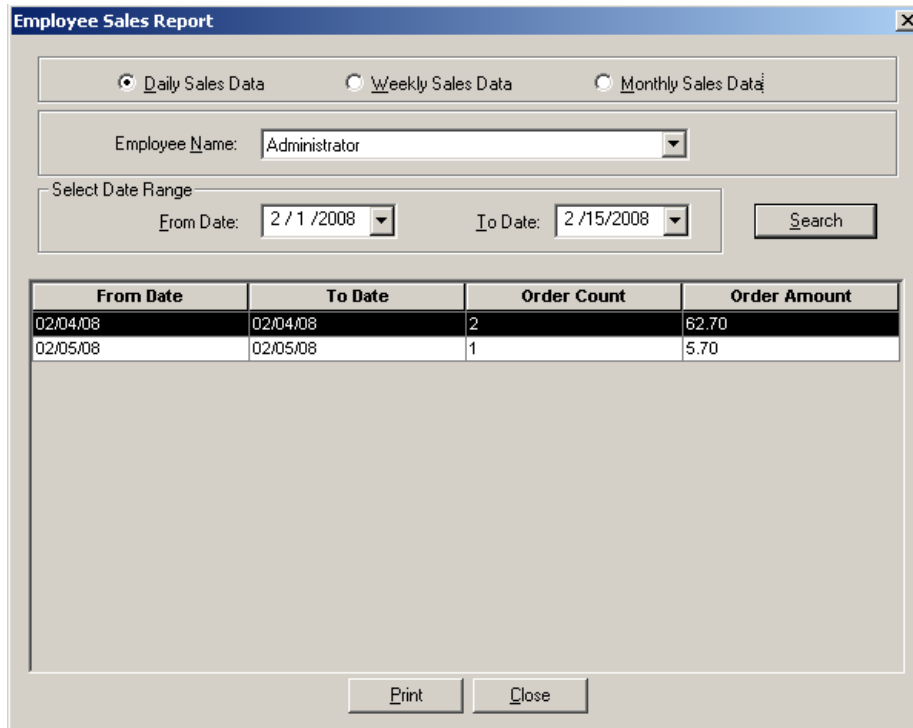
Figure 19-28: Employee Sales Report (Weekly Sales Data)

		Leslie's Flowers and Gifts 1220 Main Street DOWNERS GROVE, IL 60515	
Employee Name: Kerry Smith		Employee Sales Report	
		Page 1 of 1	
From Date	To Date	Order Count	Order Amount
Apr 08, 02	Apr 14, 02	49	1,649.36
Apr 15, 02	Apr 21, 02	37	1,002.59
Apr 22, 02	Apr 28, 02	52	1,751.11

Employee Sales Report Window

The Employee Sales Report window allows you to configure settings for the Employee Sales Report.

Figure 19-29: Employee Sales Report Window



The Employee Sales Report window contains the following settings.

Table 19-13: Employee Sales Report Window Settings

Setting	Description
Daily, Weekly, Monthly Sales Data	Select the period for which you want to see the employee's sales data.
Employee Name	Select the employee whose data you are reporting.
Date Range	Use the drop-down calendars to select the start and end dates for sales to be included in the report.

Message Report

The **Message Report** lists all orders and messages that you have sent or received during the time period you specify.

Figure 19-30: Message Report

Message Report									
05/30/2000-05/30/2000									
Message Type	Status	Wire Abbr	Message Date	Sending Florist	Filling Florist	Network ID	Order Amount	Delivery Date	
ORD IN	RECEIVED	FTD	5/30/02	90-0888AF	90-0001AA	B4858C-0047	45.10	5/22/00	
ORD IN	RECEIVED	FTD	5/30/02	90-1309AF	90-0001AA	B4858F-0048	25.10	5/27/00	
ORD IN	RECEIVED	FTD	5/30/02	90-0888AF	90-0001AA	B4858G-0049	50.00	5/30/00	
ORD IN	RECEIVED	FTD	5/30/02	90-5671AA	90-0001AA	B4853Y-0304	45.10	5/30/00	
GEN OUT	SENT		5/30/02	90-0001AA	90-9067AA	B3704D-1302			
GEN IN	RECEIVED		5/30/02	90-8906AF	90-0001AA	B4607H-1303			
ORD IN	RECEIVED	FTD	5/30/02	90-0888AF	90-0001AA	B4701N-1304	75.10	5/30/00	
									Count: 7

Generating the Message Report

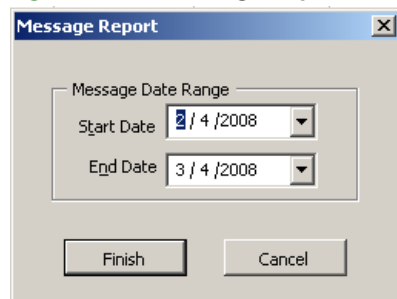
TASK To generate the Message report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Message Report** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 When the **Message Report** window opens:
 - a. Click the arrow in the **Start Date** field to display a calendar. Use your mouse to click on the date from which your system will begin to list messages.
 - b. Click the arrow in the **End Date** field to display a calendar. Use your mouse to click on the date that your system will end listing messages.
 - c. Click **Finish**. The report generates and opens in Excel.
- 6 To print your report from Excel, on the **File** menu, click **Print**.
- 7 If you want to save the report from Excel, on the **File** menu, click **Save**.

Message Report Window

The **Message Report** window allows you to configure the message date range for the Message Report. Click **Finish** to generate the report and open it in Microsoft Excel.

Figure 19-31: Message Report Window



The Message Report window contains the following settings.

Table 19-14: Message Report Window Settings

Setting	Description
Start Date	Enter the starting date for the report.
End Date	Enter the ending date for the report

Payment Type Totals Report

The **Payment Type Totals** report lists all payments made by your customers, within a specified date range. Data is sorted by payment type (cash, credit card, house, check, debit card, gift card, and gift certificate).

Figure 19-32: Payment Type Totals Report

Date	Cash		Credit Card		House		Check		Debit Card		Gift Card		Gift Certificate		Write-Off	
	Amount	Count	Amount	Count	Amount	Count	Amount	Count	Amount	Count	Amount	Count	Amount	Count	Amount	Count
02/06/2008	93.95	3	877.14	13	1,781.65	32	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0
02/07/2008	130.85	3	497.00	11	5,399.20	87	193.00	3	0.00	0	0.00	0	0.00	0	0.00	0
02/08/2008	181.24	6	409.40	9	2,614.55	44	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0
02/09/2008	0.00	0	326.63	6	806.84	15	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0
02/10/2008	25.00	1	111.89	3	1,179.79	20	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0
02/11/2008	0.00	0	1,703.22	24	6,072.25	89	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0
02/12/2008	219.95	5	1,558.43	25	6,609.94	100	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0
02/13/2008	258.35	10	2,905.99	52	12,428.67	190	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0
02/14/2008	731.98	38	2,165.44	52	3,409.89	56	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0
02/15/2008	36.80	2	281.35	5	2,273.08	42	0.00	0	0.00	0	0.00	0	0.00	0	0.00	0

Generating the Payment Type Totals Report

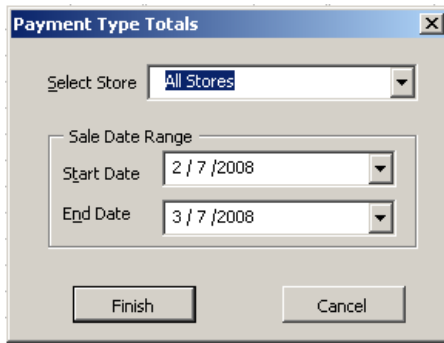
TASK To generate the **Payment Type Totals** report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Payment Type Totals** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 In the **Select Store** field, click the arrow and select the store's data that you want to use for the report.
- 6 In the **Start Date** field of the **Sale Date Range** area, click the arrow to display a calendar. Use your mouse to click on the date from which your system will start listing payment type totals.
- 7 In the **End Date** field, click the arrow to display a calendar. Use your mouse to click on the date that your system will end listing payment type totals.
- 8 Click **Finish**. The report generates and opens in Excel.
- 9 To print your report from Excel, on the **File** menu, click **Print**.
- 10 If you want to save the report from Excel, on the **File** menu, click **Save**.

Payment Type Totals Window

The **Payment Type Totals** window allows you to configure settings for the **Payment Type Totals** report. When you have finished configuring settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-33: Payment Type Totals Window



The Payment Type Totals window contains the following settings.

Table 19-15: Payment Type Totals Window Settings

Setting	Description
Select Store	Select the store for which you want to generate the report. If you have multiple stores, you can select All Stores to generate a report that includes data from all of your stores.
Sale Date Range	Enter the start and end dates for the report.

Product Comparison Report

The **Product Comparison** report allows you to view a comparison of two sales date ranges or the same sales date range for two stores. For example, you may want to compare Valentine's Day sales from last year to this year. Or you may want to compare two stores' performance on a certain day. **Detail** and **Summary** reports can be printed. The **Detail** report compares sales by product code and product category, while the **Summary** report compares sales by product category only.

The **Product Comparison – Date Range Summary Report** compares data by product category:

Figure 19-34: Product Comparison – Date Range Summary Report

PRODUCT COMPARISON REPORT							
Summary by Date Range							
07/28/2005 - 07/28/2005 Compared to 08/02/2005 - 08/02/2005							
Inventory Sales							
Prod Code	Total Items	Karen's Flower Shop		Karen's Flower Shop		VARIANCES	
		07/28/2005 - 07/28/2005		08/02/2005 - 08/02/2005		Sales	
		Sales Amount	Items	Sales Amount	Items	Amount	% - Change
Balloons	18	12.00	6	34.00	12	22.00	64.7%
Candy	14	115.00	8	75.00	6	-40.00	-53.3%
Cards	8	24.50	7	3.50	1	-21.00	-600.0%
Fee	9	28.00	4	35.00	5	7.00	20.0%
Fruit Baskets	6	200.00	4	100.00	2	-100.00	-100.0%
Gourmet	5	225.00	3	150.00	2	-75.00	-50.0%
Other	13	270.00	5	383.96	8	113.96	29.7%
Perishables	36	1,500.00	26	600.00	10	-900.00	-150.0%
Plush	8	30.00	3	50.00	5	20.00	40.0%
Silk	1	0.00	0	120.00	1	120.00	100.0%
Grand Total:	118	2,404.50	66	1,551.46	52	-853.04	-55.0%

The **Product Comparison – Date Range Detail** Report compares data on a product code level. The product codes are also totaled out by product category:

Figure 19-35: Product Comparison – Date Range Detail Report

PRODUCT COMPARISON REPORT									
Detail by Date Range									
07/28/2005 - 07/28/2005 Compared to 08/02/2005 - 08/02/2005									
Inventory Sales									
Prod Code	Name	Total Items	Karen's Flower Shop		Karen's Flower Shop		VARIANCES		
			07/28/2005 - 07/28/2005		08/02/2005 - 08/02/2005				
			Sales Amount	Items	Sales Amount	Items	Sales Amount	% - Change	
Balloons									
LBLN	Latex Balloon	14	12.00	6	16.00	8	4.00	25.0%	
MBLN	Mylar Balloons	4	0.00	0	18.00	4	18.00	100.0%	
Category Total:		18	12.00	6	34.00	12	22.00	64.7%	
Candy									
BC	FTD Belgian Chocolate Gift	10	105.00	7	45.00	3	-60.00	-133.3%	
CFC	Candy	4	10.00	1	30.00	3	20.00	66.7%	
Category Total:		14	115.00	8	75.00	6	-40.00	-53.3%	
Cards									
CAR	Greeting Card	8	24.50	7	3.50	1	-21.00	-600.0%	
Category Total:		8	24.50	7	3.50	1	-21.00	-600.0%	
Fee									
DELIV	Delivery Charge	9	28.00	4	35.00	5	7.00	20.0%	
Category Total:		9	28.00	4	35.00	5	7.00	20.0%	
Fruit Baskets									
FRT	Fresh Fruit Basket	6	200.00	4	100.00	2	-100.00	-100.0%	
Category Total:		6	200.00	4	100.00	2	-100.00	-100.0%	
Gourmet									
GMT	Gourmet Basket	5	225.00	3	150.00	2	-75.00	-50.0%	
Category Total:		5	225.00	3	150.00	2	-75.00	-50.0%	
Other									
B1-3710	The FTD Tigress Bouquet - November	1	0.00	0	32.99	1	32.99	100.0%	
gc	Gift Certificate	3	130.00	2	100.00	1	-30.00	-30.0%	
BH	FTD Big Hug Bouquet	3	40.00	1	80.00	2	40.00	50.0%	
MM	FTD Sweet Surprise Bouquet	2	50.00	1	50.00	1	0.00	100.0%	

Generating a Product Comparison Report

TASK To print the Product Comparison report:

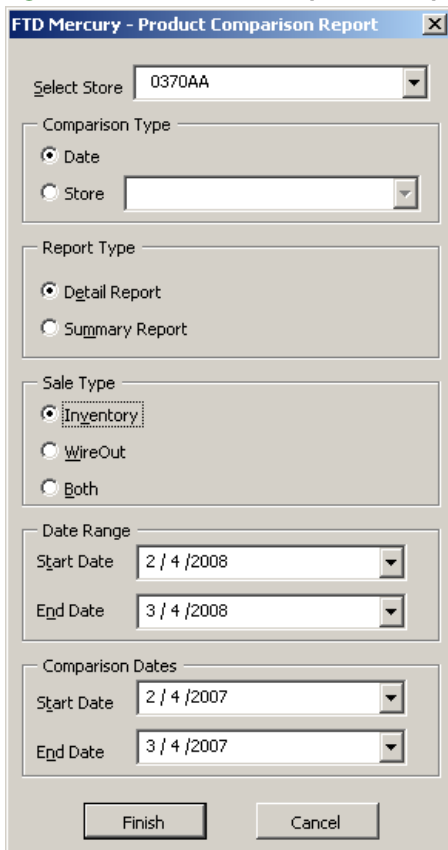
- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Product Comparison Report** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 Specify the information that you want to compare:
 - » **Select Store** – Select a store. If you are comparing data between stores, you will select the second store in the next field.
 - » **Comparison Type** – If you are comparing two dates or date ranges, select **Date**. If you are comparing two store's data for a given date or date range, select **Store** and then select the store in the drop-down list.
 - » **Report Type** – Select if you want to print the **Detail** or **Summary** report. The Detail report lists totals by product category. The Summary report lists totals by product code.

- » **Sale Type** – Select if you want to include **Inventory** sales, **Wire Out** sales, or **Both**.
 - » **Date Range** – Specify the sales date range you want to compare. If you are comparing two stores' data, this is the date range that you are comparing between the two stores.
 - » **Comparison Dates** – This field is active only if you are comparing dates ranges for the same store. Specify the date range that you want to compare to the first date range.
- 6 Click **Finish**. The report generates and opens in Excel.
 - 7 To print your report from Excel, on the **File** menu, click **Print**.
 - 8 If you want to save the report from Excel, on the **File** menu, click **Save**.

Product Comparison Report Window

The **Product Comparison Report** window enables you to configure settings for the Product Comparison report. When you are finished configuring settings, click **Finish** to generate the report and open it in Microsoft Excel.

Figure 19-36: Product Comparison Report Window



The Product Comparison Report window contains the following settings.

Table 19-16: Product Comparison Report Window Settings

Setting	Description
Select Store	Select the store for the report. If you are comparing data between two stores, you select the second store in the Comparison Type area.
Comparison Type	Select whether you want to generate a comparison report by date or by store. If you select Store, choose the store you are comparing the store in the Select Store list against.

Table 19-16: Product Comparison Report Window Settings (cont.)

Setting	Description
Report Type	Select whether you want to generate a Detail Report or a Summary Report.
Sale Type	Select whether you want to include Inventory sales, Wire Out sales, or Both.
Date Range	Specify the sales date range you want to compare. If you are comparing data from two stores, this is the sales date range you are comparing between the two stores.
Comparison Dates	This area is only enabled if you are comparing date ranges from the same store. Specify the date range you want to compare to the values set in the Date Range area.

Product Sales Reports

The Product Sales Reports provide you with an analysis of which products are selling and how many are being sold either in-house, outgoing, or both. There are three different types of sales analysis reports: Product List, Sales by Product Code, and Sales by Date, Occasion, and Product. Each type has a summary report and a detail report.

NOTE

It is possible for the same product to be listed more than once on the Sales by Product Code and Sales by Date, Occasion, and Product reports if that product was sold under different occasion types.

List of Product Codes Summary Report

The **Product List – Summary** report lists the products that you have in your product database.

Figure 19-37: Product Sales Report – Product List – Summary
List of Product Codes Summary
 All Store Locations
 Start to End

Prod Code	Product Name	Description
A1	The FTD Fall Harvest Bouquet	
A2	The FTD Autumn Splendor Bouquet	
AB	FTD Anniversary Bouquet	
ADJUST_WEB	ONLINE ADJUSTMENT	
ARR	Fresh Arrangement	
B1	The FTD Bosses' Day Bouquet	
B1-3700	The FTD Winter Elegance Bouquet - January	
B1-3701	The FTD Pink Lily Bouquet - February	
B1-3702	The FTD Morning Joy Bouquet - March	
B1-3703	The FTD First Blooms Bouquet - April	
B1-3704	The FTD Peak Of Freshness Bouquet - May	
B1-3705	The FTD Happiness Bouquet - June	
B1-3706	The FTD Rose Fest Bouquet - July	
B1-3707	The FTD Burst Of Summer Bouquet - August	
B1-3708	The FTD Garden Gate Bouquet - September	
B1-3709	The FTD Fireburst Bouquet - October	
B1-3710	The FTD Tigress Bouquet - November	
B1-3711	The FTD Winterfresh Bouquet - December	
B10-3446	The FTD Crimsom & Evergreen Wreath	
B10-3720	The FTD Holiday Gold Wreath	
B10-3721	The FTD Beacon Hill Wreath	
B10-3722	The FTD Sleigh Ride Arrangement	
B10-3723	The FTD Glad Tidings Tree	
B10-3724	The FTD Holiday Classics Garland	
B11-2921	The FTD Lights of the Season Centerpiece	
B12-3099	The FTD Festive Season Arrangement	
B12-3254	The FTD Festival of Lights Arrangement	
B12-3734	The FTD Feast of Light Centerpiece	
B13-3501	The FTD Fresh as a Daisy Bouquet	
B13-3510	The FTD Spring Glory Centerpiece	
B13-3736	The FTD Easter Delights Centerpiece	
B13-3737	The FTD Spring Enchantment Bouquet	
B14-3229	The FTD Pink Splendor Bouquet	
B14-3230	The FTD Raspberry Patch Arrangement	
B14-3598	The FTD Smooth Jazz Bouquet	
B15-3735	The FTD Joy of Spring Bouquet	
B16-3227	The FTD Friendly Welcome Arrangement	
B16-3228	The FTD Carnival Bouquet	
B16-3738	The FTD Garden Spring Basket	
B16-3739	The FTD Spirit of Spring Basket	
B16-3740	The FTD Hint of Spring Bouquet	
B16-9143	The FTD Easter Lily Plant	
B17-3487	The FTD Springtime Jubilee Bouquet	
B18-3226	The FTD Basket Of Stars Bouquet	
B18-3741	The FTD Summer Medley Bouquet	
B18-3742	The FTD Fun in the Sun Basket	
B19-3263	The FTD Celebration of Life Bouquet	
B19-3466	The FTD Daylight Bouquet	
B2-2901	The FTD Autumn Beauty Bouquet	

List of Product Codes Detail Report

The **List of Product Codes Detail** report contains detail product information, such as quantities on hand, prices, and tax codes.

Figure 19-38: Product Sales Report – Product List – Detail
List of Product Codes Detail
MARGIE'S FLOWERS
 Start to End
 All Categories

Prod Code	Product Category/Product Name	Qty On Hand	Tax	GL Account #	Price	Additional Prices
	Fee					
ADJUST_WEB	ONLINE ADJUSTMENT		No Tax		\$0.00	
DELIV	Delivery Charge		Tax Exempt		\$0.00	
RELAY	Relay Fee		Tax Exempt		\$7.95	
RETRANS	Retrans Fee		Tax Exempt		\$0.00	
SERVICE	Service Charge		Tax Exempt		\$0.00	
SYS_DELIVER	SYS_DELIVERY				\$0.00	
SYS_RELAY	SYS_RELAY				\$0.00	
SYS_RETRANS	SYS_RETRANS				\$0.00	
SYS_SERVICE	SYS_SERVICE				\$0.00	
	Other					
**Gift Card	**Gift Card				\$0.00	\$0.00 \$0.00
A1	The FTD Fall Harvest Bouquet	1			\$39.99	
A2	The FTD Autumn Splendor Bouquet	1			\$49.99	
B1	The FTD Bosses' Day Bouquet	1			\$39.99	
B1-3700	The FTD Winter Elegance Bouquet - Jan	1			\$30.99	
B1-3701	The FTD Pink Lily Bouquet - February	1			\$33.99	
B1-3702	The FTD Morning Joy Bouquet - March	1			\$30.99	
B1-3703	The FTD First Blooms Bouquet - April	1			\$31.99	
B1-3704	The FTD Peak Of Freshness Bouquet -	1			\$31.99	
B1-3705	The FTD Happiness Bouquet - June	1			\$31.99	

Sales by Product Code Summary Report

The Sales by Product Code – Summary report lists inventory, wire out, and total sales by product category for a specified sales or delivery date or date range.

Figure 19-39: Product Sales Report – Sales by Product Code – Summary
Sales by Product Code
All Stores
 07/27/2005 - 07/27/2005
 Inventory and WireOut Sales - Summary

Category Name	Inventory Sales			Wire Out Sales			Total Sales		
	Sales Amount	Items	%-Sales	Sales Amount	Items	%-Sales	Sales Amount	Items	%-Sales
<u>Karen's Flower Shop</u>									
CARDS	38.50	11	97.61	0.00	0	0.00	38.50	11	0.00
CONTAINERS	0.00	0	0.00	0.00	0	0.00	0.00	0	0.00
OTHER	590.00	11	63.32	0.00	0	0.00	590.00	11	0.00
PERISHABLE	940.00	15	41.56	0.00	0	0.00	940.00	15	0.00
PLUSH	40.00	4	97.51	0.00	0	0.00	40.00	4	0.00
STORE TOTAL	1,608.50	41	0.00	0.00	0	0.00	1,608.50	41	0.00
FEE	177.88	23	88.94	0.00	0	0.00	177.88	23	0.00
<u>ALL STORES</u>									
GRAND TOTAL	1,608.50	41	0.00	0.00	0	0.00	1,608.50	41	0.00

Sales by Product Code Detail Report

The Sales by Product Code – Detail report is sorted by product category. Totals are provided for each product category:

Figure 19-40: Product Sales Report – Sales by Product Code – Detail

Sales by Product Code
MARGIE'S FLOWERS
 Sale Date 01/11/2008 - 02/11/2008
 All Categories

Prod Code	Name	Description	Total Sales		
			Sales Amount	Items	%-Sales
MARGIE'S FLOWERS					
Arrangements					
a	CENTERPIECE ARR.	CENTERPIECE ARR.	\$1,899.61	47	3.82%
A-CON	CONTAINER ARR	CONTAINER ARR	\$1,573.35	31	3.16%
A-S	SEASONAL ARR.	SEASONAL ARR.....tf 11-2 Red Roses with white dendrobs Make very artsy looking VASE ARR....from our web site.....Elegant Tribute	\$25.00	51	0.05%
A-V	VASE ARR.	Customer would like white lilles	\$3,578.03	80	7.19%
AR-BV	BUD VASE ARR.	BUD VASE ARR.	\$45.00	2	0.09%
C-C	COURSAGE	COURSAGE	\$10.00	1	0.02%
Category Total			\$7,130.99	212	14.33%
Balloons					
B-BA	BALLOON BOUQUET	BALLOON BOUQUET	\$90.00	18	0.18%
B-L	LATEX BALLOON	LATEX BALLOON	\$21.50	2	0.04%
B-M	MYLAR BALLOON	MYLAR BALLOON	\$66.00	8	0.13%
Category Total			\$177.50	28	0.36%
Blooming Plants					
BP-AZ	AZALEA	AZALEA	\$69.94	2	0.14%
BP-BEG	BEGONIA	BEGONIA	\$24.50	1	0.05%
BP-BP	BASKET PLANTERS	BASKET PLANTERS	\$374.94	7	0.75%
BP-GEN	BLOOMING PLANT-	BLOOMING PLANT-	\$617.50	16	1.24%
BP-HYG	HYDRANGEAS	HYDRANGEAS	\$460.00	21	0.92%
BP-KAL	KALANCHOE	KALANCHOE	\$47.50	5	0.10%
BP-OR	ORCHID	ORCHID	\$89.00	1	0.18%
Category Total			\$1,683.38	53	3.38%

Product Sales Report by Date by Occasion by Product Summary Report

The Sales by Date, Occasion, and Product – Summary report lists inventory, wire out, and total sales by occasion for a specified sale or delivery date or date range.

Figure 19-41: Product Sales Report – Sales by Date, Occasion, and Product – Summary**Product Sales Report by Date by Occasion by Product****MARGIE'S FLOWERS**

Sale Date 01/11/2008 - 02/11/2008

All Categories

Occasion	Inventory Sales		Wire Out Sales		Total Sales	
	Sales Amt.	%	Sales Amt.	%	Sales Amt.	%
<u>MARGIE'S FLOWERS</u>						
Sympathy	6,685.01	13.9%	437.60	27.3%	7,122.61	14.3%
Illness	6,328.18	13.1%	230.99	14.4%	6,559.17	13.2%
Birthday	6,018.72	12.5%	70.00	4.4%	6,088.72	12.2%
Business Gifts	89.99	0.2%	0.00	0.0%	89.99	0.2%
Holiday	12,025.32	25.0%	171.98	10.7%	12,197.30	24.5%
Maternity	1,388.13	2.9%	175.94	11.0%	1,564.07	3.1%
Anniversary	1,335.84	2.8%	40.00	2.5%	1,375.84	2.8%
Other	14,285.03	29.7%	474.07	29.6%	14,759.10	29.7%
Store Total	48,156.22	100.0%	1,600.58	100.0%	49,756.80	100.0%
<u>ALL STORES</u>						
Grand Total	48,156.22	100.0%	1,600.58	100.0%	49,756.80	100.0%

Product Sales Report by Date by Occasion by Product Detail Report

The Sales by Date, Occasion, and Product – Detail report is sorted by occasion:

Figure 19-42: Product Sales Report – Sales by Date, Occasion, and Product – Detail**Product Sales Report by Date by Occasion by Product****MARGIE'S FLOWERS**

Sale Date 01/11/2008 - 01/14/2008

All Categories

Occasion	Prod Code	Name	Description	Total Sales	
				Sales Amt.	%
<u>MARGIE'S FLOWERS</u>					
<u>Sympathy</u>					
			VASE ARR....from our web site.....Elegant Tribute□		
A-V	VASE ARR.		Customer would like white lilles	110.00	2.8%
BP-GEN	BLOOMING PLANT-		BLOOMING PLANT-	55.00	1.4%
C33-2960	The FTD White Assortment Basket			49.99	1.3%
C6-3067	The FTD Festive Wishes Bouquet			24.99	0.6%
FB	FRUIT BASKET		FRUIT BASKET	144.98	3.7%
S21-3156	The FTD Quiet Tribute Standing Spray			136.49	3.5%
WIRE	Wire			60.01	1.5%
Occasion Total:				581.46	15.0%

Generating Product Sales Reports

TASK To generate the Product Sales Report:

- 1 On the FTD Mercury Main Menu, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Product Sales Report** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 Complete the options on the **Product Sales Report** window.
- 6 Click **Finish**. The report generates and opens in Excel.
- 7 To print your report from Excel, on the **File** menu, click **Print**.
- 8 If you want to save the report from Excel, on the **File** menu, click **Save**.

Product Sales Report Window

The **Product Sales Report** window allows you to configure settings for the Product Sales report. When you have finished configuring settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-43: Product Sales Report Window

The screenshot shows the 'FTD Mercury - Product Sales Report' dialog box. It is configured with the following settings:

- Select Store:** All Stores
- Product Report:** Sales by Date, Occasion and Product
- Report Type:** Summary Report
- Product Categories:** All Categories
- Sale Type:** Inventory
- Date Range:** Start Date: 2 / 4 /2008, End Date: 3 / 4 /2008
- Date Type:** Delivery Date

Buttons at the bottom: Finish, Cancel

The Product Sales Report window contains the following settings.

Table 19-17: Product Sales Report Window Settings

Setting	Description
Select Store	From this list, select the store for which you want to generate the report. If you have multiple stores, you can select All Stores.
Product Report	Select whether you want to generate a Product List report, a Sales by Product Code report, or Sales by Date, Occasion, and Product report.
Report Type	Select whether you want to generate a detail report or a summary report.
Product Categories	Select whether you want to include all product categories in the report or select product categories from the list to include.
Sale Type	Select whether you want to include inventory, wire out, or both sale types in your report.
Start Date	Enter the start date for this report.
End Date	Enter the end date for this report.
Date Type	<p>If you selected Sales by Product Code or Sales by Date, Occasion and Product, you need to specify the date types you want to include in the report. You can select one of the following:</p> <ul style="list-style-type: none"> » Delivery Date—when this is selected, orders completed with a delivery date within the date range selected for the report will be included. » Sale Date—when this is selected, orders completed within the date range selected for the report will be included.

Reciprocity Report

The **Reciprocity Report** provides you with an analysis of your reciprocity statistics by wire service. It prints the total number of orders and the dollar amount of orders that you have sent and received for each shop code for the month in which the order messages were sent.

Figure 19-44: Reciprocity Report

Reciprocity Report Wire Type: FTD for April 2002							
Member Number	Shop Name	Orders Sent		Orders Received		Differential	
		Count	Amount	Count	Amount	Count	Amount
90-0134AW	JENNIE'S FLOWERS & GIFTS	2	92.50	0	0.00	-2	-92.50
90-9999AA	BOB'S FLORIST	1	45.10	0	0.00	-1	-45.10
90-1234AA	ALICE'S GREENHOUSE	0	0.00	1	65.10	1	65.10
90-2345AA	THE FLOWER SHOP	2	82.00	4	196.10	2	114.00
				Count	5	Grand Total	41.50

Generating a Reciprocity Report

TASK To generate a Reciprocity Report:

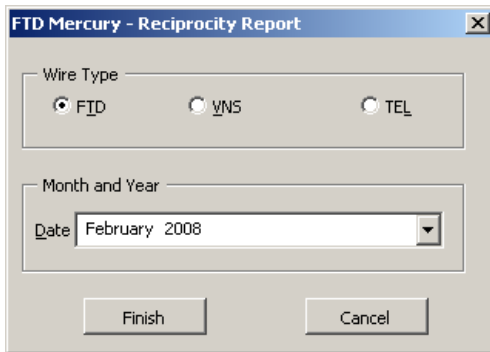
- 1 On the FTD Mercury Main Menu, click **Business Reports**.
- 2 Double-click **Mercury Forms**.

- 3 Double-click on the **Reciprocity Report** icon to open the template.
- 4 If a window opens asking whether you want to enable or disable macros, click **Enable Macros**.
- 5 In the **Wire Type** area, select the wire service for the florists that you want to print reciprocity statistics.
- 6 In the **Date** field, click the arrow and select the date through which you want to print reciprocity statistics.
- 7 Click **Finish**. The report opens in Microsoft Excel.
- 8 To print your report from Excel, on the **File** menu, click **Print**.
- 9 If you want to save the report from Excel, on the **File** menu, click **Save**.

Reciprocity Report Window

The **Reciprocity Report** window allows you to configure settings for your Reciprocity report. When you have finished configuring settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-45: Reciprocity Report Window



The Reciprocity Report window contains the following settings.

Table 19-18: Reciprocity Report Window Settings

Setting	Description
Wire Type	Select the wire service for which you want to generate the reciprocity statistics.
Month and Year	Select the month and year for this report.

Report of Orders Filled

The **Report of Orders Filled** lists all incoming orders that you filled and entered in your system over a chosen delivery date or date range. The report also provides the grand total number of orders filled and the dollar amount associated with the orders.

Figure 19-46: Report of Orders Filled

Report of Orders Filled						
Shop Code: 90-0134AQ						
05/22/2002 through 05/30/2002						
Report# 200005301313						
#	Sending Number	Delivery Date	Recipient Name	Occasion Code	Dollar Amount	Status
1	90-0001AF	5/22/00	Nancy Martin	Birthday	45.10	Sent
2	90-0001AF	5/27/00	Peter Neufeld	Birthday	25.10	Sent
3	90-0001AF	5/30/00	Suzie Rizzio	Anniversary	50.00	Sent
Count				3		
Grand Total					120.00	

Generating the Report of Orders Filled

TASK To generate the Report of Orders Filled:

- 1 On the FTD Mercury Main Menu, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Report Orders Filled** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 In the **Selection Type** section, select whether you want to display orders filled by **Shop Code** or **Wire Service**.
- 6 If you selected **Shop Code** in the **Selection Type** section, click the arrow in the **Shop Code** field and select the shop for which you want to print orders filled. If you want to print orders filled for all shop codes, select **All Shop Codes**.
- 7 If you selected **Wire Service** in the **Selection Type** section, click the arrow in the **Wire** field and select the wire service for which you want to print orders filled. If you want to print orders filled for all wire services, select **All Wire Services**.
- 8 In the **Delivery Date Range** section, select the start and end dates for the delivery dates.
- 9 Click **Finish**. The report generates and opens in Excel.
- 10 To print your report from Excel, on the **File** menu, click **Print**.
- 11 If you want to save the report from Excel, on the **File** menu, click **Save**.

Report of Orders Filled Window

The **Report of Orders Filled** window allows you to configure settings for the Report of Orders Filled.

Figure 19-47: Report of Orders Filled Window

The Report of Orders Filled window contains the following settings.

Table 19-19: Report of Orders Filled Window Settings

Setting	Description
Selection Type	Select to report on orders by shop code or wire service.
Shop Code	If you selected to report on orders by shop code, select the code for the orders to include in the report or select to include all codes.
Wire	If you selected to report on orders by wire service, select the wire service for the orders to include in the report or select to include all wire service types.
Delivery Date Range	Select the delivery start and end dates to be included in the report.

Sales by Referral Code Report

The **Sales By Referral Code** report lists total sales by referral code for a given sales date or date range. Referral codes are entered in Order Entry or Point of Sale in the payment screen at the time of sale. If a referral code is not entered at the time of sale, the referral code from the **Customer Detail Information** window is used (the customer detail that is accessed through a customer search). All Order Entry and Point of Sale transactions are included on the report.

- » The **Summary Report** lists each referral code and the total dollar amount of sales generated from each referral code. It then lists a grand total for all referral codes.
- » The **Detail Report** lists each customer with the given referral code, and the dollar amount that the customer has spent for the given date range.

Figure 19-48: Sales By Referral Code Report - Detail

Sales by Referral Code				
Leslie's Flowers and Gifts				
04/08/2002 - 04/08/2002				
Sort By: Sort Name				
Detail				
Marketing criteria: Account Type (Personal)				
Cust No.	Customer Name	Phone No.	Total	
<u>Leslie's Flowers and Gifts</u>				
Friend				
AhernKa	Kari Ahern	630-555-2829	49.02	
HolzeJa	Jaime Holzer	630-555-0219	55.30	
JonesPa	Paul Jones	630-555-7783	29.01	
MaysCa	Carrie Mays	630-555-5590	5.59	
MilleCh	Chris Miller	630-555-2091	133.10	
SubTotal:			272.02	
Newspaper				
CarreJe	Jennifer Carrey	630-555-0092	96.89	
JohnsLe	Leslie Johnson	630-555-7391	55.13	
RodriJo	Joe Rodriguez	630-555-3019	121.40	
ScanlMe	Melissa Scanlon	630-555-8820	44.89	
WhiteHo	Hollie White	630-555-4092	79.35	
SubTotal:			397.56	
TV Ad				
BrownJo	John Brown	630-555-2900	239.68	
CarreLi	Linda Carrey	630-555-3499	101.45	
Rosinni	Rosinni's Restaurant	630-555-3333	98.34	
SubTotal:			439.47	
Other				
BrennJe	Jeff Brenner	630-555-5783	102.20	
OMailCa	Carrie O'Malley	630-555-3579	33.90	
PatakLe	Les Pataki	630-555-9761	87.75	
ResenAm	Amie Resendiz	630-555-4730	79.99	
SbragLi	Lisa Sbragia	630-555-3760	201.45	
SkobeCa	Carol Skobel	630-555-3892	34.76	
SmithKr	Kristie Smith	630-555-9827	33.90	
ZeskiEd	Ed Zeskie	630-555-3792	138.09	
SubTotal:			712.04	
Total:			1,821.09	

Figure 19-49: Sales By Referral Code Report - Summary

Sales By Referral Code	
Leslie's Flowers and Gifts	
04/08/2002 - 04/08/2002	
Sort By: Sort Name	
Summary	
Marketing criteria: Account Type (Personal)	
Referral Code	Total
<u>Leslie's Flowers and Gifts</u>	
Friend	272.02
Newspaper	397.56
TV Ad	439.47
Other	712.04
Total:	1,821.09

Generating the Sales by Referral Code Report

TASK To generate the Sales by Referral Code report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click the **Mercury Forms** icon on your desktop.
- 3 Double-click on the **Sales by Referral Code Report** icon to open the template.
- 4 If a window opens asking whether you wish to enable macros, click **Enable Macros**.
- 5 If you receive the message "This application is about to initialize ActiveX controls..." click **OK**.
- 6 In the **Select Store** field, click the arrow and select the store's data that you want to use for the report.
- 7 In the **Start Date** field of the **Date Range** section, click the arrow and choose the date on which you wish to start analyzing sales information. In the **End Date** field, click the arrow and choose the date on which you wish to end analyzing sales summary information.
- 8 In the **Report Type** area, select if you want to print the **Detail Report** or **Summary Report**.
- 9 If you want to print customers with particular marketing types, click **Marketing Criteria Selection** so that a check mark appears (otherwise leave this option unchecked). This allows you to filter customer information so that, for example, you can print only Business accounts in the report. (If this area is blank, it means that you have no marketing categories set up. See [Marketing Screen](#) on page 24-21 for information on setting up these categories.)
To select marketing categories to print, first click on a category so that a drop-down arrow displays. Click this arrow to display a drop-down list of marketing types. Then check which types you want to print.
To print only customers with no marketing information specified in the **Customer Detail Information** window, first check the **Marketing Criteria Selection** option so that a check mark appears, then check **Customers with No Marketing Criteria**.
- 10 Select how you want to sort the report: by **Sort Name** (customer name), **Amount**, or **Last Purchase Date**.
- 11 Click **Finish**.
- 12 To print your report from Excel, on the **File** menu, click **Print**.
- 13 If you want to save the report from Excel, on the **File** menu, click **Save**.

Sales by Referral Code Report Window

The **Sales by Referral Code Report** window allows you to configure settings for the Sale by Referral Code report. When you have finished configuring settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-50: Sales by Referral Code Report Window

The Sales by Referral Code Report window contains the following settings.

Table 19-20: Sales by Referral Code Report Window Settings

Setting	Description
Select Store	From this list, select the store for the report. If you have multiple stores, you can select All Stores.
Date Range	Select the sales start and end dates for the report.
Report Types	Select whether you are generating the Detail or Summary report.
Marketing Criteria Selection	If you select this option, you can filter the report so it includes customers with specific marketing criteria or no marketing criteria. If you select Customers with Marketing Criteria, you can select the marketing categories to include.
Sort Option	You can select to sort the report by Sort Name, the Last Purchase Date, or by Amount.

Sales Summary Report

The **Sales Summary** report summarizes total completed sales for your store for a given sale or delivery date or date range. Information in the Sales Summary is reported on an accrual basis. Because the Sales Summary reports information by statement categories, such as merchant amount, delivery charge, or discount amounts, information in the Sales Summary is comparable to information in the Sales Tax report, if the Sales Tax report is run on an accrual basis for the same reporting period and date type (delivery date or sale date).

The Sales Summary report has several parts.

- » **Order Entry/Manual** - shows total sales, gift certificates purchased and redeemed, outgoing and incoming sales according to wire service, and payments received for Order Entry and manual tickets.
- » **POS** - shows total sales, gift certificates purchased and redeemed, outgoing and incoming sales according to wire service, and payments received for Point of Sale. In order for this section of the report to appear, you must be configured to use POS.
- » **Total Sales** - shows combined totals for Order Entry/manual tickets and Point of Sale.
- » **Other** - shows finance charges and manual entry for POS systems that are not part of FTD Mercury.
- » **Store Transfers** - lists store transfers. In order for data to appear in this section of the report, store transfer journal entries must have been created. For more information, see [Store Transfers Screen](#) on page 24-22.

Order Entry/Manual, POS, and Total Sales

These sections of the report show the number of sales, merchant product charge, other chargers, coupons, discounts, and tax for total sales as well as for subcategories such as gift certificates, wire sales, and payments received.

Figure 19-51: Sales Summary Report Order Entry/Manual Section

Sales Summary Report
 MARGIE'S FLOWERS
 02/06/2008 - 03/06/2008
 Date Type - Delivery Date

Order Entry/Manual	Units	Merch Amount	Delivery Charges	Relay Charges	Service Charges	Coupons	Discount Amount	Total Without Tax	Sales Tax	Total	(%) Percentage
Total Sales Summary											
Cash Sales	2	38.95	10.00	0.00	0.00	0.00	0.00	48.95	0.00	48.95	2.92
House Charge Sales	26	1,266.93	206.14	7.95	0.00	0.00	0.04	1,480.98	0.00	1,480.98	100.00
Manual Ticket Sales	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Debit Memos	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Credit Memos	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Credit Card Sales	99	5,421.37	914.87	26.30	5.00	0.00	0.00	6,367.54	0.00	6,367.54	56.00
Preauthorized Credit Card Sales	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Incoming Wire Sales	658	34,883.92	6,914.00	0.00	0.00	0.00	0.00	41,797.92	0.00	41,797.92	95.14
Total Sales	785	41,611.17	8,045.01	34.25	5.00	0.00	0.04	49,695.39	0.00	49,695.39	85.00
Gift Certificate/Card Summary											
Total Gift Certificates Purchased	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Gift Cards Purchased	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Certificate/Cards Purchased	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Gift Certificates Redeemed	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Gift Cards Redeemed	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Certificates/Cards Redeemed	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Outgoing Sales											
Total Outgoing Sales	5	224.92	66.96	15.90	0.00	0.00	0.00	307.78	0.00	307.78	37.33
Total Pending Outgoing Sales	2	86.90	15.00	18.35	0.00	0.00	0.00	120.25	0.00	120.25	100.00
Total Local Sales	778	41,299.35	7,963.05	0.00	5.00	0.00	0.04	49,267.36	0.00	49,267.36	85.66
Incoming Sales Summary											
FTD	614	32,526.01	6,494.50	0.00	0.00	0.00	0.00	39,020.51	0.00	39,020.51	95.13
TEL	44	2,357.91	419.50	0.00	0.00	0.00	0.00	2,777.41	0.00	2,777.41	95.27
AFS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
VNS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
BLM	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Incoming Sales	658	34,883.92	6,914.00	0.00	0.00	0.00	0.00	41,797.92	0.00	41,797.92	95.14
Outgoing Wire Summary											
FTD	5	224.92	66.96	15.90	0.00	0.00	0.00	307.78	0.00	307.78	37.33
TEL	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
AFS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
VNS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
BLM	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Outgoing Sales	5	224.92	66.96	15.90	0.00	0.00	0.00	307.78	0.00	307.78	37.33
Payments Received											
Cash & Check Payments	8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	663.90	0.00
Credit Card Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Debit Card Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gift Certificate Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Write Offs	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Payments	8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	663.90	0.00

Figure 19-52: Sales Summary Report POS Section

Sales Summary Report
MARGIE'S FLOWERS
02/06/2008 - 03/06/2008
Date Type - Delivery Date

POS	Units	Merch Amount	Delivery Charges	Relay Charges	Service Charges	Coupons	Discount Amount	Total Without Tax	Sales Tax	Total	(%) Percentage
Total Sales Summary											
Cash Sales	65	1,589.22	37.50	7.95	0.00	0.00	5.50	1,629.17	0.00	1,629.17	97.08
House Charge Sales	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Manual Ticket Sales	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Debit Memos	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Credit Memos	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Credit Card Sales	108	4,759.62	199.75	63.75	0.00	0.00	19.90	5,003.22	0.00	5,003.22	44.00
Debit Card Sales	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Incoming Wire Sales	36	1,750.59	384.50	0.00	0.00	0.00	0.00	2,135.09	0.00	2,135.09	4.86
Total Sales	209	8,099.43	621.75	71.70	0.00	0.00	25.40	8,767.48	0.00	8,767.48	15.00
Gift Certificate/Card Summary											
Total Gift Certificates Purchased	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Gift Cards Purchased	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Certificate/Cards Purchased	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Gift Certificates Redeemed	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Gift Cards Redeemed	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Certificates/Cards Redeemed	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Outgoing Sales	7	399.57	45.45	71.70	0.00	0.00	0.00	516.72	0.00	516.72	62.67
Total Pending Outgoing Sales	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Local Sales	202	7,699.86	576.30	0.00	0.00	0.00	25.40	8,250.76	0.00	8,250.76	14.34
Incoming Sales Summary											
FTD	33	1,641.09	356.00	0.00	0.00	0.00	0.00	1,997.09	0.00	1,997.09	4.87
TEL	3	109.50	28.50	0.00	0.00	0.00	0.00	138.00	0.00	138.00	4.73
AFS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
VNS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
BLM	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Incoming Sales	36	1,750.59	384.50	0.00	0.00	0.00	0.00	2,135.09	0.00	2,135.09	4.86
Outgoing Wire Summary											
FTD	7	399.57	45.45	71.70	0.00	0.00	0.00	516.72	0.00	516.72	62.67
TEL	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
AFS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
VNS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
BLM	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Outgoing Sales	7	399.57	45.45	71.70	0.00	0.00	0.00	516.72	0.00	516.72	62.67
Payments Received											
Cash & Check Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Credit Card Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Debit Card Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gift Certificate Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Write Offs	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Figure 19-53: Sales Summary Report Total Sales Section

Sales Summary Report
MARGIE'S FLOWERS
02/06/2008 - 03/06/2008
Date Type - Delivery Date

Total Sales	Units	Merch Amount	Delivery Charges	Relay Charges	Service Charges	Coupons	Discount Amount	Total Without Tax	Sales Tax	Total	(%) Percentage
Total Sales Summary											
Cash Sales	67	1,628.17	47.50	7.95	0.00	0.00	5.50	1,678.12	0.00	1,678.12	100.00
House Charge Sales	26	1,266.93	206.14	7.95	0.00	0.00	0.04	1,480.98	0.00	1,480.98	100.00
Manual Ticket Sales	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Debit Memos	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Credit Memos	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Credit Card Sales	207	10,180.99	1,114.62	90.05	5.00	0.00	19.90	11,370.76	0.00	11,370.76	100.00
Debit Card Sales	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Incoming Wire Sales	694	36,634.51	7,298.50	0.00	0.00	0.00	0.00	43,933.01	0.00	43,933.01	100.00
Total Sales	994	49,710.60	8,666.76	105.95	5.00	0.00	25.44	58,462.87	0.00	58,462.87	100.00
Gift Certificate/Card Summary											
Total Gift Certificates Purchased	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Gift Cards Purchased	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Certificate/Cards Purchased	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Gift Certificates Redeemed	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Gift Cards Redeemed	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Certificates/Cards Redeemed	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Outgoing Sales	12	624.49	112.41	87.60	0.00	0.00	0.00	824.50	0.00	824.50	100.00
Total Pending Outgoing Sales	2	86.90	15.00	18.35	0.00	0.00	0.00	120.25	0.00	120.25	100.00
Total Local Sales	980	48,999.21	8,539.35	0.00	5.00	0.00	25.44	57,518.12	0.00	57,518.12	100.00
Incoming Sales Summary											
FTD	647	34,167.10	6,850.50	0.00	0.00	0.00	0.00	41,017.60	0.00	41,017.60	100.00
TEL	47	2,467.41	448.00	0.00	0.00	0.00	0.00	2,915.41	0.00	2,915.41	100.00
AFS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
VNS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
BLM	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Incoming Sales	694	36,634.51	7,298.50	0.00	0.00	0.00	0.00	43,933.01	0.00	43,933.01	100.00
Outgoing Wire Summary											
FTD	12	624.49	112.41	87.60	0.00	0.00	0.00	824.50	0.00	824.50	100.00
TEL	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
AFS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
VNS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
BLM	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Outgoing Sales	12	624.49	112.41	87.60	0.00	0.00	0.00	824.50	0.00	824.50	100.00
Payments Received											
Cash & Check Payments	8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	663.90	100.00
Credit Card Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Debit Card Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Gift Certificate Payments	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Write Offs	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Payments	8	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	663.90	100.00

The Sales Summary report Order Entry/Manual, POS, and Total Sales sections contain the following fields.

Table 19-21: Sales Summary Report Order Entry/Manual, POS, and Total Sales Sections Field Descriptions

Column	Description
Units	Number of sales of a given type.
Merch Amount	Value of the statement category Product Amount for the sales of a given type.
Delivery Charges	Value of the statement category Delivery Charge for the sales of a given type.
Relay Charges	Value of the statement category Relay Charge for the sales of a given type.
Service Charges	Value of the statement category Service Charge for the sales of a given type.
Coupons	Value of the statement category Coupon for the sales of a given type.
Discount Amount	Value of the statement category Discounts for the sales of a given type.
Total Without Tax	Sum of the sales' merchant amount, delivery charge, relay charge, and service charges less discount and coupon amounts.
Sales Tax	Value of sales tax for the sales of a given type.
Total	Sum of Total without Tax and Sales Tax for the sales of a given type.
Percentage	Percent of total sales that the row represents.
Total Sales Summary	Summarizes total sales by payment method. NOTE: When debit cards are entered in Order Entry, the sales is reported under Preauthorized Credit Card Sales. When debit cards are used in POS, the sale is reported under Debit Cards.
Gift Certificate/Card Summary	Summary of sales in which gift cards and gift certificates were purchased and redeemed.
Total Outgoing Sales	Summary of outgoing sales.
Total Pending Outgoing Sales	Summary of outgoing sales that are waiting to be transmitted.
Total Local Sales	Summary of local sales.
Incoming Sales Summary	Summarizes incoming wire sales by wire service, including phoned in orders.
Outgoing Wire Summary	Summarizes outgoing wire sales by wire service. Includes statement category types of product and delivery.
Payments Received	For amounts received for house account payments.

IMPORTANT When gift cards and gift certificates are purchased, the method of payment used is included in the Sales Summary report, and the number of these items purchased is included as well. However, because gift cards and gift certificates are prepayments for future sales, their values are only included in local or wire out sales totals when they are redeemed.

Other Section

The Other section of the Sales Summary report shows the total finance charges if statements were run. It also shows the number of sales, merchant product charge, other chargers, coupons, discounts, and tax for manual Point of Sale transactions.

Figure 19-54: Sales Summary Report Other Section

Sales Summary Report										
MARGIE'S FLOWERS										
02/06/2008 - 03/06/2008										
Date Type - Delivery Date										
Other	Units	Merch Amount	Delivery Charges	Relay Charges	Service Charges	Coupons	Discount Amount	Total Without Tax	Sales Tax	Total
Total Finance Charges	0									0.00
Total POS Manual Entries		0.00							0.00	0.00

Store Transfer Section

The Store Transfer section of the Sales Summary report shows sales transferred and sales received from transferred orders.

Figure 19-55: Sales Summary Report Store Transfer Section

Sales Summary Report										
MARGIE'S FLOWERS										
02/06/2008 - 03/06/2008										
Date Type - Delivery Date										
STORE TRANSFERS	Units	Merch Amount	Delivery Charges	Less Discounts	Total					
Value of Sales Transferred to Other Stores	0	0.00	0.00	0.00	0.00					
Income Retained	0	0.00	0.00	0.00	0.00					
Total Revenue Transferred	0	0.00	0.00	0.00	0.00					
Value of Sales Received from Other Stores	0	0.00	0.00	0.00	0.00					
Commissions Paid	0	0.00	0.00	0.00	0.00					
Total Revenue Received	0	0.00	0.00	0.00	0.00					

The Sales Summary report Store Transfer section contains the following fields.

Table 19-22: Sales Summary Report Store Transfer Field Descriptions

Column	Description
Units	Number of sales transferred to or from other stores.
Merch Amount	Value of the statement category Product Amount for the sales transferred to or from other stores. For Income Retained, Merchant Amount is calculated as the value of the statement category for Product Amount less the filling percentage.
Delivery Charges	Value of the statement category Delivery Charge for the sales transferred to or from other stores. For Income Retained, Delivery Charge is calculated as the value of the statement category for Delivery Charge less the filling percentage.
Less Discounts	Value of discounts applied to Merchant Amount or Delivery Charges on sales transferred to or from other stores.
Total	Value of transfers to and from other stores calculated as Merchant Amount plus Delivery Charges less Discounts.
Value of Sales Transferred to Other Stores	Value of merchant amount, delivery charge, and discount that the store transfers to other stores.

Table 19-22: Sales Summary Report Store Transfer Field Descriptions (cont.)

Column	Description
Income Retained	Value of merchant amount, delivery charge, and discount that the store retains. Calculated by reducing the values of sales transferred by a filling percentage.
Total Revenue Transferred	Value of sales transferred less income retained.
Value of Sales Received from Other Stores	Value of merchant amount, delivery charge, and discount that the store receives from other stores.
Commissions Paid	Value of merchant amount, delivery charge, and discount that the store receives for sales transferred to the store. Calculated by multiplying the values of sales transferred by a selling commission.
Total Revenue Received	Value of merchant amount, delivery charge, and discounts received from sales transferred to the store less the commissions paid on sales transferred to other stores.

Generating the Sales Summary Report

TASK To generate the Sales Summary report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Sales Summary Report** icon to open the template.
- 4 If a window opens asking whether you wish to enable macros, click **Enable Macros**.
- 5 When the **Sales Summary Report** window opens:
 - a. In the **Select Store** field, click the arrow and select the store's data that you want to use for the report.
 - b. In the **Start Date** field of the **Sale Date Range** area, click the arrow and choose the date on which you wish to start analyzing sales summary information.
 - c. In the **End Date** field, click the arrow and choose the date on which you wish to end analyzing sales summary information.
 - d. Select if you want to print the report according to **Delivery Date** or **Sale Date**.
 - e. Click **Finish**. The report generates and opens in Excel.
- 6 To print your report from Excel, on the **File** menu, click **Print**.
- 7 If you want to save the report from Excel, on the **File** menu, click **Save**.

Sales Summary Report Window

The **Sales Summary Report** window allows you to configure settings for the Sales Summary Report. When you have finished configuring settings, click **Finish** to generate the report and open it in Microsoft Excel.

Figure 19-56: Sales Summary Report Window



The Sales Summary Report window contains the following settings.

Table 19-23: Sales Summary Report Window Settings

Setting	Description
Select Store	From this list, select the store you want to use for the report. If you are set up as a multi-store shop, you can also select All Stores.
Sale Date Range	Select the start and end dates to use to analyze sales summary information.
Date Type	Select whether you want to print the report according to Delivery Date or Sale Date.

Sales Tax Report

The **Sales Tax** report is used to provide information to assist in completing the monthly sales tax report that you are required to file with your state or province. Although this report is beneficial in many states, each state is required to file different reports.

The **Sales Tax** report is sorted by **Taxable Sales** and **Non Taxable Sales**, and the sales tax paid for each tax code. Tax figures can be based on either delivery or sale dates. The sales tax is calculated according to the rate that you define in Mercury Administration.

You can select whether you want to print by **Accrual** or **Cash Basis**. Accrual includes dollar amounts for house account charges that have not yet been paid. Cash Basis only includes actual cash that you have received.

Figure 19-57: U.S. Sales Tax Report

Sales Tax Report						
Doc's Blooms Chicago						
July 2006 - July 2006						
Type: Accrual by Delivery Date						
Shop Name	Tax Type	Tax Code	Description	Amount	Sales Tax	Total w/Tax
Doc's Blooms Chicago						
Taxable Sales						
		IL			7.25 %	
			Product Amount	5,040.75	365.69	5,406.44
			SubTotal	5,040.75	365.69	5,406.44
		Taxable Sales Summary				
			Product Amount	5,040.75	365.69	5,406.44
Taxable Sales			Total Tax Collected:	5,040.75	365.69	5,406.44
Non Taxable Sales						
		NT			0.00 %	
			Product Amount	143.00	0.00	143.00
			SubTotal	143.00	0.00	143.00
		TE			0.00 %	
			Product Amount	723.36	0.00	723.36
			Service Charge	168.00	0.00	168.00
			Relay Charge	49.00	0.00	49.00
			Delivery Charge	1,529.00	0.00	1,529.00
			SubTotal	2,469.36	0.00	2,469.36
		Non Taxable Sales Summary				
			Product Amount	866.36	0.00	866.36
			Service Charge	168.00	0.00	168.00
			Relay Charge	49.00	0.00	49.00
			Delivery Charge	1,529.00	0.00	1,529.00
Non Taxable Sales			Total Tax Collected:	2,612.36	0.00	2,612.36
Store Total			Grand Total	7,653.11	365.69	8,018.80

If your system is set up as Canadian, the Sales Tax report will contain a section called Additional Tax Items. In it, taxes on commissions earned and taxes on orders received will be broken out based on information entered in the Canadian Sales Tax window. Additionally, there will be a section for Input Tax Credits, based on Point of Sale paid out transactions, taxes paid to the filling florists, taxes paid on commissions, taxes paid on fees and services, and taxes paid on Accounts Payable invoices.

Figure 19-58: Canadian Sales Tax Report

Sales Tax Report							
Doc's Blooms Nova Scotia							
August 2006 - August 2006							
Type: Accrual by Delivery Date							
Shop Name	Tax Type	Tax Code	Description	Amount	GST/HST	PST/QST	Total w/ Tax
Doc's Blooms Nova Scotia							
Taxable Sales							
		HST			14.00 %	0.00 %	
			Product Amount	230.00	32.20	0.00	262.20
			Delivery Charge	56.00	7.84	0.00	63.84
			SubTotal	286.00	40.04	0.00	326.04
			Taxable Sales Summary				
			Product Amount	230.00	32.20	0.00	262.20
			Delivery Charge	56.00	7.84	0.00	63.84
Taxable Sales			Total Tax Collected:	286.00	40.04	0.00	326.04
Non Taxable Sales							
		NT			0.00 %	0.00 %	
			Product Amount	137.00	0.00	0.00	137.00
			Delivery Charge	72.00	0.00	0.00	72.00
			SubTotal	209.00	0.00	0.00	209.00
			Non Taxable Sales Summary				
			Product Amount	137.00	0.00	0.00	137.00
			Delivery Charge	72.00	0.00	0.00	72.00
Non Taxable Sales			Total Tax Collected:	209.00	0.00	0.00	209.00
Additional Tax Items							
			Tax on Commissions Earned (Canadian Outgoing Orders)		0.00		0.00
			Tax on Orders Received (Canadian Incoming Orders)		0.00		0.00
Additional Tax Items			Total Tax Collected:		0.00		0.00
Store Total			Grand Total Tax Collected:	495.00	40.04	0.00	535.04
Input Tax Credits							
			Paid Outs		0.00		0.00
			Tax Paid to Filling Florist (Canadian Outgoing Orders)		0.00		0.00
			Tax Paid on Commissions (Canadian Incoming Orders)		0.00		0.00
			GST/HST Taxes Paid on Fees or Services		50.00		50.00
			GST/HST Taxes Paid on AP Invoices		100.00		100.00
Input Tax Credits			Less Input Tax Credit Total:		150.00		150.00
Store Total			Grand Total Tax Collected Less Input Tax Credits:	495.00	-109.96	0.00	385.04

Generating the U.S. Sales Tax Report

TASK To generate the Sales Tax report if you are a U.S. shop:

- 1 On the FTD Mercury Main Menu, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Sales Tax Report** icon to open the template.
- 4 If a window opens asking whether you wish you enable or disable macros, click **Enable Macros**.
- 5 When the **Sales Tax Report** window opens:
 - a. From the **Select Store** list, select the store for which you are generating the report. You can also select **All Stores** if you are configured as a multiple store shop.

- b. In the **Month and Year** area, select the starting and ending dates for the report. Data included in the report will start on the date you specify in the **Start** field and will include data up to and including data for the date you select in the **End** field.
 - c. In the **Type** area, select whether you want the data to be included based on **Accrual** or **Cash Basis**.
 - d. If you selected **Accrual** as the **Type**, in the **Date Types** area, select whether you want the dates to be based on delivery date or sales date.
 - e. Select **Delivery Date** or **Sale Date** to determine the date on which tax figures will be based.
 - f. Click **Finish**. The report generates and opens in Excel.
- 6 To print your report from Excel, on the **File** menu, click **Print**.
 - 7 If you want to save the report from Excel, on the **File** menu, click **Save**.

Generating the Canadian Sales Tax Report

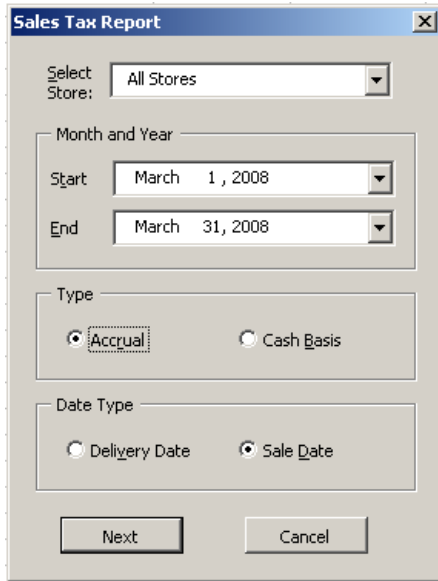
TASK To generate the Sales Tax report if you are a Canadian shop:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Sales Tax Report** icon to open the template.
- 4 If a window opens asking whether you wish you enable or disable macros, click **Enable Macros**.
- 5 When the **Sales Tax Report** window opens:
 - a. From the **Select Store** list, select the store for which you are generating the report. You can also select **All Stores** if you are configured as a multiple store shop.
 - b. In the **Month and Year** area, select the starting and ending dates for the report. Data included in the report will start on the date you specify in the **Start** field and will include data up to and including data for the date you select in the **End** field.
 - c. In the **Type** area, select whether you want the data to be included based on **Accrual** or **Cash Basis**.
 - d. If you selected **Accrual** as the **Type**, in the **Date Types** area, select whether you want the dates to be based on delivery date or sales date.
 - e. Select **Delivery Date** or **Sale Date** to determine the date on which tax figures will be based.
 - f. Click **Next**.
- 6 When the **Canadian Sales Tax** window opens, enter additional tax entries and/or input tax credits for wire service statements or accounts payable. Additional taxes entered in this window appear in the first column of the Sales Tax report, under the label defined as Federal Tax in Mercury Administration.
- 7 Click **Finish**. The report generates and opens in Excel.
- 8 To print your report from Excel, on the **File** menu, click **Print**.
- 9 If you want to save the report from Excel, on the **File** menu, click **Save**.

Sales Tax Report Window

Regardless of whether FTD Mercury is configured as a Canadian system or as a U.S. system, this window opens when you open the **Sales Tax Report** template. The settings you select determine the content of the Sales Tax report. For U.S. shops, when you click **Finish**, the report generates. For Canadian shops, clicking the **Next** button opens the **Canadian Sales Tax** window.

Figure 19-59: Sales Tax Report Window



The Sales Tax Report window contains the following settings.

Table 19-24: Sales Tax Report Settings

Setting	Description
Select Store	Select the store for which you want to generate the report. If you have multiple stores, you can select All Stores to generate a Sales Tax Report that includes data from all of your stores.
Start	Select the starting date for the report.
End	Select the ending date for the report.
Type	Select whether you want your report to include data based on one of the following types: <ul style="list-style-type: none"> » Accrual—includes dollar amounts for house account charges that have not yet been paid. If you select this option, you need to specify the Date Types you want to include. » Cash Basis—only includes actual cash you have received.
Date Types	If you selected Accrual as the Type, you need to specify the date types you want to include in the report. You can select one of the following: <ul style="list-style-type: none"> » Delivery Date—when this is selected, orders completed with a delivery date within the months selected for the report will be included. » Sale Date—when this is selected, orders completed with an entry date within the months selected for the report will be included.

Canadian Sales Tax Window

When you are generating a Sales Tax report, and you are a Canadian shop, when you click **Next** on the **Sales Tax Report** window, the **Canadian Sales Tax** window opens. This window enables you to enter additional tax entries and/or input tax credits for wire service statements or accounts payable. Additional taxes entered in this window appear in the first column of the Sales Tax report, under the label defined as Federal Tax in Mercury Administration.

Tax amounts entered in this window are included in the totals generated on the Sales Tax report regardless of whether you selected **Accrual** or **Cash Basis** as the report type in the **Sales Tax Report** window.

Figure 19-60: Canadian Sales Tax Window

The Canadian Sales Tax window contains the following settings:

Table 19-25: Canadian Sales Tax Window Settings

Field	Description
Store	Displays the name of your store. You cannot change this setting from this window.
Tax Paid to Filling Florist Canadian Outgoing Orders	Enter the taxes paid to filling florists on outgoing orders within Canada. This value can be found on your FTD Clearinghouse Statement.
Tax on Commissions Earned Canadian Outgoing Orders	Enter the taxes on commissions earned on outgoing orders within Canada. This value can be found on your FTD Clearinghouse Statement.
Tax on Orders Received Canadian Incoming Orders	Enter the taxes on orders received for incoming orders within Canada. This value can be found on your FTD Clearinghouse Statement.
Tax Paid on Commissions Canadian Incoming Orders	Enter the taxes paid on commissions for incoming orders within Canada. This value can be found on your FTD Clearinghouse Statement.
Misc. GST/HST Taxes Paid on Fees or Services	Enter the miscellaneous GST or HST taxes paid on services and fees. This value can be found on your FTD Clearinghouse Statement.
GST/HST Tax Paid on Business Related AP Invoices	Enter the amount of GST or HST taxes paid on business-related accounts payable invoices. Usually, this value is calculated in stored in your accounting software. Consult your accountant for details on the value to enter.

Standing Order Log Detail Report

The **Standing Order Log Detail Report** provides you with a list of every standing order template that has had orders generated from it during a selected delivery date range. Depending on the options selected in the FTD Mercury **Standing Order Log** window, this report may be sorted by customer, frequency, or store.

Figure 19-61: Standing Order Log Detail Report

Standing Order Log
Doc's Blooms Nova Scotia
Detail - By Customer
7/10/2006 - 8/27/2006

Customer	Recipient	Total	Recurrence Pattern	Start Date	End Date	Template ID	Creation Date	Delivery Date	Status / Order Number	Store
Ray Johnson	Heather Lawrence	\$43.32	Daily	06/30/06	07/30/06	24	07/09/06	07/10/06	272	Doc's Blooms Nova Scotia
							07/09/06	07/11/06	273	
							07/09/06	07/12/06	274	
							07/09/06	07/13/06	275	
							07/09/06	07/14/06	276	
							07/09/06	07/15/06	277	
							07/09/06	07/16/06	278	
							07/16/06	07/17/06	279	
							07/16/06	07/18/06	280	
							07/16/06	07/19/06	281	
							07/16/06	07/20/06	282	
							07/16/06	07/21/06	283	
							07/16/06	07/22/06	284	
							07/16/06	07/23/06	285	
							07/23/06	07/24/06	286	
							07/23/06	07/25/06	287	
							07/23/06	07/26/06	288	
							07/23/06	07/27/06	289	
							07/23/06	07/28/06	290	
Laura Harris	Will Menard	\$43.32	Weekly	06/30/06	07/30/06	26	07/09/06	07/14/06	313	Doc's Blooms Nova Scotia
							07/16/06	07/21/06	314	
							07/23/06	07/28/06	315	
Jeff Jin	Jenny Jin	\$43.32	Weekly	07/01/06	07/26/06	29	07/09/06	07/15/06	335	Doc's Blooms Nova Scotia
							07/16/06	07/22/06	336	
Sarah Cramer	Janet Anderson	\$4.56	Weekly	08/05/06	09/02/06	30	07/09/06	07/15/06	337	Doc's Blooms Nova Scotia
							07/16/06	07/22/06	338	
							07/23/06	07/29/06	339	
							07/30/06	08/05/06	340	
							08/06/06	08/12/06	341	
08/13/06	08/19/06	342								

The **Standing Order Log Detail Report** contains the following information:

Table 19-26: Standing Order Log Detail Report Columns

Column	Description
Customer	The name of the customer with whom the standing order template is associated.
Recipient	The recipient of the orders generated by this standing order template.
Total	The total order price for each order generated by the standing order template.
Recurrence Pattern	The frequency at which the order recurs. This does not display any additional dates added to the standing order template, nor any dates removed.
Start Date	The start date of the standing order template, and the date on which the first order was (or is to be) delivered.
End Date	The date on which the standing order template will expire. This may be different than the Last Delivery Date.
Template ID	The ID of the standing order template in the system.

Table 19-26: Standing Order Log Detail Report Columns (cont.)

Column	Description
Creation Date	The date this order was or will be generated from the standing order template.
Delivery Date	The delivery date for this order.
Status/Order Number	Either the order number for this order, or the status of the order if it either has not been created yet (Pending) or if it could not be created (Failed).
Store	The store with which the standing order template is associated.

Generating a Standing Order Log Detail Report

TASK To generate a Standing Order Log Detail report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Standing Order Log** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 In the **Standing Order Log** window, select the store for which you want to generate the report. You can also select **All Stores** to generate a report for all stores (if you are a multi-store shop).
- 6 Select whether you want the report sorted by **Customer**, **Frequency**, or **Store**.
- 7 In the **Report Type** area, select **Summary**.
- 8 In the **Date Range** area, specify the start and end dates for the range. Orders created from standing order templates during this date range will be included in the report.
- 9 Click **Finish**.
- 10 To print your report from Excel, on the **File** menu, click **Print**.
- 11 If you want to save the report from Excel, on the **File** menu, click **Save**.

Standing Order Report Window

The **Standing Order Report** window allows you to customize the Standing Order Log Summary and Standing Order Log Detail reports.

Figure 19-62: Standing Order Report Window



The Standing Order Report window contains the following settings.

Table 19-27: Standing Order Report Window Settings

Setting	Description
Select Store	Select the store for which you are generating the Standing Order Log Summary report. If you are multi-store, you can also select All Stores to generate a combined list.
Sort By	Select whether you want to sort the report by customer, store, or frequency (recurrence pattern).
Report Type	Select whether you want to generate a Detail report or a Summary report.
Date Range	If you are creating a Detail report, specify a date range. The report will include all orders created from standing order templates in the range.

Standing Order Log Summary Report

The **Standing Order Log Summary** report provides you with a list of all open standing orders for a store (or all stores if you are a multi-store shop), sorted by customer, frequency, or store.

Figure 19-63: Standing Order Log Summary Report

Standing Order Log
Doc's Blooms Nova Scotia
Summary - By Customer

Customer	Recipient	Total	Recurrence Pattern	Start Date	End Date	Next Generation Date	Previous Delivery Date	Next Delivery Date	Last Delivery Date	Store
Ray Johnson	Heather Lawrence	\$43.32	Daily	06/30/06	07/30/06		07/30/06		07/30/06	Doc's Blooms Nova Scotia
Laura Harris	Will Menard	\$43.32	Weekly	06/30/06	07/30/06		07/28/06		07/28/06	Doc's Blooms Nova Scotia
Jeff Jin	Jenny Jin	\$43.32	Weekly	07/01/06	07/26/06		07/22/06		07/22/06	Doc's Blooms Nova Scotia
Sara Cramer	Janet Anderson	\$4.56	Weekly	08/05/06	09/02/06		09/02/06		09/02/06	Doc's Blooms Nova Scotia
Ted James	Missy James	\$30.78	Weekly	07/06/06	08/06/06		08/03/06		08/03/06	Doc's Blooms Nova Scotia
Larry Smith	Stephanie Jones	\$30.78	Daily	06/29/06	07/27/06		07/27/06		07/27/06	Doc's Blooms Nova Scotia
Dwight Vernon	Erika Vernon	\$26.22	Daily	06/29/06	09/28/06		09/28/06		09/28/06	Doc's Blooms Nova Scotia
Dwight Vernon	Karen Vernon	\$26.22	Weekly	06/29/06	07/29/06		07/27/06		07/27/06	Doc's Blooms Nova Scotia
Barry Woods	Michelle Woods	\$16.00	Weekly	07/06/06	08/06/06		08/03/06		08/03/06	Doc's Blooms Nova Scotia
Marc Turner	Nora Turner	\$27.00	Weekly	07/21/06	08/21/06		08/18/06		08/18/06	Doc's Blooms Nova Scotia
Tom Jin	Brenda Jin	\$43.32	Weekly	07/04/06	07/30/06		07/25/06		07/25/06	Doc's Blooms Nova Scotia
Chris Jones	Melinda Jones	\$43.32	Daily	06/29/06	07/08/06		07/08/06		07/08/06	Doc's Blooms Nova Scotia
Adam Solberg	Andy Solberg	\$8.00	Daily	07/14/06	08/14/06		08/14/06		08/14/06	Doc's Blooms Nova Scotia
Wil Nowicki	Stacy Nowicki	\$31.92	Daily	06/29/06	07/29/06		07/06/06		07/06/06	Doc's Blooms Nova Scotia
David Black	Renee Black	\$4.56	Daily	07/05/06	08/05/06		08/05/06		08/05/06	Doc's Blooms Nova Scotia
Rachel Adamski	Tim Adamski	\$30.78	Weekly	06/28/06	08/28/06		08/24/06		08/24/06	Doc's Blooms Nova Scotia
Bruce O'Keefe	Kelly O'Keefe	\$30.78	Daily	06/28/06	07/28/06		06/28/06		06/28/06	Doc's Blooms Nova Scotia
Robert Morgan	Carrie Morgan	\$57.00	Weekly	06/28/06	07/28/06		07/26/06		07/26/06	Doc's Blooms Nova Scotia

The Standing Order Log Summary report contains the following information:

Table 19-28: Standing Order Log Summary Report Columns

Column	Description
Customer	The name of the customer with whom the standing order template is associated.
Recipient	The recipient of the orders generated by this standing order template.
Total	The total order price for each order generated by the standing order template.
Recurrence Pattern	The frequency at which the order recurs. This does not display any additional dates added to the standing order template, nor any dates removed.
Start Date	The start date of the standing order template, and the date on which the first order was (or is to be) delivered.
End Date	The date on which the standing order template will expire. This may be different than the Last Delivery Date.
Next Generation Date	The date on which the next order is to be generated by this standing order template.
Previous Delivery Date	The delivery date for the most recent order generated by this standing order template.
Next Delivery Date	The date the next order generated by the standing order template is scheduled for delivery.
Last Delivery Date	The final delivery date for orders generated by this template.
Store	The store with which the standing order template is associated.

Generating a Standing Order Log Summary Report

TASK To generate a Standing Order Log Summary report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Standing Order Log** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 In the **Standing Order Log** window, select the store for which you want to generate the report. You can also select **All Stores** to generate a report for all stores (if you are a multi-store shop).
- 6 Select whether you want the report sorted by **Customer**, **Frequency**, or **Store**.
- 7 In the **Report Type** area, select **Summary**.
- 8 Click **Finish**. The report generates and opens in Excel.
- 9 To print your report from Excel, on the **File** menu, click **Print**.
- 10 If you want to save the report from Excel, on the **File** menu, click **Save**.

Tax Exempt Customer Report

The **Tax Exempt Customer** report lists all tax exempt customers that have had sales within the specified date range. It lists the customer ID and name, phone number, tax exempt ID and the sales tax paid (if any), and the total dollar amount spent. A grand total of sales without tax is also displayed at the bottom of the report.

- » The **Detail Report** lists each tax exempt customer, as well as all of the customer's transactions within the specified date range. The report also lists the date of each transaction, and the transaction type and dollar amount.
- » The **Summary Report** lists each tax exempt customer that had transactions within the specified date range, and the total dollar amount spent.

Figure 19-64: Tax Exempt Customer Report - Detail

Tax Exempt Customer Report						
Leslie's Flowers and Gifts						
Detail - Exclude Wire Service Accounts						
06/08/2002 - 06/31/2002						
Cust No. Sale ID	Customer Name	Date	Phone No. Transaction Type	Tax Exempt ID	Sales Tax1	Total Amt
<u>Leslie's Flowers and Gifts</u>						
StMary 0000388	St Mary Parish	06/10/2002	630-555-1212 Order Entry	TE	0.00	75.10
0000424		06/14/2002	Order Entry		0.00	45.10
Totals without Tax					0.00	120.00
TwinGro 0000599	Twin Groves High	06/17/2002	630-555-6800 Order Entry	TE	0.00	50.00
Totals without Tax					0.00	50.00
Grand Total without Tax					0.00	170.00

Figure 19-65: Tax Exempt Customer Report - Summary

Tax Exempt Customer Report					
Leslie's Flowers and Gifts					
Summary - Exclude Wire Service Accounts					
06/08/2002 - 06/31/2002					
Cust No.	Customer Name	Phone No.	Tax Exempt ID	Sales Tax1	Total Amt
<u>Leslie's Flowers and Gifts</u>					
StMary	St Mary Parish	630-555-1212	TE	0.00	120.00
TwinGro	Twin Groves High	630-555-6800	TE	0.00	50.00
Grand Total without Tax				0.00	170.00

Generating the Tax Exempt Customer Report

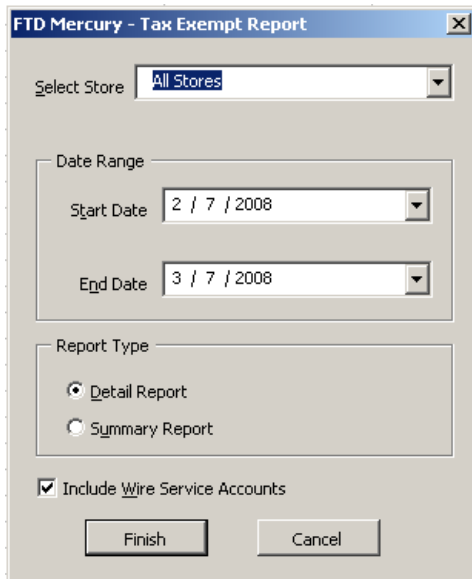
TASK To generate the Tax Exempt Customer report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Tax Exempt Customer Report** icon to open the template.
- 4 If a window opens asking whether you wish you enable or disable macros, click **Enable Macros**.
- 5 When the **Tax Exempt Customer Report** window opens:
 - a. In the **Select Store** field, click the arrow and select the store's data that you want to use for the report.
 - b. In the **Start Date** field of the **Date Range** section, click the arrow and select the sale date to begin printing tax information.
 - c. In the **End Date** field, click the arrow and select the sale date to end printing tax information.
 - d. Select the report type, **Detail** or **Summary**.
 - e. If you want to include wire service accounts in the report, select **Include Wire Service Accounts** so that a check mark appears.
 - f. Click **Finish**. The report generates and opens in Excel.
- 6 To print your report from Excel, on the **File** menu, click **Print**.
- 7 If you want to save the report from Excel, on the **File** menu, click **Save**.

Tax Exempt Report Window

The **Tax Exempt Report** window allows you to configure settings for the Tax Exempt report. When you have finished configuring settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-66: Tax Exempt Customer Report Window



The Tax Exempt Report window contains the following settings.

Table 19-29: Tax Exempt Report Window Settings

Setting	Description
Select Store	Select the store for which you want to generate the report. If you have multiple stores, you can select All Stores to generate a report that includes data from all of your stores.
Date Range	Select the sales start and end dates for the report.
Report Type	Select whether you want to generate a summary or detail report.
Include Wire Service Accounts	Check the box to include wire service accounts in the report.

Ticket Report

The **Ticket** report provides you with an analysis of each ticket type, the products ordered on each ticket, and the cost and quantity of products ordered per ticket, for the given sales date or date range. You can select which ticket types you want to include: Order Entry, Manual Ticket, and/or Point of Sale tickets.

Figure 19-67: Manual Ticket Report

Ticket Report								
Leslie's Flowers and Gifts								
Sale Type: Order Entry, Manual Ticket, POS								
Sort By: Customer								
04/05/2002 - 04/05/2002								
Ticket Type	Customer	Account #	Reference	Sale Date	Total			
Trans No.	Product Code	Quantity	Description	Occasion	Amount	Discount	Sales Tax1	Extension
Leslie's Flowers and Gifts								
Order Entry	Kara Ahem		AhemKa	Birthday				04/05/2002 37.45
000368/1	AR-1	1	Fresh Flower Arr.		35.10	0.00		35.10
000368/1	IL	1	IL Sales Tax				2.45	2.45
Order Entry	John Carrey		CarreJo	Other				04/05/2002 72.89
000369/1	DF-1	1	Dried Flower Arr.		65.10	0.00		65.10
000369/1	IL	1	IL Sales Tax				4.55	4.69
000369/1	BA-1	1	Balloons		3.00	0.00		3.00
POS	Adam Fitzgerald		FitzgAd	WIness				04/05/2002 44.94
000372/1	FTD-11	1	BHM Big Hug Mug		30.00	0.00		30.00
000372/1	IL	1	IL Sales Tax				2.94	2.94
000372/1	GI-1	1	Gifts		12.00	0.00		12.00
Manual Ticket	Jeanne Laidley		LaidleJ	Other				04/05/2002 53.50
000373/1	GP-1	1	Green Plant		50.00	0.00		50.00
000373/1	IL	1	IL Sales Tax				3.50	3.50
Store Ticket Summary		Count			Amount	Discount	Sales Tax1	Totals
Manual Ticket		1			50.00	0.00	3.50	53.50
Order Entry		2			100.00	0.00	7.00	107.00
POS		1			42.00	0.00	2.94	44.94
Total		4			192.00	0.00	13.44	205.44

Generating a Ticket Report

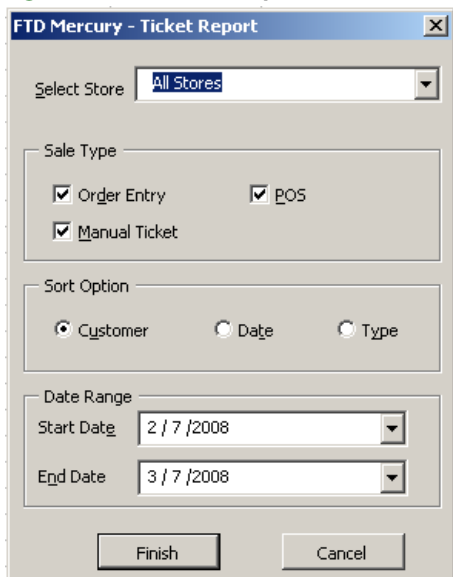
TASK To generate a Ticket report:

- 1 On the FTD Mercury Main Menu, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Ticket Report** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 In the **Select Store** field, click the arrow and select the store's data that you want to use for the report.
- 6 In the **Sale Type** section, select the types of tickets that you want to include in your report: **Order Entry, POS, and/or Manual Ticket**.
- 7 In the **Sort Option** section, decide if you want to sort the report by **Customer, Date, or Type**.
- 8 In the **Date Range** section, select a sales start and end date for the data that you want to include in the report.
- 9 Click **Finish**. The report generates and opens in Excel.
- 10 To print your report from Excel, on the **File** menu, click **Print**.
- 11 If you want to save the report from Excel, on the **File** menu, click **Save**.

Ticket Report Window

The **Ticket Report** window allows you to configure settings for the Ticket report. When you have finished configuring settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-68: Ticket Report Window



The Ticket Report window contains the following settings.

Table 19-30: Ticket Report Window Settings

Setting	Description
Select Store	Select the store for which you want to generate the report. If you have multiple stores, you can select All Stores to generate a report that includes data from all of your stores.
Sale Type	Select the type of tickets to include in the report. You can select Order Entry, Manual, and POS.
Sort Option	Select to sort the report by customer, date, or type of sale.
Date Range	Select the sales start and end dates for the report.

Wire Reconciliation Report

The **Wire Reconciliation** report lists disputed, reconciled and/or not-reconciled orders for a specified delivery date or date range. You may choose to pull your data from the Combined Report or from the **Message Log** within FTD Mercury.

NOTE The following message types are excluded from the report: Error, EFOS Rejected, Pending, Rejected, Cancel, and Confirmation.

Figure 19-69: Wire Reconciliation Report

Type	Shop Code	Mercury #	Recipient	Delivery Date	Dollar Amount	Reconciled Status
FTD OUT	90-5893AF	O6703B-8746	Frank Cameron	7/20/2005	49.99	Reconciled
FTD OUT	90-5893AF	O6644F-9797	Jenny Markus	7/20/2005	62.98	Disputed
FTD OUT	90-5893AF	O7852X-9798	Jamie Jones	7/20/2005	73.98	Reconciled
FTD OUT	90-5893AF	O3892R-9230	Carrie Smith	7/20/2005	50.00	Reconciled
FTD IN	90-0154AA	P8392N-3892	Frances Gable	7/20/2005	129.99	Reconciled
FTD IN	90-8903AA	P8478K-3891	Mr. Dorian Moros	7/20/2005	59.99	Reconciled
FTD IN	90-7834AB	P4901L-9039	Francesca Milo	7/20/2005	49.99	Reconciled
FTD IN	90-5691AA	Q0927J-0667	Candida Rodriquez	7/20/2005	99.99	Reconciled
FTD IN	90-8201AA	P4890V-9875	Penny Smith	7/20/2005	89.99	Reconciled
				Totals:		
				8	Reconciled:	603.92
				1	Disputed:	62.98
				0	Not-Reconciled:	0.00

	Number of Orders	Total Amount	Sender Rate	Sender Commission	Wire Service Rate	Wire Service Commission
Total Reconciled Incoming						
under 30.00	0	0.00	10.00%	0.00	7.00%	0.00
30.01 - 99999.99	5	429.95	20.00%	85.99	7.00%	30.10
Total	5	429.95		85.99		30.10
Total Reconciled Outgoing						
under 30.00	0	0.00	10.00%	0.00		
30.01 - 99999.99	3	173.97	20.00%	34.79		
Total	3	173.97		34.79		

Amount Received on Incoming	313.86
Amount Paid on Outgoing	139.18
Amount Due from FTD	174.68

Generating the Wire Reconciliation Report

TASK To generate the Wire Reconciliation report:

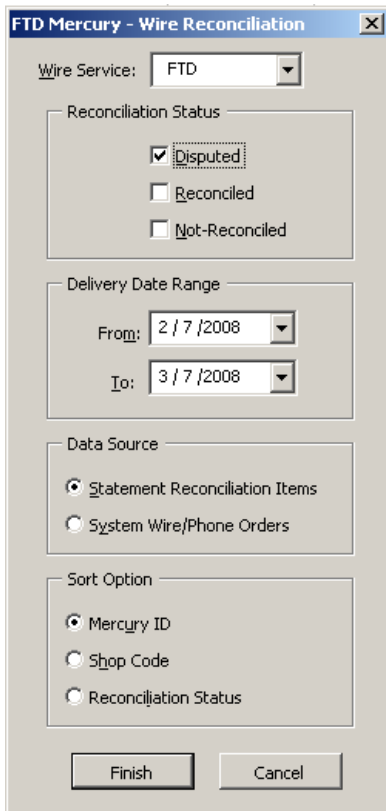
- 1 On the FTD Mercury Main Menu, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Wire Reconciliation** icon to open the template.
- 4 If a window opens asking whether you wish to enable or disable macros, click **Enable Macros**.
- 5 When the **Wire Reconciliation** window opens:
 - a. In the **Wire Service** field, click the arrow to display a list of wire services. Highlight and select the wire service for which you want to generate this report.
 - b. In the **Reconciliation Status** section, click in any combination of the **Disputed**, **Reconciled**, and **Not-Reconciled** check boxes so check marks appear to indicate which statuses you wish to include in this report.
 - c. In the **From** field of the **Delivery Date Range** area, click the arrow to display a calendar. Use your mouse to click on the date from which you want to list orders.
 - d. In the **To** field, click the arrow to display a calendar. Use your mouse to click on the date that your system will end listing orders.
 - e. In the **Data Source** section, choose to pull your reconciliation data either from the **Statement Reconciliation Items** (data from the Combined Report) or your **System Wire/Phone Orders** (data from your Message Log).
 - f. In the **Sort Option** section, select whether you want to sort the report by **Mercury ID**, **Shop Code**, or **Reconciliation Status**.

- g. Click **Finish**. The report generates and opens in Excel.
- 6 To print your report from Excel, on the **File** menu, click **Print**.
- 7 If you want to save the report from Excel, on the **File** menu, click **Save**.

Wire Reconciliation Window

The **Wire Reconciliation** window allows you to configure settings for the Wire Reconciliation Report. When you have finished configuring your settings, click **Finish** to generate the report and open it in Microsoft Excel.

Figure 19-70: Wire Reconciliation Window



The Wire Reconciliation window contains the following settings.

Table 19-31: Wire Reconciliation Window Settings

Setting	Description
Wire Service	Select the wire service for which you are generating this report.
Reconciliation Status	Select the status(es) you want to include in the report. You can select Disputed, Reconciled, and/or Not-Reconciled.
Delivery Date Range	Select the start and end delivery dates for the report.
Data Source	Select whether you want the data source to be statement reconciliation items or system wire/phone orders.
Sort Option	Select whether you want the report sorted by Mercury ID, shop code, or reconciliations status.

Wire Service Incoming/Outgoing Report

The **Wire Service Incoming/Outgoing** report prints all incoming and outgoing orders by wire service for the given date range. If you have multiple stores, you can select to print a specific store, or you can print all locations in one report. Printing all locations will print a grand totals section at the bottom of the report.

- » The **Detail Report** lists the shop code, recipient name, delivery date, and amount for each incoming and outgoing order. Listed are incoming totals, outgoing totals, a grand incoming and outgoing total, and a grand total for all orders.
- » The **Summary Report** lists the total dollar amount for incoming and outgoing orders. A grand total for incoming, outgoing, and all orders are listed.

Figure 19-71: Wire Service Incoming/Outgoing Report - Detail

Wire Service Incoming-Outgoing				
Wire Type: FTD				
04/08/2002 - 04/08/2002				
Detail - John's Flowers				
Sort by: Message Date				
Shop Code	Recipient	Delivery Date	Amount	
FTD - John's Flowers				
Incoming				
90-8907AA	Lisa Jones	04/08/2002	45.98	
90-0978AA	Kari Smith	04/09/2002	68.55	
90-4453AA	Frank Johnson	04/09/2002	92.45	
90-3951AA	Brigit Kaley	04/09/2002	40.90	
90-7630AA	Cindy Scanlon	04/11/2002	52.20	
90-2238AB	Cathy Kosnoff	04/10/2002	95.99	
90-0909AA	Gary Sbragia	04/08/2002	71.56	
90-6723AA	Laura Jameson	04/08/2002	88.88	
90-9821AA	Steve Rizzio	04/09/2002	39.50	
90-2679AA	Mike Bush	04/09/2002	48.48	
90-0741AC	Rose Gebhardt	04/12/2002	66.19	
90-5020AC	John Prindaville	04/08/2002	57.44	
90-0001AA	Sara Boysen	04/09/2002	129.90	
90-0134AA	Rob Bosko	04/14/2002	101.56	
90-9528AA	Mary Muthart	04/08/2002	38.85	
90-5632AA	Diane Brown	04/10/2002	72.50	
90-6700AA	Kevin Fennewald	04/08/2002	99.96	
Incoming Total			1,210.80	
Outgoing				
90-2232AC	Frankie Biggs	04/11/2002	75.95	
90-7782AA	Carrie Shaugnessy	04/10/2002	90.50	
90-6912AC	Helen O'Malley	04/08/2002	67.85	
90-7903AQ	Liz Markley	04/08/2002	54.89	
90-7739AA	Myra Smith	04/09/2002	77.26	
90-7719AA	Jennifer Stockwell	04/09/2002	84.99	
90-8910AA	Corey Hardt	04/12/2002	54.47	
90-8201AA	Tom Leider	04/08/2002	92.45	
90-7012AA	Seamus Daley	04/09/2002	40.30	
Outgoing Total			638.66	
Total:			1,849.46	
Grand Incoming Total:			1,210.80	
Grand Outgoing Total:			638.66	
Grand Total:			1,849.46	

Figure 19-72: Wire Service Incoming/Outgoing Report - Summary

Wire Service Incoming-Outgoing	
Wire Type: FTD	
04/08/2002 - 04/08/2002	
Summary	
	Amount
FTD	
Incoming	1,210.80
Outgoing	638.66
Total:	1,849.46
Grand Incoming Total:	1,210.80
Grand Outgoing Total:	638.66
Grand Total:	1,849.46

Generating the Wire Service Incoming/Outgoing Report

TASK To generate the Wire Service Incoming/Outgoing report:

- 1 On the **FTD Mercury Main Menu**, click **Business Reports**.
- 2 Double-click **Mercury Forms**.
- 3 Double-click on the **Wire Service Incoming Outgoing** icon to open the template.
- 4 If a window opens asking if you wish to enable macros, click **Enable Macros**.
- 5 If you have multiple stores, select the store in the **Select Store** field.
- 6 In the **Wire Type** section, select the wire service(s) that you want to include in the report. The **DOV** wire service is for incoming Teleflora orders, if you have the Wire Service Interface.
- 7 In the **Date Range** section, select the start and end sale dates for the data that you want to include in the report.
- 8 In the **Report Type** section, select if you want to print the **Detail Report** or the **Summary Report**.
- 9 Select how you want to sort the report: by **Date**, **Name** (recipient name), or **Amount**.
- 10 Click **Finish**. The report generates and opens in Excel.
- 11 To print your report from Excel, on the **File** menu, click **Print**.
- 12 If you want to save the report from Excel, on the **File** menu, click **Save**.

Wire Service Incoming/Outgoing Window

The **Wire Service Incoming/Outgoing** window allows you to configure settings for the Wire Service Incoming/Outgoing report. When you have finished configuring settings, click **Finish** to generate the report. It will open in Microsoft Excel.

Figure 19-73: Wire Service Incoming/Outgoing Window

The Wire Service Incoming/Outgoing window contains the following settings.

Table 19-32: Wire Service Incoming/Outgoing Window Settings

Setting	Description
Select Store	Select the store for which you are generating this report. If you are configured as a multi-store shop, you can also select All Stores.
Wire Type	Select the wire type(s) you want to include in this report. You can select from FTD, VNS, TEL, or DOV.
Start Date	Enter the starting date for the report.
End Date	Enter the ending date for the report.
Report Type	Select whether you want to generate a Detail or Summary report.
Sort Option	You can select whether you want to sort the report by Message Date, Amount, or Name.

Accounting Application and QuickBooks Integration

FTD has teamed up with Intuit to create a custom General Ledger solution using QuickBooks. FTD Mercury steps you through the process of creating a General Ledger Chart of Accounts and exporting your FTD Mercury data to QuickBooks. These features are available with the Accounting module.

To purchase the Accounting module, please contact Mercury Technology Sales at 1-800-767-3222. You will be shipped the QuickBooks software, and the Accounting module will be activated on your system. If you are using the legacy GL Export feature with Peachtree, you can continue to use that feature, or you can purchase the upgrade to the Accounting module with QuickBooks.

IMPORTANT FTD instructs you how to set up your Chart of Accounts and export your FTD Mercury data to QuickBooks. We also provide you with basic QuickBooks “How To’s” (see [Using QuickBooks](#) on page 20–24). FTD cannot teach you accounting; you must consult your accountant to help you with accounting.

If you need assistance using the QuickBooks software, please refer to the QuickBooks online help (located under the Help menu). Because accounting practices are unique per shop, FTD strongly recommends you consult your accountant before installing, setting up, and using QuickBooks.

FTD offers a training course that covers the Accounting module and its integration to QuickBooks. FTD does **not** offer QuickBooks training (for more information on QuickBooks training options, please refer to the Intuit Web site at www.intuit.com). For more information on the training courses available at FTD, call 1-800-669-1000, extension 6855.

IMPORTANT If, at any point, you need to upgrade to a new version of QuickBooks, you must uninstall the older version before installing the new version.

Accounting Module Main Menu

TASK To access the Accounting module Main Menu:

On the **FTD Mercury Main Menu**, click **Accounting**. The **Accounting Module** opens, with the **Accounting Module Main Menu** displayed.

IMPORTANT All Accounting functions must be performed on the FTD Mercury server. You cannot access the Accounting module from a client computer (even by using Remote Desktop).

Following are the options in the **Accounting Module Main Menu**:

Table 20-1: Accounting Module Main Menu Options

Option	Description
Chart of Accounts	Use this option to set up your QuickBooks Chart of Accounts. See Step 4: Set Up Your Chart of Accounts on page 20-6.
Balance	Use this option to export your FTD Mercury data to QuickBooks, or just view/print your sales information for the given date range (you do not need to purchase the Accounting module to print/view the information, only to export). See The Balance Wizard (Exporting to QuickBooks) on page 20-15.
GL Export History	Use this option to view or print previous exports. See General Ledger Export History on page 20-23.

If You Are Already Using QuickBooks

NOTE

This section addresses issues that only concern those who have already been using QuickBooks for accounting. If you are new to QuickBooks, skip to [Setting Up QuickBooks](#) on page 20-4.

If you have been using QuickBooks for your accounting needs, you are already familiar with the program. However because you are now using the Accounting module within FTD Mercury, you must follow special configurations and guidelines to ensure that your accounting process runs smoothly.

- » If you have been using the legacy GL Export function within FTD Mercury, you no longer use the options in the FTD Mercury **Management** menu to export transactions and view export history (they were disabled after you upgrade to the Accounting module). Now you will export and view export history from the Accounting module in FTD Mercury. To access the Accounting module, click **Accounting** on the FTD Mercury Main Menu (see [Accounting Module Main Menu](#) on page 20-1).
- » Even if you already have a company set up in QuickBooks, you must set up a NEW company. You cannot use any previously created companies that you used on your own, or with the legacy FTD Mercury GL Export feature. Any manually entered transactions will need to be re-created within your new QuickBooks company including Accounts Payable, Payroll, or any entries created in QuickBooks.
You can enter the opening balances from the old company into the accounts for the new company once the new chart of accounts has been created. This is advised by both Intuit and FTD. See [Step 6: Enter Your Opening Balances](#) on page 20-14 for more information.
- » If you have lists already created in QuickBooks (for example, customer, vendor, or employee lists), you can import these lists into your new QuickBooks company file. See [Exporting and Importing Lists from Previous QuickBooks Companies](#) on page 20-3.
- » Within the Accounting module, you will follow a setup wizard when you create your new chart of accounts. This setup wizard will generate General Ledger account numbers for you. If you have been using the legacy GL Export feature in FTD Mercury or your own QuickBooks company, you can change these account numbers to match your existing General Ledger account numbers (you will be instructed how and when to do this). Therefore it is important that you have a current copy of your old chart of accounts handy when going through the wizard for the first time.

- » When you upgrade to the Accounting module, product codes are no longer tied to a General Ledger account number. The GL Account Number field has been removed from the product window. Instead, product sales are exported to QuickBooks by product category. Therefore you will want to make sure that your product categories are set up the way you want them in Mercury Administration, and that all of your product codes are assigned the correct category.

IMPORTANT If you, at any point, need to upgrade to a new version of QuickBooks, you must uninstall the older version before installing the new version.

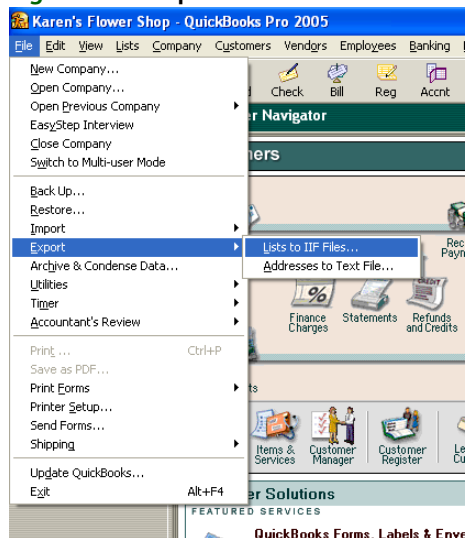
Exporting and Importing Lists from Previous QuickBooks Companies

NOTE You can import lists only after you have run through the FTD Mercury Chart of Accounts Wizard and created your QuickBooks company file. Complete the configurations in [Setting Up QuickBooks](#) on page 20-4 before importing lists.

If you are already using QuickBooks and you have lists created in your QuickBooks company file (for example, customer, vendor, or employee lists), you can import these lists into the new QuickBooks company file that you will be using with FTD Mercury. First you will open your existing QuickBooks company file and export the lists to a file on your computer. Then you will open your new QuickBooks company file and import the file.

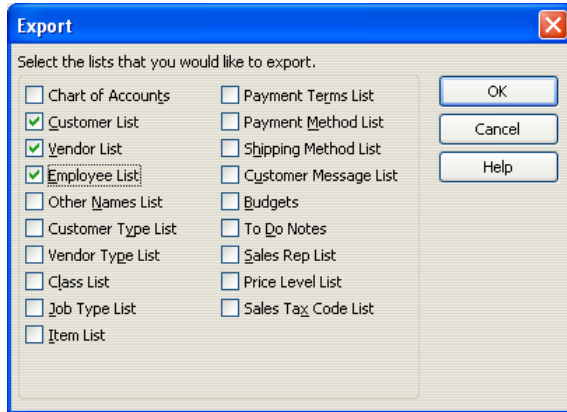
- 1 Open your QuickBooks company file that contains the lists you want to export to your new company file.
- 2 From the QuickBooks menu bar, click File, highlight Export, then click Lists to IIF Files.

Figure 20-1: Export IIF Files



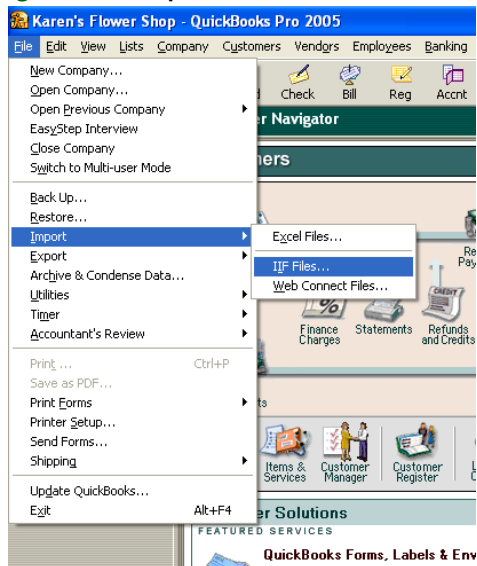
- 3 Select the lists you want to export, and then click OK. To select a list, click on the check box so that a check mark appears:

Figure 20-2: Select Lists



- 4 Next you are prompted for a location to save the .IIF file. Name the file, select a location, and then click **Save**. You receive the message Your data has been exported successfully. Remember where you saved the file because next you will have to import the file into your new QuickBooks company file.
- 5 Close the QuickBooks company file.
- 6 Open your new QuickBooks company file (where you want to import the lists). The default location for this file is in C: \Wi ngs\Qui ckBooks\US if you are a US shop, or C: \Wi ngs\Qui ckBooks\Canada if you are a Canadian shop.
- 7 From QuickBooks menu bar select **File**, highlight **Import**, and then click **IIF Files**.

Figure 20-3: Import IIF Files



- 8 Navigate to the location where you saved your IIF (lists) file. Select the file and then click **Open**. You receive the message Your data has been imported.

Setting Up QuickBooks

Some things to consider before beginning:

- » Because QuickBooks must be installed on the FTD Mercury Server, you must think about how and where you will be doing your bookkeeping.

- » If you have one shop, you will create one company in QuickBooks for your one location. If you have multiple shops, you can either set them up under one QuickBooks company, or you can create multiple QuickBooks companies. The option that you choose depends on how you run your business (for example, do you have one bank account for all locations, or do you keep the accounting separate?). Again, we recommend that you turn to your accountant first for advice on setting up QuickBooks before calling FTD.
- » Your QuickBooks company file is backed up every night during your FTD Mercury nightly backup.

Step 1: Confirm the License Key is Valid

After you purchase the FTD Mercury Accounting module, the Mercury Technology Assistance Center sends you a General message that enables the features on your system. Before you begin setting up QuickBooks, make sure that the General message has turned on the features for you.

To check that the module has been enabled, in Mercury Administration go to the License option and make sure that Accounting Module Name reads Valid. For more information on accessing and using Mercury Administration, see your FTD Mercury Reference Guide.

If the Accounting Module Name reads Deactivated, call the Mercury Technology Assistance Center at 1-888-309-2244 and a support representative will activate the module for you.

Step 2: Install QuickBooks (New Customers Only—Existing Customers Skip to Step 3)

IMPORTANT If you are an existing QuickBooks customer, skip this step and proceed to [Step 3: Open QuickBooks and Activate the Software](#).

The second step is to install QuickBooks Pro 2005 or 2006 on your FTD Mercury Server PC. If you already have QuickBooks Pro 2005 or 2006 installed on another computer, you must locate the installation CD and re-install it on your FTD Mercury Server (the integration to FTD Mercury will not work if you don't).

IMPORTANT If, at any point, you need to upgrade to a new version of QuickBooks, you must uninstall the older version before installing the new version.

TASK **To install QuickBooks:**

- 1 Shut down all running programs, including virus protection programs.
- 2 Insert the QuickBooks CD into your computer's CD drive. The installation begins automatically.
- 3 Follow the prompts to install the software.

If you have any questions regarding the installation, refer to the QuickBooks Startup Guide that came with your QuickBooks software.

Step 3: Open QuickBooks and Activate the Software

Next you must open QuickBooks and activate the software. You will need the QuickBooks license key that came with your QuickBooks materials.

This step is required before you can set up your Chart of Accounts. If you do not complete this step, FTD Mercury will not be able to set up your Chart of Accounts in QuickBooks.

TASK To open QuickBooks and activate the software:

- 1 Double-click the **QuickBooks Pro** icon on your FTD Mercury server desktop to start the software.
- 2 On the **Help** menu, click **Register QuickBooks**.
- 3 Follow the prompts to register the software.

Step 4: Set Up Your Chart of Accounts

The next step is to set up your Chart of Accounts in the Chart of Accounts Wizard.

IMPORTANT FTD strongly recommends that you speak with your accountant before setting up your Chart of Accounts.

You will need the following information:

- » If you used QuickBooks before upgrading to Accounting, or if you used the legacy GL Export feature (General Ledger Export) in FTD Mercury, make sure you have a printed copy of your old chart of accounts. You will want to refer to this list to make sure all of the accounts you need are created in the Chart of Accounts Wizard. You may also want to assign the same account numbers to the accounts.
- » If you have multiple stores, you must know if you will be creating one QuickBooks company for all stores, or multiple QuickBooks companies.
- » Your main bank account name. The main bank account is used for cash sales, house accounts paid by cash or check, paid-outs/paid-ins, and cash over/short.
- » Any additional bank accounts, for example for payroll or credit cards.
- » Your credit card accounts, and the account to which they will be deposited.
- » You must decide whether each of your paid in or paid out types is related to Cost of Goods Sold or Operating Expenses.
- » If you plan on adding paid in/out types or product categories in Mercury Administration, please do so before beginning the Chart of Accounts Wizard. Otherwise you will have to create QuickBooks accounts for these items later. (See [Adding Accounts to the Chart of Accounts](#) on page 20–25 for more information.)
- » All product sales are exported to QuickBooks by product category (Fresh Flowers, Cards, Containers, etc.), NOT by General Ledger account number. By default, all products in your FTD Selection Guide (florist directory) have the default product category of Other. Therefore when exporting data to QuickBooks, dollar amounts for those products are imported into the “Other” income account. If you do not want the dollar amounts going to the “Other” income account, you will have to change the product category for each of the Selection Guide products so that they are imported into different income accounts.

If you decide to change the product categories of the Selection Guide products, note that when you update your florist directory you will also have to change the product categories of any products that were added during the upgrade.

The Chart of Accounts Wizard

The Chart of Accounts Wizard steps you through the process of creating a QuickBooks Chart of Accounts. If you have multiple locations and are setting up multiple companies in QuickBooks, you must step through this procedure for each company. You begin by telling QuickBooks which store(s) are associated with the company you are setting up. One QuickBooks company can contain several stores, however you cannot associate a store with more than one QuickBooks company.

Setting Up Your Chart of Accounts

You navigate through the Chart of Accounts Wizard by clicking the **Next** button. Note that if you click the **Back** button, you will lose the information that you entered in the current screen.

TASK To set up your chart of accounts:

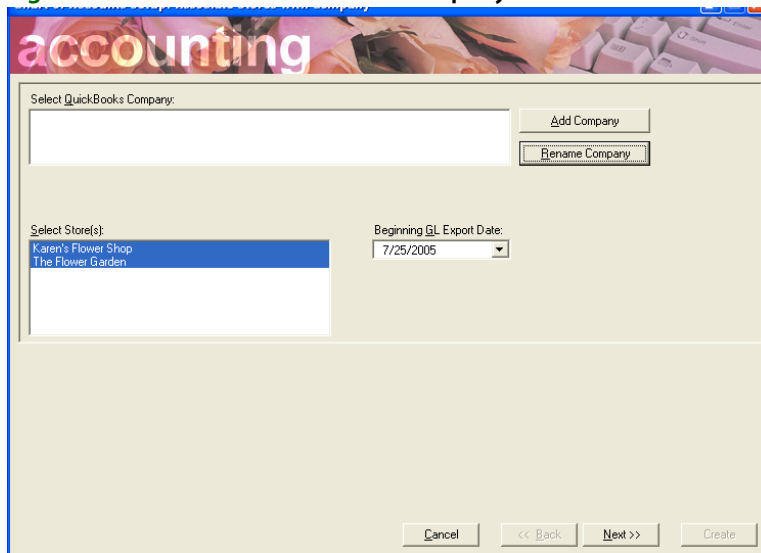
- 1 On the **FTD Mercury Main Menu**, click **Accounting**.
- 2 Click the **Chart of Accounts** button.

NOTE

If you receive the message “ALERT: QuickBooks must be installed prior to proceeding,” this means that you have not yet installed QuickBooks on the FTD Mercury Server. Locate your QuickBooks installation CD and see [Step 2: Install QuickBooks \(New Customers Only—Existing Customers Skip to Step 3\)](#) on page 20–5.

The following window displays after you click the Chart of Accounts button:

Figure 20-4: Associate Stores with Company



Now you will add your QuickBooks company file and tell QuickBooks which of your stores are associated with this company file. You must create a **NEW** company the first time you run through the wizard.

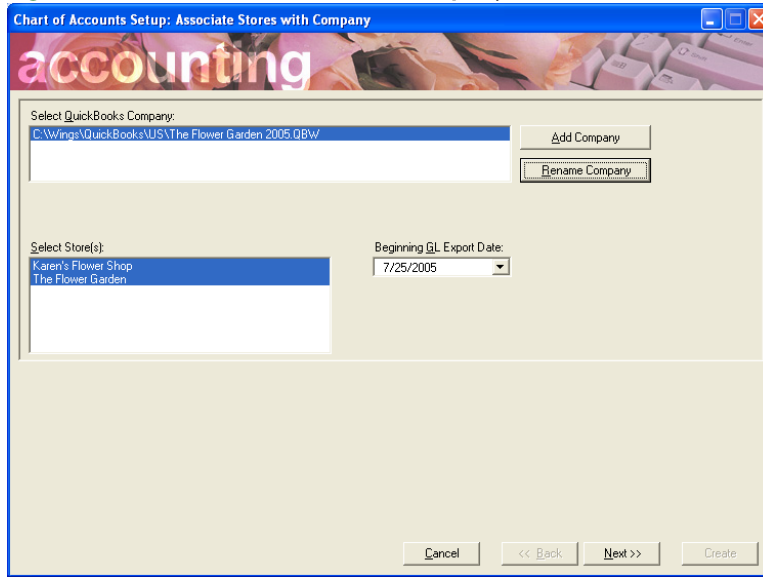
- 3 Click **Add Company**.

Figure 20-5: Add Company



- 4 Type the name of your company (FTD Mercury creates a QuickBooks company file with this name) and then select if the company is located in the **U.S.** or **Canada**. Then click **OK**. You are returned to the Accounting module with your QuickBooks company file selected.

Figure 20-6: Associate Stores with Company (2)



- 5 Complete the remainder of this window:
 - » **Beginning GL Export Date:** By default, this field displays the sale date of the first unexported transaction in your system. If you are using the Chart of Accounts Wizard for the first time, this date may be the date that you first started using FTD Mercury. (If you were using the legacy GL Export feature, all transactions were marked as unexported transactions when you upgraded to the Accounting module. Therefore the transactions that you exported using the legacy GL Export feature are available for re-export.) Change this date to the date that you want to begin tracking sales data for your new QuickBooks company.
Note that data can only be exported once. Even if you manually change the date to an earlier date, only transactions that have not already exported will be included in the export.
 - » In the **Select Store(s)** box, highlight the store(s) that are associated with this QuickBooks company. If you select a store that is already associated with a QuickBooks company file, you will be prompted if you want to change the store's company.
- 6 Click **Next** to set up your bank accounts.

Figure 20-7: Create Bank Accounts

Chart of Accounts Setup: Create Bank Accounts

QuickBooks Company (qbw file):
C:\Wings\QuickBooks\US\Margie's Flowers Shop.QB'W

Selected Store(s):
Margie's Flowers
Branch Store

Store	Main Bank Account Name
Margie's Flowers	Harris Bank
Branch Store	Harris Bank 2

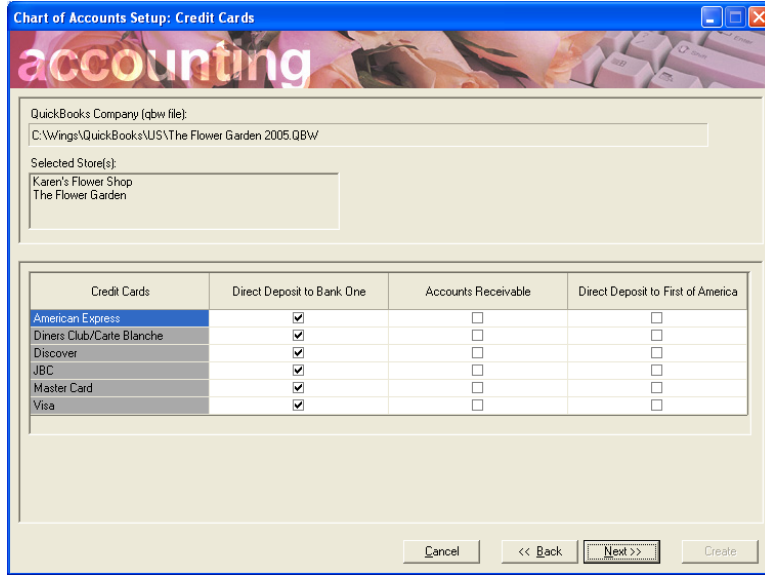
Additional Bank Account(s) Name:

Main Bank Account is used for Cash Sales and/or House Accounts Paid by Cash or Check.

Cancel << Back Next >> Create

- » **Main Bank Name:** For the given store, this is the name of the bank that you use for cash sales, house accounts paid by cash or check, paid outs/paid ins and cash over/short. You can name this the name of the bank, or if you have multiple accounts at the bank, you can name this account "Bank One – Cash Sales" for example. It is required to specify a main bank account name for each store. Type the name of the bank and then click Apply.
 - » **Additional Bank Account Names:** If you have other bank accounts, add them in this field. For example, you may have accounts at other banks or you may have a separate account for credit cards. This field is optional.
 To add a bank account name, type the name of the account in the small text field and then click **Add** so the account displays in the large text field below.
- 7 Click **Next** to set up your credit cards.

Figure 20-8: Set Up Credit Cards

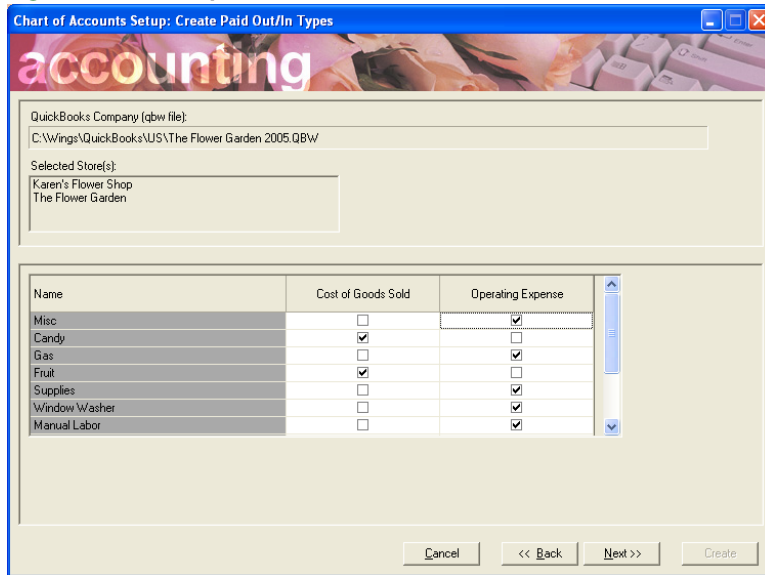


Here you must define where your credit card revenue should be deposited. You have the option to select the Accounts Receivable account, or any of the bank accounts that you set up in the previous screen.

By default, all credit cards are set to be deposited to your main bank account. To change which account a credit card company's revenue should be deposited, click in the check box for the appropriate bank. You can only select one bank for each credit card company.

- 8 Click **Next** to set up your paid out/paid in accounts.

Figure 20-9: Set Up Paid In/Paid Out Accounts



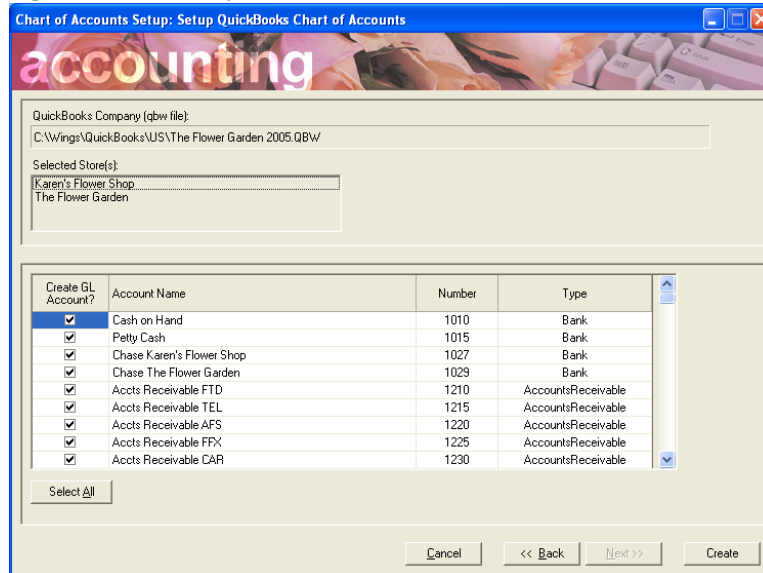
Here you must specify whether each paid out/in type is related to Costs of Goods Sold or Operating Expenses. For example, if you have a paid out type of "Candy" that you use to purchase Candy for your gourmet baskets, this account should be designated as a Cost of Goods Sold account. If you have a Paid Out type of "Supplies" to purchase office supplies, this account should be designated as an Operating Expense account.

To designate a paid out/in type as a Cost of Goods Sold or Operating Expense account, click in the appropriate check box for that paid out/in type. Only one category can be assigned per paid out/in type.

For paid out/in types that are defined as Cost of Goods Sold, a Cost of Goods Sold purchase account is created in the Chart of Accounts. The account is created with the name of the paid out/in type followed by the word “Costs” (for example “Candy Costs”). For paid out/in types that are defined as Operating Expense accounts, an Operating Expense account is created with the name of the paid out/in type followed by the word “Expense” (for example “Supplies Expense”).

- 9 Click **Next** to set up your Chart of Accounts.

Figure 20-10: Set Up Chart of Accounts



On this screen you decide which accounts will make up your Chart of Accounts in QuickBooks. The accounts that are listed here are based on the responses that you provided in the Chart of Accounts Wizard, along with setups that you have on FTD Mercury, such as product categories and fees. Other accounts are also listed, such as accounts for vehicle and furniture costs.

At this time you should scroll through the list of accounts and decide which accounts you want to add to your Chart of Accounts. By default, only the required accounts are selected. If you want to create an account for a listed item, make sure a check mark exists for that item in the Create GL Account? column. To omit an account from your Chart of Accounts, clear the check mark that appears in the Create GL Account? column. To select all accounts, click the Select All button.

Some accounts are required, such as your bank accounts and the accounts for your paid in/out types. If you attempt to remove the check mark in the Create GL Account? column for a required account, you receive the message Cannot uncheck. Account is required by your FTD Mercury system.

In addition to reviewing the accounts you want to include, you can also change the account number of the accounts (you may want to do this to match a previous QuickBooks Chart of Accounts). To change the account number, click inside of the account number cell so that a cursor appears, then type the new number. Note that you can change the account number on the first export only. You cannot change account names later in QuickBooks or in the Chart of Accounts wizard. To change account numbers later, you must do so in QuickBooks. (Since FTD Mercury and QuickBooks identify GL accounts by account name, there is no need to re-run the Chart of Accounts Wizard if you change account numbers in QuickBooks.)

- 10 When you are finished, click **Create**. The accounts are then created in QuickBooks.

- 11 Click **OK** when you receive the following confirmation message FTD Mercury and QuickBooks have been updated successfully. ### new account(s) were added to Quickbooks. (### is replaced by the number of accounts added).

About Your Chart of Accounts

Keep the following in mind about your Chart of Accounts:

- » A sale and purchase account are created for each product category. The sale account is named the product category preceded by the word "Sales" and the purchase account is named the product category followed by the word "Costs." For example, the sales account for the Fresh Flowers product category is named "Sales Fresh Flowers" and the purchase account is named "Fresh Flowers Costs."
- » Accounts are created for all products with the "Fee" product category. These accounts are sub accounts of the Fee category in QuickBooks.
- » Payable and Receivable accounts are created for each wire service.
- » When Store Transfers are enabled, the Chart of Accounts contains accounts for Sales Accepted for Transfer, Sales Transferred, Inner Company Transfers, and Transferred Sales Commission.

Journal Entries for Outgoing Wire Orders

The "Sales Outgoing Wire Orders" and "Paid to Outgoing Florist" accounts are accounts that handle outgoing wire orders. All outgoing orders use the format of the following example when generating journal entries in QuickBooks:

Product = \$50

Delivery Charge = \$10

Relay Charge = \$5

Sales Tax = \$6

Total Cash Sale = \$71

Table 20-2: Journal Entries for Outgoing Wire Orders

General Ledger Account	DEBIT	CREDIT	Description
Main Bank Account	71.00		Total order amount
Sales Outgoing Wire Orders		60.00	100% product and delivery
Paid to Outgoing Florist	48.00		100% product and delivery less 20% sender commission
Accounts Payable FTD		48	100% product and delivery less 20% sender commission
Relay Charge Income		5.00	100% relay fee product
Sales Tax Payable		6.00	100% Sales Tax Collect

Journal Entries for Store Transfers

For Store Transfers, entries are made to the General Ledger Accounts of each store. For example, suppose Margie's Flowers transferred a \$115.00 order (\$90.00 product, \$10.00 delivery, \$10.00 service fee, 5.00 tax) to Jay's Flowers and received the same order transferred order from Jay's Flowers. The GL Export report for Margie's Flowers would contain the journal entries shown in the

table below. Margie's Flowers and Jay's Flowers are set up in Mercury Administration to provide an 80/20 split on revenues to stores when transferring local orders.

Table 20-3: Journal Entries for Store Transfers

General Ledger Account	Debit	Credit	Description
Sales Accepted for Transfer		100.00	100% of the total product and delivery charge
Sales Tax and all non-product and non-delivery categories		15.00	100% to the appropriate account
Payments	100.00		100% to the appropriate account
Sales Transferred	80.00		Percentage of total product plus delivery times the percentage of revenue shared with the store to which the order was transferred, based on the Filling percentages in Mercury Administration
Sales Income		90.00	100% of the product to the appropriate income account
Delivery Income		10.00	100% of the ticket's delivery charge to delivery income account
Transferred Sales Commission	20.00		Percentage of total product plus delivery times the percentage of commission shared with the store from which the order was transferred, based on the Selling Commission percentage in Mercury Administration
Inner Company Transfers	80.00		Product and delivery income less commissions paid on transferred sales. The combined total of journal entries for inner company transfers for all stores will be 0.

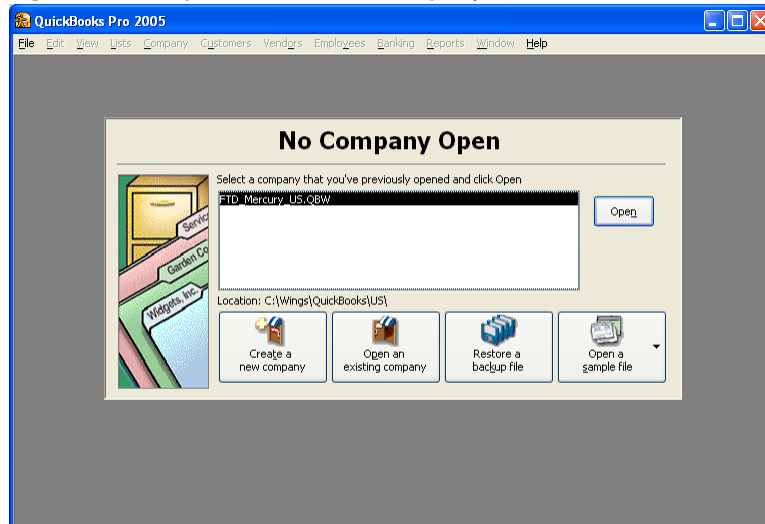
Step 5: Enter Your Company Information in QuickBooks

Next you must open QuickBooks and type in your company information (shop name, address, tax ID, etc.) so that the information is correct on reports and tax forms.

TASK To enter your company information:

- 1 Double-click the **QuickBooks Pro** icon on your Windows desktop to open the program. The following window appears.

Figure 20-11: Open QuickBooks Company File



- 2 Highlight your QuickBooks company file and then click **Open**.
- 3 You are prompted for a password. Type `admin` (in lowercase letters). Bullets appear to protect your password.

Figure 20-12: QuickBooks Login



- 4 Click **OK**.
- 5 Click the **Company** menu in the menu bar, and then click **Company Information**. Update the information in this screen and then click **OK**.

See [Changing Company Information](#) on page 20–24 for more information.

Step 6: Enter Your Opening Balances

Next you may want to enter the opening balance for each of your QuickBooks accounts. If you are not ready to enter your opening balances, you can do this at a later time.

To obtain your opening balances, ask your accountant to provide you with a Trial Balance for your start/transition date (the start/transition date is the date that you are moving from your old bookkeeping method [or old QuickBooks company file] to your new QuickBooks company file with FTD Mercury). If a Trial Balance is not available, use a year-to-date financial statement as of your

start/transition date. To help you calculate your opening balances, you will also need a bank statement for accounts that receive one (so that you can see which checks have cleared and record service charges and interest), as well as a list of your outstanding checks and deposits. Using these tools, work with your accountant to determine the opening balance for each of your accounts, and then enter them in QuickBooks. Refer to the QuickBooks online help for instructions.

The Balance Wizard (Exporting to QuickBooks)

After you have set up your QuickBooks software, Chart of Accounts, and entered opening balances for your accounts, you are ready to export your FTD Mercury data to QuickBooks. You can always view or print your sales information for the given date range before you export (you do not have to purchase the Accounting module to view or print sales information, only to export to QuickBooks).

Before you export data to QuickBooks, there are a few things that you should complete in FTD Mercury:

- » If you want your Point of Sale transactions to be included in the export, you must perform a z-out on your cash register. Otherwise transactions in the open Point of Sale session are excluded from the export.
- » If you have enabled store transfers or added any product categories or paid out/in types in Mercury Administration since creating your QuickBooks Chart of Accounts, make sure to add these accounts to your Chart of Accounts in QuickBooks before exporting (otherwise you will not be allowed to export). Do this by re-running the Chart of Accounts Wizard (see [The Chart of Accounts Wizard](#) on page 20–6).

TASK

To export to QuickBooks

- 1 On the **FTD Mercury Main Menu**, click **Accounting**.
- 2 Click the **Balance** button.

Figure 20-13: Balance Wizard – Store Selection

- 3 Complete the information on this screen:
 - » **Store Name:** This drop-down field contains all of your stores that have been associated with a company file when you set up your Chart of Accounts in the Chart of Accounts wizard. Select the store data that you are exporting to QuickBooks (you can only export one store at a time).

» **Start Date/End Date:** Specify the date range of the data you are exporting by selecting a start date and end date. By default, the start date is the date of the earliest un-exported transaction and the end date is today's date.

» **Detail or Summary:** Specify if you want to go through the Balance Wizard in Detail or in Summary.

Selecting the **Detail** option takes you through every screen of the wizard, listing cash sales, credit cards, customer receivables, wire service receivables, and gift certificates/gift cards all in detail before you reach the Summary Report.

Selecting the **Summary** option takes you directly to the Summary Report (see [Sample Balancing Summary Report \(page 1\)](#) on page 20-16), which lists a summary of the transactions that you will be exporting to QuickBooks. Skip to step 9 if you want to skip to the Summary Report.

» **Print Balance Report:** Click this button to print the Balancing Summary Report, which lists your cash sales, credit card transactions, customer receivables, wire service receivables, gift certificate transactions, and store transfers in detail. See the following example report. Note that each of these sections can be printed individually on their corresponding screens in the Balancing Wizard. You can choose to print the entire report now, or you can print only the sections you need on the following screens.

Figure 20-14: Sample Balancing Summary Report (page 1)

BALANCING SUMMARY REPORT									
MARGIE'S FLOWERS									
DATE: 2/18/2008 thru 2/18/2008									
C:\Wings\QuickBooks\US\Margie's Flowers.OBW									
	Sale Date	Z-Out Date	Order# /Units	Merch. Amount	Delivery Charges	Relay Charges	Sales Tax	Discount Amount	Total
CASH/CHECKS									
Total Cash Sales Summary									
Cash and Check Sales			0	0.00	0.00	0.00	0.00	0.00	0.00
Cash Refunds			0	0.00	0.00	0.00	0.00	0.00	0.00
Cash and Check Payments (ROA)			0	0.00	0.00	0.00	0.00	0.00	0.00
Paid Outs/Ins			0	0.00	0.00	0.00	0.00	0.00	0.00
Cash Over/Short			0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL BANK DEPOSITS			0	0.00	0.00	0.00	0.00	0.00	0.00
CREDIT/DEBIT CARDS									
CREDIT/DEBIT CARDS - BANKS									
Master Card	2/18/2008		024654/1	66.50	8.50	0.00	0.00	0.00	75.00
Credit/Debit Card Sales			1	66.50	8.50	0.00	0.00	0.00	75.00
Credit/Debit Card Payments (ROA)			0	0.00	0.00	0.00	0.00	0.00	0.00
Credit/Debit Card Refunds			0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL CREDIT/DEBIT CARD BANK			1	66.50	8.50	0.00	0.00	0.00	75.00
CREDIT/DEBIT CARDS - RECEIVABLES									
Credit/Debit Card Sales			0	0.00	0.00	0.00	0.00	0.00	0.00
Credit/Debit Card Payments (ROA)			0	0.00	0.00	0.00	0.00	0.00	0.00
Credit/Debit Card Refunds			0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL CREDIT/DEBIT CARD RECEIVABLES			0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL CREDIT/DEBIT CARD SETTLEMENT			1	66.50	8.50	0.00	0.00	0.00	75.00

Figure 20-15: Sample Balancing Summary Report (page 2)

BALANCING SUMMARY REPORT								
MARGIE'S FLOWERS								
DATE: 2/18/2008 thru 2/18/2008								
C:\Wings\QuickBooks\US\Margie's Flowers.QBW								
SUMMARY BY CREDIT/DEBIT CARD COMPANY								
American Express	0	0.00	0.00	0.00	0.00	0.00	0.00	
Diners Club/Carte Blanche	0	0.00	0.00	0.00	0.00	0.00	0.00	
Discover	0	0.00	0.00	0.00	0.00	0.00	0.00	
Debit - OE	0	0.00	0.00	0.00	0.00	0.00	0.00	
Debit - POS	0	0.00	0.00	0.00	0.00	0.00	0.00	
Master Card	1	66.50	8.50	0.00	0.00	0.00	75.00	
Visa	0	0.00	0.00	0.00	0.00	0.00	0.00	
HOUSE ACCOUNT								
Sale Date	Z-Out Date	Order# /Units	Merch. Amount	Delivery Charges	Relay Charges	Sales Tax	Discount Amount	Total
0001042	2/18/2008	024652/1	39.99	10.00	0.00	0.00	0.00	49.99
0001042	2/18/2008	024655/1	83.44	10.00	0.00	0.00	0.00	93.44
0001042	2/18/2008	024656/1	41.50	8.50	0.00	0.00	0.00	50.00
House Charge Sales		3	164.93	28.50	0.00	0.00	0.00	193.43
Manual Ticket Sales		0	0.00	0.00	0.00	0.00	0.00	0.00
Debit Sales		0	0.00	0.00	0.00	0.00	0.00	0.00
ROA Payments		0	0.00	0.00	0.00	0.00	0.00	0.00
Credit Sales		0	0.00	0.00	0.00	0.00	0.00	0.00
Write Off		0	0.00	0.00	0.00	0.00	0.00	0.00
Finance Charges		0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL CUSTOMER RECEIVABLES		3	164.93	28.50	0.00	0.00	0.00	193.43
STORE TRANSFERS								
Sale Date	Z-Out Date	Order# /Units	Merch. Amount	Delivery Charges	Relay Charges	Sales Tax	Discount Amount	Total
Value of Sales Transferred to Other Stores		0	0.00	0.00	0.00	0.00	0.00	0.00
Income Retained		0	0.00	0.00	0.00	0.00	0.00	0.00
Total Revenue Transferred		0	0.00	0.00	0.00	0.00	0.00	0.00

Figure 20-16: Sample Balancing Summary Report (page 3)

BALANCING SUMMARY REPORT
MARGIE'S FLOWERS
 DATE: 2/18/2008 thru 2/18/2008
 C:\Wings\QuickBooks\US\Margie's Flowers.QBW

Value Of Sales Transferred From Other Stores	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Commission Paid	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Revenue Received	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00

	Sale Date	Z-Out Date	Order# /Units	Merch. Amount	Delivery Charges	Relay Charges	Sales Tax	Discount Amount	Total
WIRE SERVICE									
Incoming Sales Summary									
FTD	2/18/2008		024644/1	69.99	10.00	0.00	0.00	0.00	79.99
FTD	2/18/2008		024646/1	33.50	8.50	0.00	0.00	0.00	42.00
FTD	2/18/2008		024647/1	51.49	8.50	0.00	0.00	0.00	59.99
FTD	2/18/2008		024650/1	40.00	10.00	0.00	0.00	0.00	50.00
FTD	2/18/2008		024651/1	69.99	10.00	0.00	0.00	0.00	79.99
FTD	2/18/2008		024653/1	54.99	15.00	0.00	0.00	0.00	69.99
FTD	2/18/2008		024658/1	30.00	10.00	0.00	0.00	0.00	40.00
FTD			7	349.96	72.00	0.00	0.00	0.00	421.96
TEL			0	0.00	0.00	0.00	0.00	0.00	0.00
AFS			0	0.00	0.00	0.00	0.00	0.00	0.00
DOV	2/18/2008		024645/1	24.00	10.00	0.00	0.00	0.00	34.00
DOV	2/18/2008		024657/1	40.00	10.00	0.00	0.00	0.00	50.00
Dove			2	64.00	20.00	0.00	0.00	0.00	84.00
BLM			0	0.00	0.00	0.00	0.00	0.00	0.00
VNS			0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL INCOMING SALES			9	413.96	92.00	0.00	0.00	0.00	505.96
Outgoing Sales Summary									
FTD			0	0.00	0.00	0.00	0.00	0.00	0.00
TEL			0	0.00	0.00	0.00	0.00	0.00	0.00
AFS			0	0.00	0.00	0.00	0.00	0.00	0.00
Dove			0	0.00	0.00	0.00	0.00	0.00	0.00

Figure 20-17: Sample Balancing Summary Report (page 4)

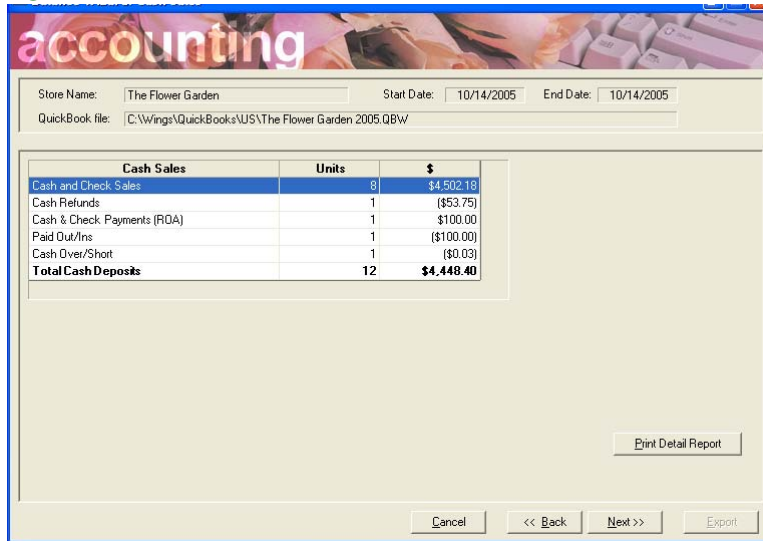
BALANCING SUMMARY REPORT
MARGIE'S FLOWERS
 DATE: 2/18/2008 thru 2/18/2008
 C:\Wings\QuickBooks\US\Margie's Flowers.QBW

BLM	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00
VNS	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL OUTGOING SALES	0	0.00	0.00	0.00	0.00	0.00	0.00	0.00

	Sale Date	Z-Out Date	Order# /Units	Merch. Amount	Delivery Charges	Relay Charges	Sales Tax	Discount Amount	Total
GIFT CERTIFICATES/CARDS									
Gift Certificates Purchased			0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL GIFT CERTIFICATES PURCHASED			0	0.00	0.00	0.00	0.00	0.00	0.00
Gift Certificate Payments			0	0.00	0.00	0.00	0.00	0.00	0.00
Gift Certificates Redeemed			0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL GIFT CERTIFICATES REDEEMED			0	0.00	0.00	0.00	0.00	0.00	0.00
Gift Cards Purchased			0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL GIFT CARDS PURCHASED			0	0.00	0.00	0.00	0.00	0.00	0.00
Gift Cards Redeemed			0	0.00	0.00	0.00	0.00	0.00	0.00
TOTAL GIFT CARDS REDEEMED			0	0.00	0.00	0.00	0.00	0.00	0.00
Z-OUT DATE OUTSIDE DATE RANGE									
American Express	2/18/2008		024649/1	75.00	8.95	0.00	0.00	0.00	83.95
American Express	2/18/2008		024649/1	75.00	8.95	0.00	0.00	0.00	83.95
CS	2/18/2008		024648/1	12.50	0.00	0.00	0.00	0.00	12.50
DOV	2/18/2008		024659/1	33.00	10.00	0.00	0.00	0.00	43.00
Visa	2/18/2008		024648/1	12.50	0.00	0.00	0.00	0.00	12.50
Total Outside Date Range			5	208.00	27.90	0.00	0.00	0.00	235.90

- Click **Next** to view your cash sales (if you selected **Detail** in the **Store Selection** screen):

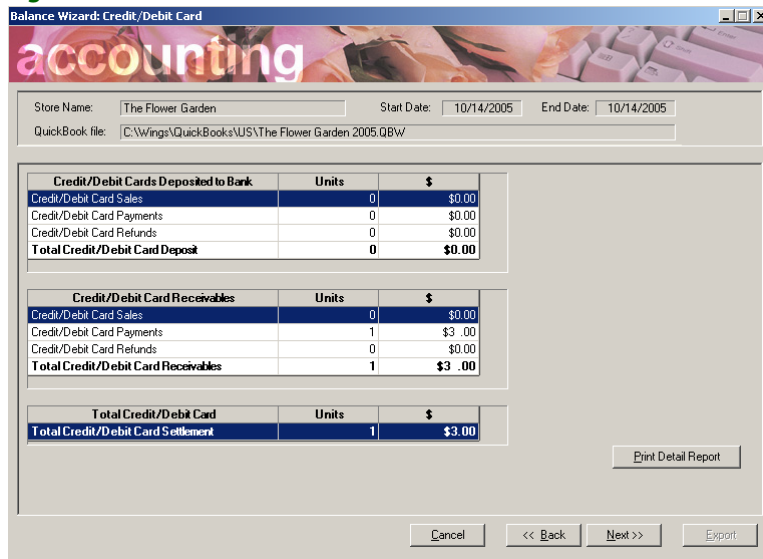
Figure 20-18: Balance Wizard – Cash Sales



This screen displays your cash sales for the given date range. Clicking **Print Detail Report** prints the CASH/CHECKS section on the Balancing Summary Report.

- Click **Next** to view your credit cards and debit cards (if you selected **Detail** in the **Store Selection** screen):

Figure 20-19: Balance Wizard – Credit/Debit Card



This screen displays your credit card and debit data for the given date range. Clicking **Print Detail Report** prints the CREDIT/DEBIT CARDS section on the Balancing Summary Report.

- Click **Next** to view your customer receivables (if you selected **Detail** in the **Store Selection** screen):

Figure 20-20: Balance Wizard – Customer Receivables

Store Name: MARGIE'S FLOWERS Start Date: 2/18/2008 End Date: 2/18/2008
 QuickBook file: C:\Wings\QuickBooks\US\Margie's Flowers.QBW

Customer Receivables	Units	\$
House Charge Sales	3	\$193.43
Manual Ticket Sales	0	\$0.00
Debit Sales	0	\$0.00
ROA Payments	0	\$0.00
Credit Sales	0	\$0.00
Write Offs	0	\$0.00
Finance Charges	0	\$0.00
Total Customer Receivables	3	\$193.43

Sales Transferred to Other Stores	Units	\$
Value of Sales Transferred to Other Stores	0	\$0.00
Income Retained	0	\$0.00
Total Revenue Transferred	0	\$0.00

Sales Transferred from Other Stores	Units	\$
Value of Sales Received from Other Stores	0	\$0.00
Commission Paid	0	\$0.00
Total Revenue Received	0	\$0.00

Print Detail Report

Cancel << Back Next >> Export

This screen displays your customer receivables and store transfer data for the given date range. Clicking **Print Detail Report** prints the HOUSE ACCOUNT section on the Balancing Summary Report.

- 7 Click **Next** to view your wire service receivables (if you selected **Detail** in the **Store Selection** screen):

Figure 20-21: Balance Wizard – Wire Service Receivables

Store Name: The Flower Garden Start Date: 10/14/2005 End Date: 10/14/2005
 QuickBook file: C:\Wings\QuickBooks\US\The Flower Garden 2005.QBW

Wire Service Receivables	Units	\$
FTD	1	\$301.28
TEL	0	\$0.00
AFS	0	\$0.00
Dove	0	\$0.00
BLM	0	\$0.00
VNS	0	\$0.00
Total Wire Service Receivables	1	\$301.28

Outgoing Wire Service Sales Summary	Units	\$
FTD	0	\$0.00
TEL	0	\$0.00
AFS	0	\$0.00
Dove	0	\$0.00
BLM	0	\$0.00
VNS	0	\$0.00
Total Wire Service Payable	0	\$0.00

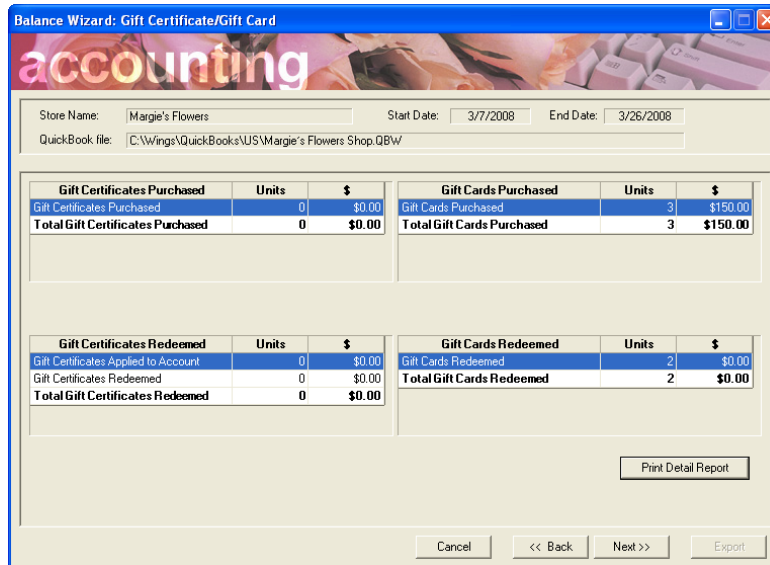
Print Detail Report

Cancel << Back Next >> Export

This screen displays your incoming and outgoing sales information for the given date range. Clicking **Print Detail Report** prints the WIRE SERVICE section on the Balancing Summary Report.

- 8 Click **Next** to view your gift certificates/gift cards sold and redeemed (if you selected **Detail** in the **Store Selection** screen):

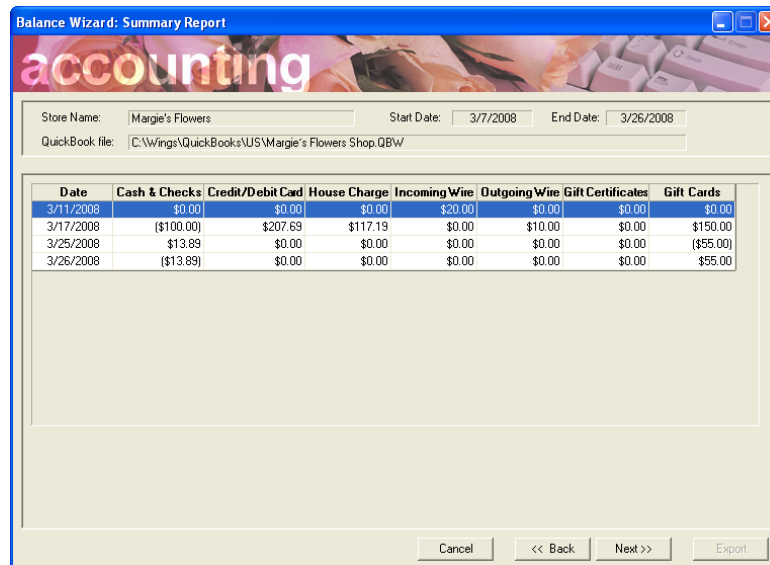
Figure 20-22: Balance Wizard – Gift Certificate/Gift Cards



This screen displays the gift certificates/gift cards purchased and redeemed for the given date range. Clicking **Print Detail Report** prints the GIFT CERTIFICATES/CARDS section on the Balancing Summary Report.

- 9 Click **Next** to view the Summary Report:

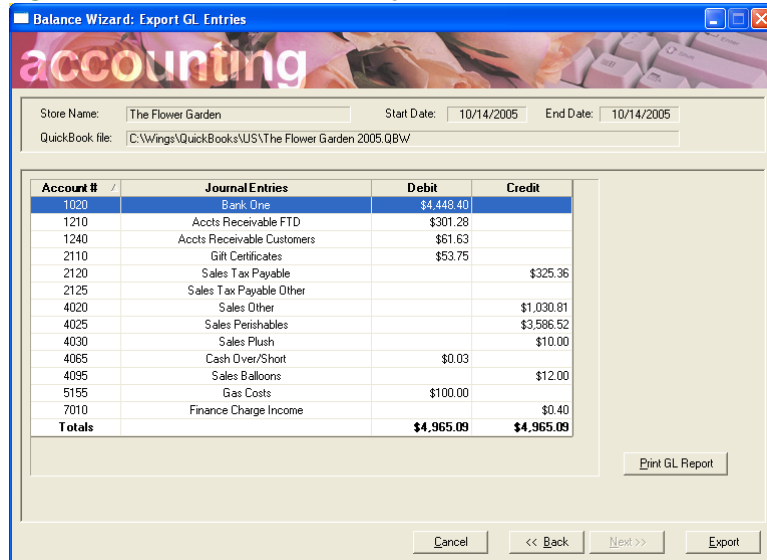
Figure 20-23: Balance Wizard – Summary Report



This screen displays summary information for each date within your date range.

- 10 Click **Next** to view the journal entries that will be made to QuickBooks:

Figure 20-24: Balance Wizard – Export GL Entries



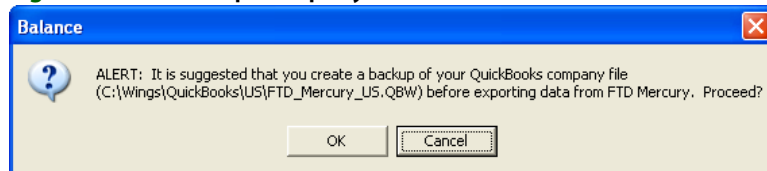
This screen displays the journal entries that will be made to QuickBooks after you click the **Export** button. Each account is listed by the account number and name, and then the amount debited or credited is displayed in the appropriate column. Clicking **Print GL Report** prints the information that you see on the screen (see [GL Export Report](#) on page 20–24).

- 11 At this time you are ready to export. You can use the **Back** button to go back and change any information if necessary. When you are ready to export to QuickBooks, click the **Export** button.
- 12 Next you are warned that it is recommended to create a backup of your QuickBooks company file. Click **Cancel** to stop the process and create a backup of your company file (refer to the QuickBooks online help for instructions). Or click **OK** to continue without backing up.

NOTE

Your QuickBooks company file is backed up every night during your FTD Mercury nightly backup.

Figure 20-25: Backup Company File



After clicking **OK**, you may receive a message instructing you to update the Chart of Accounts.

Figure 20-26: Account Does Not Exist in QuickBooks



In the example above, the user added the product category “Silk” in Mercury Administration but forgot to add a sales account for it in QuickBooks. If an account does not exist in QuickBooks and you are instructed to update the Chart of Accounts, re-run the Chart of Accounts Wizard, then re-export in the Balance Wizard (see [Adding Accounts to the Chart of Accounts](#) on page 20–25).

You receive the following message when the export is complete:

Figure 20-27: Export is Complete

Click **OK** and you are returned to the Accounting screen.

Because QuickBooks does not allow multiple journal entries to Accounts Receivable or Accounts Payable account types, all sales are exported to a **Sales Clearing Account**. Then additional entries are made removing those journal entries from the Sales Clearing Account and placing them into the proper account in QuickBooks. The following accounts are created in QuickBooks so that when you make Accounts Payable or Accounts Receivable journal entries, the customer/vendor accounts are already created for you. **Do not delete these accounts.**

The following customers are added to the QuickBooks customer list:

- » FTD Mercury Customer
- » FTD Wire Service
- » TEL Wire Service
- » FTD Credit Cards

The following vendors are added to the QuickBooks vendor list:

- » FTD, Inc.
- » Teleflora

General Ledger Export History

General Ledger Export History allows you to view summaries of previous GL exports to QuickBooks. You can also print the Balance Summary Report for any of the exports.

TASK To access GL Export History:

- 1 On the **FTD Mercury Main Menu**, click **Accounting**. The Accounting module opens.
- 2 Click **GL Export**.

TASK To print the Balance Summary Report for any of the exports:

Highlight the export and then click Print Balance Summary Report. To see an example of the Balance Summary Report, see [Sample Balancing Summary Report \(page 1\)](#) on page 20-16.

TASK To print a report that lists the journal entries created during the export:

Click **Print GL Export Report**.

Figure 20-28: GL Export Report

GL EXPORT DETAIL REPORT
The Flower Garden
DATE: 10/14/2005 thru 10/14/2005
C:\Wings\QuickBooks\US\The Flower Garden 2005.QBW

Date	Account Number	Account Name	Debit	Credit
GL ACTIVITY BY DAY				
10/14/2005				
	1240	Accts Receivable Customers	\$61.63	\$0.00
	1210	Accts Receivable FTD	\$301.28	\$0.00
	1020	Bank One	\$4,448.40	\$0.00
	4065	Cash Over/Short	\$0.03	\$0.00
	7010	Finance Charge Income	\$0.00	\$0.40
	5155	Gas Costs	\$100.00	\$0.00
	2110	Gift Certificates	\$53.75	\$0.00
	4095	Sales Balloons	\$0.00	\$12.00
	4020	Sales Other	\$0.00	\$1,030.81
	4025	Sales Perishables	\$0.00	\$3,586.52
	4030	Sales Plush	\$0.00	\$10.00
	2120	Sales Tax Payable	\$0.00	\$325.36
	2125	Sales Tax Payable Other	\$0.00	\$0.00
DAILY TOTAL			\$4,965.09	\$4,965.09
TRIAL BALANCE				
	1020	Bank One	\$4,448.40	\$0.00
	1210	Accts Receivable FTD	\$301.28	\$0.00
	1240	Accts Receivable Customers	\$61.63	\$0.00
	2110	Gift Certificates	\$53.75	\$0.00
	2120	Sales Tax Payable	\$0.00	\$325.36
	2125	Sales Tax Payable Other	\$0.00	\$0.00
	4020	Sales Other	\$0.00	\$1,030.81
	4025	Sales Perishables	\$0.00	\$3,586.52
	4030	Sales Plush	\$0.00	\$10.00
	4065	Cash Over/Short	\$0.03	\$0.00
	4095	Sales Balloons	\$0.00	\$12.00
	5155	Gas Costs	\$100.00	\$0.00
	7010	Finance Charge Income	\$0.00	\$0.40
			\$4,965.09	\$4,965.09

Using QuickBooks

This section contains answers to common issues. Refer to the QuickBooks online help for more information on using QuickBooks beyond what is covered in this section.

Changing Company Information

TASK To change the information in your company file:

- 1 In QuickBooks, on the **Company** menu, click **Company Information**. The **Company Information** window opens.
- 2 You must keep this information up-to-date so that the correct information prints on your reports and tax forms. Click **OK** when you are finished updating the information.

Figure 20-29: Updating Company Information

Company Information Type a help question **Ask** **How Do I?** **OK** **Cancel** **Help**

Contact Information

Company Name: Karen's Flower Shop

Address: 3113 Woodcreek Dr., Downers Grove, IL 60515

Phone #: 630-555-4910

Fax #: 630-555-9921

E-mail: karenfloral@mail.com

Country: US

Web Site: www.karensflorals.com

Legal Information (Appears on payroll tax forms)

Legal Name: Karen's Flower Shop

Legal Address: 3113 Woodcreek Dr.

City/State/ZIP: Downers Grove, IL, 60515

Legal Country: US

Report Information

First month in your:

Fiscal Year: January Tax Year: January

Income Tax Form Used: Form 1040 (Sole Proprietor)

Company Identification

Federal Employer Identification No. (FEIN is required for Payroll): 55-5555555

Social Security Number (SSN is used on 1099's if no FEIN is entered): 123-45-6789

Payroll Tax Form Information

Contact: Larry Jones (Name of person preparing and signing payroll tax forms)

Title: Accountant

Phone #: 630-555-8909

For assistance with this window, use the help options at the top of the window, or refer to the QuickBooks online help.

Adding Accounts to the Chart of Accounts

Occasionally you will need to add an account to your QuickBooks Chart of Accounts. For example, the first time you enable store transfers and each time you add a product category or paid in/out type to Mercury Administration, you must create an account for these items before you can export data into QuickBooks. You are warned when this is necessary. For example, when you add a product category to Mercury Administration, you receive the following message:

QuickBooks general ledger account must be created for this Product Category. Please update Chart of Account in Accounting application.

Or when you add a paid out/in type, you are also notified:

QuickBooks general ledger account must be created for this Paid Out/In Type. Please update Chart of Account in Accounting Application.

TASK To add accounts to your QuickBooks Chart of Accounts:

Re-run the FTD Mercury Chart of Accounts Wizard (for example, after you have enabled store transfers or added your product categories and/or paid in/out types).

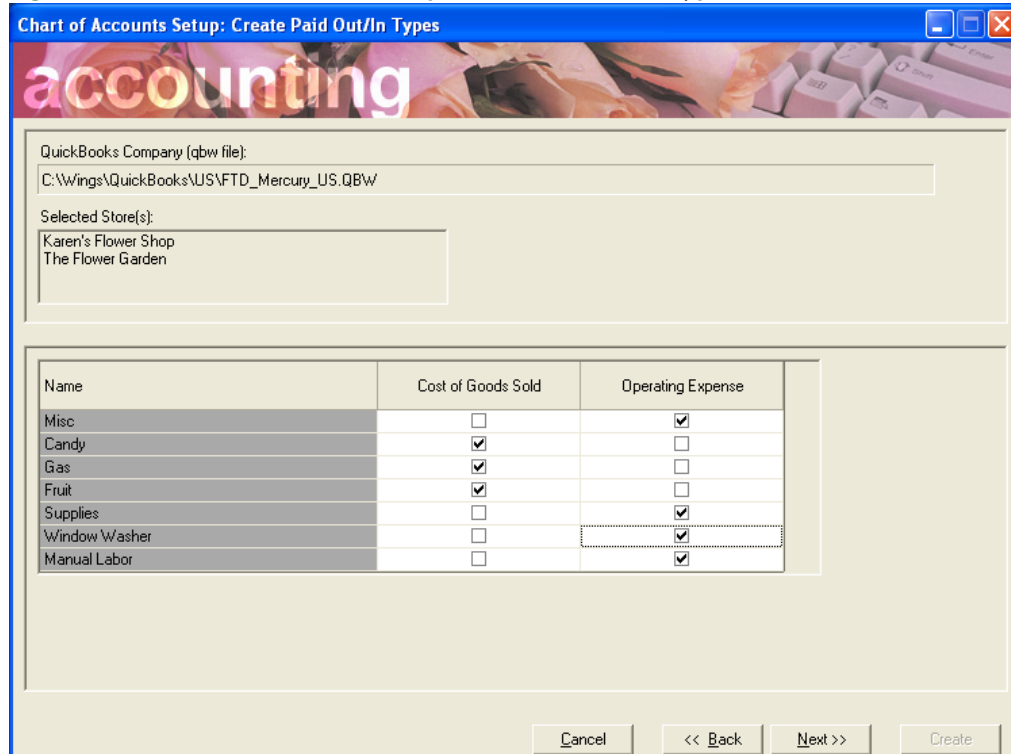
NOTE You cannot delete product categories and paid in/out types in Mercury Administration after accounts are created for them in QuickBooks.

TASK To add a new account to your Chart of Accounts due to enabling store transfers or adding a new product category or paid in/out type:

- 1 On the FTD Mercury Main Menu, click **Accounting**. The Accounting module opens.
- 2 Click **Chart of Accounts**.

- 3 In the first panel of the wizard, highlight the company file for which you are adding an account. Then click **Next**.
- 4 In the **Create Bank Accounts** panel, click **Next**.
- 5 In the **Credit Cards** panel, click **Next**.
- 6 In the **Create Paid Out/In Types** panel, if you added a paid in/out type since the last time you ran the Chart of Accounts Wizard, the paid in/out type is listed without a check mark in either the **Cost of Goods Sold** or the **Operating Expense** columns. Check whether the paid in/out type is related to cost of goods sold or operating expenses by selecting in the appropriate check box.

Figure 20-30: Chart of Accounts Setup: Create Paid Out/In Types Screen

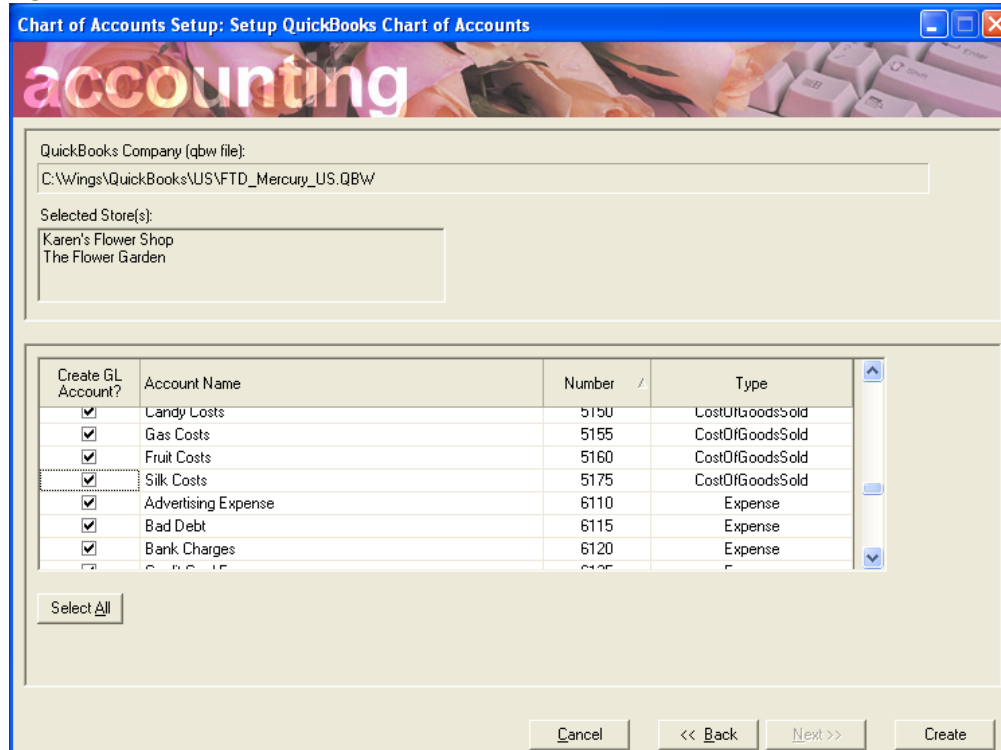


- 7 Click **Next**.
- 8 In the **Setup QuickBooks Chart of Accounts** panel, if you added any product categories or enabled store transfers, this screen lists those product categories or accounts associated with store transfers along with your other accounts. You must scroll down and locate these accounts, then select the **Create GL Account?** check box if you want to include them in your Chart of Accounts. By default the SALES account is selected (because it is required) but the COSTS account is not selected (because it is optional).

NOTE

General Ledger accounts associated with store transfers are created by default, since they are required for correct accounting of store transfers.

Figure 20-31: Select Account



- 9 After checking all of the accounts you want to include, click **Create**. You are notified when the update is complete, and that your new accounts were added to QuickBooks.

Reconciling Accounts to Bank Statements

Your QuickBooks records should agree with all of the financial statements you regularly receive, such as checking and credit cards. The process of balancing your statements with your QuickBooks accounts is called Reconciliation. This process is done in QuickBooks. You should reconcile regularly when you receive your statements. You will have to enter entries into QuickBooks such as service charges and interest.

TASK To access Reconciliation:

- 1 On the QuickBooks **Banking** menu, click **Reconcile**.
- 2 At this point you are prompted for the account you want to reconcile, the ending balance, and for service charge and interest amounts.

For more information, please refer to the QuickBooks online help (after clicking the Banking menu, then clicking Reconcile, click the How do I? button in the upper right hand corner of the window).

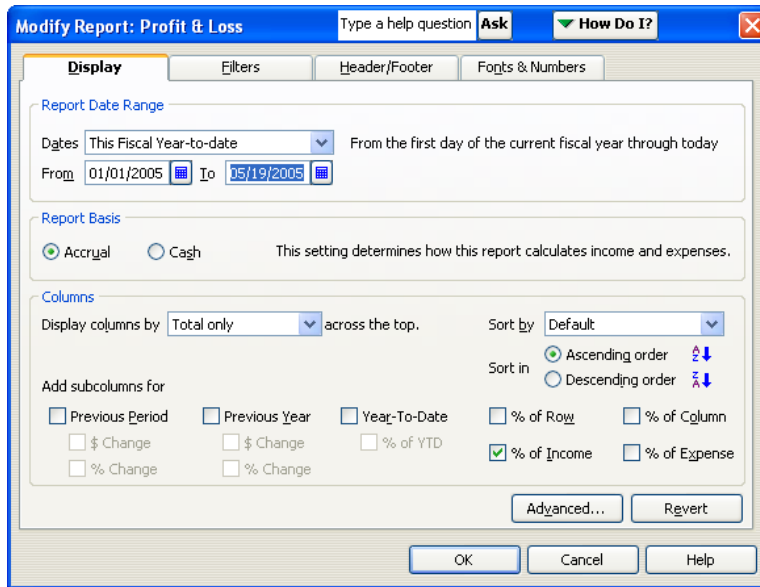
Printing Cost of Goods Reports

The Profit and Loss report in QuickBooks includes all income including inventory and non-inventory sales. To create a report to identify Cost of Goods percentages based on actual inventory sales, you need to create a custom report in QuickBooks. By creating this report you will then be able to determine your actual Cost of Goods based on your entries for the month, year, or any date range you prefer.

TASK To create a custom Cost of Goods report:

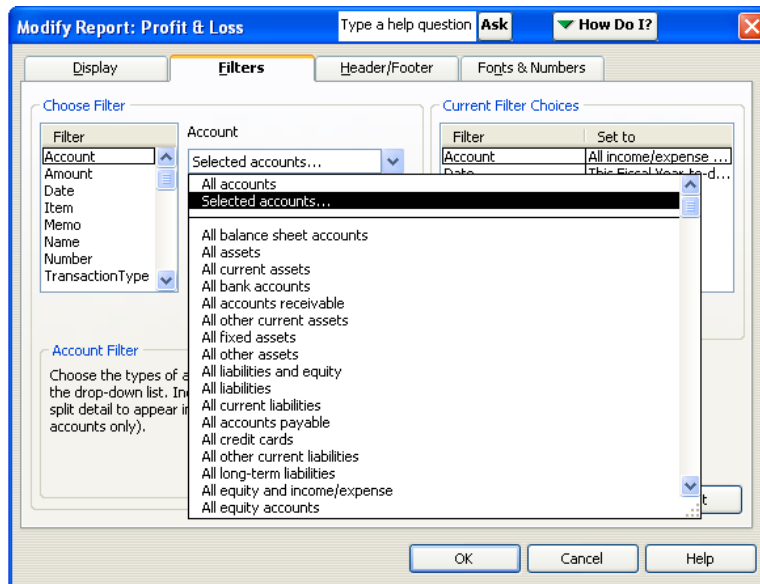
- 1 On the QuickBooks Reports menu, point to **Company & Financial**, and click **Profit & Loss Standard**.
- 2 Click the **Modify Report** button in the upper left hand corner of the report.
- 3 On the **Display** tab, select from the **Dates** list the default date range that you want to use for the report (you can also specify a date range by selecting dates in the **From** and **To** fields). Then click the **% of Income** check box.

Figure 20-32: Modify Report—Display Tab



- 4 Click the **Filters** tab. On the **Filters** tab, click the arrow in the **Account** field to display a list. From the list, select **Selected accounts** (you have to scroll all the way up).

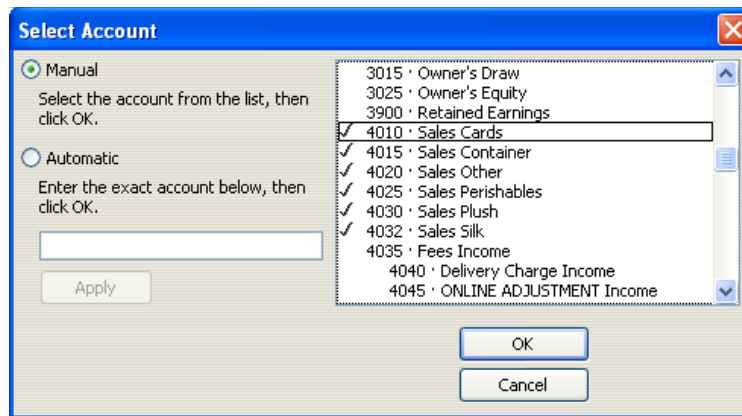
Figure 20-33: Modify Report—Filters Tab



- 5 The **Select Account** window opens. Scroll through the list of accounts and select the accounts that you want to include in the report. Select the sales accounts, then scroll down and select

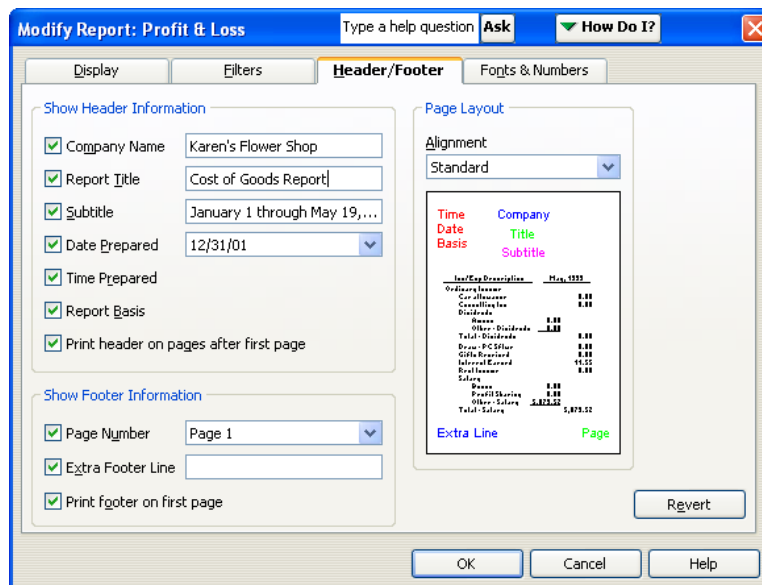
the cost of goods sold accounts that relate to the sales accounts on the report. To select an account, click on it so that a check mark appears next to the account number.

Figure 20-34: Select Account Window



- 6 When you are finished selecting accounts, click **OK**. You are returned to the **Filters** tab.
- 7 Click the **Header/Footer** tab. On the **Header/Footer** tab, type a descriptive name for the report in the **Report Title** field, such as Cost of Goods Report.

Figure 20-35: Modify Report—Header/Footer Tab



- 8 Click **OK**. The report results display on the screen:

Figure 20-36: Sample Cost of Goods Report

	Jan 1 - May 19, 05	% of Income
FTD MECURY FLOWER SHOP		
Profit & Loss		
January 1 through May 19, 2005		
9:26 AM		
05/19/05		
Accrual Basis		
Ordinary Income/Expense		
Income		
4010 · Sales Cards	160.00	0.3%
4020 · Sales Containers	754.23	1.5%
4030 · Sales Other	888.47	1.7%
4040 · Sales Perishable	47,473.85	91.7%
4050 · Sales Plush	2,917.12	5.6%
4090 · Cash Over/Short	20.08	0.0%
4190 · Sales Discounts	-423.24	-0.8%
Total Income	51,790.51	100.0%
Cost of Goods Sold		
5120 · Container Costs	371.00	0.7%
5130 · Other Costs	1,006.50	1.9%
5140 · Perishable Costs	10,913.28	21.1%
5190 · Freight on Purchases	20.00	0.0%
Total COGS	12,310.78	23.8%
Gross Profit	39,479.73	76.2%
Net Ordinary Income	39,479.73	76.2%
Net Income	39,479.73	76.2%

- 9 Click the **Memorize** button at the top of the report and then click **OK**. The report is then saved as a Memorized report.

TASK To access this custom report in the future:

- 1 On the **Reports** menu, point to **Memorized Reports**, and then click on the report.
- 2 When the report opens, you can change the date range for the report at the top of the screen.

Printing Trial Balance Reports

QuickBooks allows you to generate a Trial Balance report for given date. You can view the report on your screen before printing to your printer.

The Trial Balance report is displayed in debit and credit format and creates a balance as of a specific date. It adds up all of your credits and debits so that mistakes can be traced if your debits don't equal your credits.

TASK To print the Trial Balance report:

- 1 On the QuickBooks **Reports** menu, point to **Accountant & Taxes**, and click **Trial Balance**.
- 2 The report displays on your screen. To change the dates on the report, either click the **Dates** list to select a predefined date range, or select individual dates in the **From** and **To** fields to specify a custom date range.

Figure 20-37: Sample Trial Balance Report

Karen's Flower Shop - QuickBooks Pro 2005

File Edit View Lists Company Customers Vendgrs Employees Banking Reports Window Help

Invoice Cust Item Reports Vend Check Bill Reg Acct Rmnd Find Support Backup Feedback

Trial Balance Type a help question Ask How Do I?

Modify Report... Memorize... Print... E-mail Export... Hide Header Collapse Refresh

Dates Last Month From 08/01/2005 To 08/31/2005 Sort By Default

10:32 AM
09/27/05
Accrual Basis

**Karen's Flower Shop
Trial Balance
As of August 31, 2005**

	Aug 31, 05	
	Debit	Credit
1020 · Bank One	3,584.93	
1210 · Accts Receivable FTD	183.99	
1240 · Accts Receivable Customers	1,825.52	
1355 · Sales Clearing Account	0.00	
2010 · Accts Payable FTD		149.31
2110 · Gift Certificates	322.50	
2120 · Sales Tax Payable		368.66
4010 · Sales Cards		10.50
4020 · Sales Other		2,549.65
4025 · Sales Perishables		1,931.00
4030 · Sales Plush		50.00
4032 · Sales Silk		180.00
4035 · Fees Income:4040 · Delivery Charge Income		140.00
4035 · Fees Income:4050 · Relay Fee Income		10.00
4065 · Cash Over/Short	0.17	
4070 · Sales Outgoing Wire Orders		186.65
4075 · Paid to Outgoing Florist	149.31	
4095 · Sales Balloons		34.00
4100 · Sales Candy		90.00
4105 · Sales Fruit Baskets		150.00
4110 · Sales Gourmet		300.00
5150 · Candy Costs	75.00	
5155 · Gas Costs		5.23
6265 · Misc	5.00	
6290 · Supplies	9.00	
7010 · Finance Charge Income		0.42
TOTAL	6,155.42	6,155.42

Open Windows
Trial Balance
Customer Navigator
Chart of Accounts
Help & Support
Report Navigator
Employee List

For more information on the Trial Balance report, see your QuickBooks online help.

Legacy General Ledger Module

IMPORTANT The information in this section applies only to those customers that use the legacy General Ledger module. For information on the Accounting module, see [Accounting Application and QuickBooks Integration](#) on page 20–1.

The General Ledger (GL) Export function allows you to export general ledger files to third-party accounting software. Using the GL module will help you save time as you will no longer need to update figures manually and key them into your third-party accounting software. Once the system is set up, the automatic posting also increases the accuracy of your bookkeeping system. You may perform exports on a daily, weekly, or monthly basis, although weekly exports are recommended. Transactions are exported by sale date.

Basic GL settings such as bank, wire service, and credit card account numbers are defined in Mercury Administration. See [GL Export Screen](#) on page 24–17 for more information on how to access and maintain these settings.

Setting Up Your System for General Ledger Export

In order to complete a GL export, you must first complete the following four steps to set up the process correctly.

- » [Step 1: Creating GL Account Numbers in Third-Party Accounting Software](#)
- » [Step 2: Setting Up Your Third-Party Software](#)
- » [Step 3: Assigning GL Account Numbers to Products](#)
- » [Step 4: Creating GL Export Defaults](#)

Step 1: Creating GL Account Numbers in Third-Party Accounting Software

Create the appropriate account numbers in your third party accounting software (if you have not done so already). Currently, your system is designed to export general ledger files to either QuickBooks or Peachtree software. While Peachtree does not put any restrictions on the account numbers you choose, QuickBooks requires that you use account numbers that are 5 numbers in length, for example, 12345.

After creating your account numbers and completing the appropriate procedure in [Step 2: Setting Up Your Third-Party Software](#) on page 21–2, be sure to print out your Chart of Accounts from

Peachtree or QuickBooks so you may match the account numbers to your products and accounts in [Step 3: Assigning GL Account Numbers to Products](#) on page 21-3.

Step 2: Setting Up Your Third-Party Software

Refer to the additional configuration information, depending on which third-party accounting software package you have chosen, in addition to studying your QuickBooks or Peachtree manual. The additional procedures are required in order to make each import go quickly and smoothly.

Peachtree 2000 Configuration Information

- TASK** To perform your first export if you are using Peachtree 2000 as your third-party accounting software:
- 1 After setting up your store name and accounting information in Peachtree, on the **File** menu, click **Select Import/Export**.
 - 2 In the left pane, click **General Ledger**. In the right pane, click **General Journal**.
 - 3 Click **Import**.
 - 4 When the **General Journal** opens, click the **Field** tab.
 - 5 Click **Deselect All**.
 - 6 Click in the **Show** column so a red check mark appears in front of the following options:
 - » **Date**
 - » **Reference**
 - » **Number of Distributions**
 - » **G/L Account**
 - » **Description**
 - » **Amount**
 - 7 Click the **Options** tab.
 - 8 Click on the arrow under **Import/Export File** and choose the location and file name of your default Peachtree export file. Click **Save**.
 - 9 When the **Save As** window opens, type a name for the **General Journal** name and a description. For example, you may wish to type **GL Import** as a file name and **File Import** as a description. Click **OK**. This will save your GL import settings so that you don't have to reselect the fields you want imported each time you run an import into Peachtree. It also saves the location and file name you created for the import.
 - 10 Click **OK** in the **General Journal** window.
 - 11 Click **Yes** if you wish to make a backup of your file by default, before exporting. Or, click **No**, if you do not wish to make a backup by default.

NOTE If you run a General Ledger report after importing transactions from FTD Mercury, and the report is blank, check the date on the report. If the date on the report is not within the date range of the transactions, you will need to change the system date. To do this, select **Tasks > System > Change Account Period**, click the arrow, and then select the correct date range. You may then rerun the General Ledger report.

QuickBooks Configuration Information

If you have chosen QuickBooks as your third-party accounting software, you will need to follow the procedure below before you perform your first export.

As you create your Chart of Accounts in QuickBooks, each account must have a type associated with it. This allows QuickBooks to import account information correctly from FTD Mercury. There are at least three accounts (**FTD Incoming Wire Receivable**, **FTD Outgoing Wire Payable**, and

Credit Cards) that need to be assigned a particular account type in the **Type** field in order to avoid import errors. If you are a member of any additional wire services you will also need to set up your **TEL Incoming Wire Receivable** and **Outgoing Wire Payable** accounts similarly. Thus, this procedure will need to be completed at least three times, once with each account specified in the list in the procedure.

TASK To configure QuickBooks for each account:

- 1 Double-click the **QuickBooks Pro** icon on your desktop.
- 2 Click **Chart of Accounts** in the left hand menu.
- 3 Click **Account** at the bottom of the **Chart of Accounts** window.
- 4 Choose **New**.
- 5 When the **New Account** window opens, type the name of the account you wish to set up in the **Name** field, and then click the arrow in the **Type** list and choose the correct account type according to the list below:
 - » If you are setting up **FTD Incoming Wire Receivable** in the **Name** field, choose **Accounts Receivable** in the **Type** field.
 - » If you are setting up **FTD Outgoing Wire Payable** in the **Name** field, choose **Other Current Liability** in the **Type** field.
 - » If you are setting up **Credit Cards** account in the **Name** field, choose **Bank** in the **Type** field.
- 6 Type the appropriate information into the remaining fields of the window.
- 7 Click **OK** after adding each account type.

In order to complete your Chart of Accounts, continue creating your remaining GL accounts in the **Chart of Accounts** window.

Step 3: Assigning GL Account Numbers to Products

Assign the appropriate GL account numbers from your Peachtree or QuickBooks Chart of Accounts to each of the products in FTD Mercury through the **Product Entry** window. The **GL Account Number** field allows you to type in the GL account number to which each product or fee should be exported. You will need to repeat the process below for all of the products and fees in your product list.

TASK To assign GL account numbers to products:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 Type the product code, description, or part of the description and click **Search**. The **Get All** button will list all products in your product code database. You may also type the wire service name (for example, FTD) and then click **Get All** to retrieve all products for that wire service.
- 3 When you find the product you are looking for, double-click on the product to open the **Product Entry** window with much of the product's information filled in.
- 4 In the **GL Account Number** field, type the GL account number to which this product or fee should be exported. For example, if you assigned the 82669 account number to your Fresh Flowers Account in Peachtree or QuickBooks, type 82669 in this field for all fresh flowers products.
- 5 If all the information is correct, click **Save**.

TIP

To add a new product to your product list, click the Add button and the Product Entry window will reappear. For more information refer to [Adding New Products](#) on page 8–5.

Step 4: Creating GL Export Defaults

Basic GL settings, such as bank and wire service account numbers are defined in Mercury Administration. See [GL Export Screen](#) on page 24–17 for more information on how to set up these default GL settings so your export will work properly.

General Ledger Export Window

FTD Mercury keeps track of all your store’s transactions. During the General Ledger export process, your system will search through the file containing those transactions. FTD Mercury will then send all transactions made up to and through your chosen end (sale) date to their appropriate accounts in either QuickBooks or Peachtree. Once the file is sent to your third-party accounting software, all transactions included in the export are cleared out of the transaction file, so your system starts fresh after each export.

Transactions that are part of an open Point of Sale session will not be exported until a z-out has been performed and the session is closed.

Mercury orders attached in Order Entry will not be exported if they have one of the following order-related messages associated with them:

Table 21-1: Order-Related Messages that Prevent Exports

Order Type	Related Messages
Outgoing	CAN Pending, DENY, CONfirm
Attach Incoming	FORward, REJect

Exporting the General Ledger File

IMPORTANT Because your first export will include all transactions since you began using FTD Mercury, you should export all transactions prior to your first export. For example, if you wish to create a file for transactions occurring in August of 2000, but your system contains transactions prior to August, you will need to first export all transactions before and including July 31, 2000 by exporting with the end date of July 31, 2000. You should then create an export file with an end date of August 31, 2000. When you import the file in QuickBooks or Peachtree, be sure to import only the August 2000 file.

TASK To perform a General Ledger export:

- 1 On the **Management** menu, click **General Ledger Export**.
- 2 In the **End Date** list, click the arrow and select the cut-off date of the export. The export will include all billing records not previously exported, up to and including the date in this field.
- 3 The **File Name** field will display the path to the file that will be exported. To change this path, click the **Search** button and choose the new file to be exported.
- 4 Click the arrow in the **Store Name** list and choose the name of the store (if you have multiple stores) for which you wish to perform this export.
- 5 Click **Export**.
- 6 Click **Yes** to overwrite the previous file that was exported (this will not affect your General Ledger Export History), or **No** if you wish to send a file without overwriting the previous one.

NOTE Once your FTD Mercury transactions have been exported to QuickBooks or Peachtree, any updates to those transactions cannot be imported into those programs through a second GL export. Instead, you will need to change the transaction information manually in either QuickBooks or Peachtree.

General Ledger Export History Window

The **General Ledger Export History** window allows you view the date of each export as well as the credit and debit totals for each export. You may also use this feature to return to a previous export run so you may recreate or delete the most recently run file.

TASK To return to a previous export run so you can re-create or delete the most recently run file:

- 1 On the **Management** menu, click **GL Export History**.
- 2 In the **Store Name** list, click the arrow and select the store for which you want to view export history.
- 3 When the **General Ledger Export History** window populates with export run dates, select a run date and click **Export** to create the export file.
- 4 Follow the General Ledger export process as you normally would (see [General Ledger Export Window](#) on page 21-4) or click **Delete** to delete the selected export run.

Fax and Email

You can fax and email statements and invoices directly from FTD Mercury. Additionally, you can email delivery confirmations. The FTD Document Center allows you create custom email templates—you can write your own text, import your own graphics, and even insert customer and order information into the email message to personalize the message for each customer.


The Fax & Email Monitor application allows you to view and resend all faxes and email messages sent from your system. It informs you which faxes and email messages have been successfully sent and which have not, so that you can ensure you are reaching all of your customers.

You can fax and/or email statements to your customers rather than (or in addition to) sending statements through the mail. Faxing and emailing statements to your customers saves hours of time printing statements and stuffing envelopes. Over time, it can save you thousands of dollars on labor, statement paper, envelopes, and stamps. See [Statements](#) on page 18–8 for more information on faxing and emailing statements.

You can also fax or email invoices from Ticket Search. See [Faxing and Emailing Invoices](#) on page 9–70.

Fax & Email Monitor Application

The Fax & Email Monitor application allows you to monitor faxes and emails that have been sent (or are pending or scheduled to be sent) from your store via FTD Mercury. For example, if statements/invoices have been sent via fax or email, or if you send email delivery confirmations, you can use this application to view the status of the faxes and email messages sent. If there is an error associated with a fax or email message, you can use this application to resend it. You can also select a different phone number or email address for the fax or email message.

The Fax & Email Monitor automatically attempts to find new faxes and email messages every minute. However if you want to refresh the display automatically, click the  (Refresh) button in the toolbar.

The menu bar, toolbar, and Details button at the bottom of the screen allow you to perform different functions in the program, such as resend a fax or change a fax number. These three items access the same options, and change depending on which tab you are currently working in (for example, if you are in the Email tab, you have an option to change the email address and if you are in the Fax tab, you have an option to change the fax number).

The Fax & Email monitor has three tabs: Fax, Email, and Scheduler. The Fax tab displays by default.

Fax Tab

The Fax tab displays all of the statements or invoices that you have faxed using FTD Mercury. Below is a list of field descriptions for this tab.

NOTE You can sort the faxes by each field type by clicking on the field heading. For example, to sort by Reference Number (account ID), click the Ref No. heading once. You can click on the field heading again to toggle between ascending/descending order.

Table 22-1: Fax Tab Fields

Field	Description
ID	A system-generated ID number for the fax.
Ref No.	The customer account ID.
Description	The date the fax was originally transmitted, along with a brief description to help you identify the fax.
Status	The current status of the fax transmission. Valid statuses are: <ul style="list-style-type: none"> » Pending » In Process » Completed » Scheduled » Failed - Unknown error » Failed - No answer from the destination phone number » Failed - Busy signal from the destination phone number » Failed - No dial tone available when attempting to dial out » Failed - Cancelled by user action » Failed - Fatal Error
Last Updated Date	The latest activity for the fax (for example, the last time the system attempted to send it)
Destination	The customer's fax number.
Attempts	The number of times that the system attempted to send the fax.

Email Tab

The Email tab displays all of the statements/invoices/delivery confirmations that you have e-mailed using FTD Mercury. Below is a list of field descriptions for this tab.

NOTE You can sort the email messages by each field type by clicking on the field heading. For example, to sort by Reference Number, click the Ref No. heading once. You can click on the field heading again to toggle between ascending/descending order.

Table 22-2: Email Tab Fields

Field	Description
ID	A system-generated ID number for the email.
Ref No.	The customer account ID (for statements) or ticket number (for invoices).
Description	The date the email was originally transmitted, along with a brief description to help you identify the email.

Table 22-2: Email Tab Fields (cont.)

Field	Description
Status	The current status of the email transmission. Valid statuses are: <ul style="list-style-type: none"> » Pending » Completed » Scheduled » Failed - SMTP Server is unavailable » Failed - Invalid SMTP Credentials » Failed - Sender domain is invalid » Failed - Unknown error » Failed - User cancelled the scheduled delivery
Last Updated Date	The latest activity for the email (for example, the last time the system attempted to send it)
Destination	The customer's email address.
Attempts	The number of times that the system attempted to send the email.

Scheduler Tab

The Scheduler tab displays all faxes or emails that are waiting for the next interval time to be sent (the scheduled time is displayed in the Scheduled Date/Time field). If you set up your system so that faxes and emails should be sent at a specified later time, these faxes and emails display in this tab until they are sent. Scheduled marketing campaigns also display in this tab.

Below is a list of field descriptions for this tab.

NOTE You can sort the rescheduled items by each field type by clicking on the field heading. For example, to sort by Type, click the Type heading once. You can click on the field heading again to toggle between ascending/descending order.

Table 22-3: Scheduler Tab Fields

Field	Description
ID	A system-generated ID number for the item.
Type	This field indicates if the rescheduled item is a Fax or Email.
Description	A short description of why the item was rescheduled.
Status	The current status of the item. Valid statuses are: <ul style="list-style-type: none"> » Scheduled » Completed » FailedUnknown
Posted Date/Time	The date and time that the fax or email was originally to be sent.
Scheduled Date/Time	The next scheduled attempt to send the fax or email.

Logging Into the Fax and Email Monitor Application

TASK To access the Fax and Email Monitor:

- 1 If you are already logged into FTD Mercury, on the **Tools** menu, click **Fax and Email Monitor**. If you are not logged into FTD Mercury, double-click the **Fax & Email Monitor** icon on your desktop.
- 2 On the **Login** window, in the **Login Name** field, enter your FTD Mercury login name.
- 3 In the **Password** field, enter your FTD Mercury password.
- 4 Click **Login**.

Manually Deleting Email Messages and Faxes

To reduce clutter in the program, Fax & Email monitor purges email messages and faxes after 30 days. However, you may want to manually delete email messages or faxes earlier.

TASK To manually delete email messages and faxes:

- 1 Click one or more faxes or email messages that you want to delete. To select multiple items, hold the **Ctrl** key while you click items.
- 2 Right-click on an item you selected and click **Delete**.

Resending a Fax

If the fax failed to transmit for any reason, you can resend it.

TASK To resend the fax using the same phone number:

Right-click the fax in the list and click **Retry**.

TASK To resend the fax using a different phone number:

Right-click the fax in the list and click **Change Fax Number**.

Resending an Email Message

If the email message failed to transmit for any reason, you can resend it.

TASK To resend an email message using the same email address:

Right-click the email message in the list and click **Retry**.

TASK To resend the email message using a different email address:

Right-click on the email message and click **Change Email Address**.

Rescheduling Jobs

You may need to send a job at a different time than it was originally scheduled. You can reschedule a job so it is sent immediately, or you can specify a new date and time to send it.

- TASK** **To reschedule a job to be sent immediately:**
- 1 Right-click the job and click **Reschedule**.
 - 2 In the window, select the **Send Now** option.
 - 3 Click **OK**.
- TASK** **To reschedule a job to be sent at another specified time:**
- 1 Right-click the job and click **Reschedule**.
 - 2 In the window, select the **Send Later** option.
 - 3 Specify the date and time to send the job.
 - 4 Click **OK**.

FTD Document Center

The FTD Document Center allows you to create templates for email messages that you will send from FTD Mercury. You can create several different delivery confirmation templates, as well as email cover letters that can be sent out with statements and invoices.

If you are using delivery confirmation, FTD Mercury allows you to select different templates for local and outgoing orders. Sample templates are available to view in the FTD Document Center; however you must create your own templates to use in FTD Mercury. You can open the sample templates, customize them to your needs, and save them under a different name.

To create and use email templates in FTD Mercury, first create the template in the FTD Document Center. The FTD Document Center allows you to create custom templates by importing your own graphics, customizing the font, background, and merging data fields to create personalized templates. After the templates are created, use the Email option in Mercury Administration to select which template you want to use for an email cover letter, and assign templates to different delivery confirmation order types (local and outgoing). See [Email Screen](#) on page 24–25 for details.

Opening the FTD Document Center

TASK To open the FTD Document Center from Within FTD Mercury:

On the **Tools** menu, click **Doc Center**.

TASK To open the FTD Document Center when FTD Mercury Is Not Open:

Double-click the **FTD Document Center** icon on your Windows desktop.

Once launched, the main window opens and the Select a template to edit window displays. From this window you can select a template to edit, or you can create a new template.

NOTE This section teaches you about the basic functions of the FTD Document Center, such as creating new templates and document components. For more detailed information on the FTD Document Center, see the online manual. To access the online manual, click the Help menu in the FTD Document Center menu bar, then click Help.

Creating a New Template

TASK To create a new template when FTD Document Center is open:

- 1 If the **Select a template to edit** window is open, click **New**. If it is not open, on the **Template** menu, click **New**.

NOTE You can only have one template open at a time.

- 2 Provide a name, type, short description, and long description for this template. See [Create a New Template Window](#) on page 23-2 for details about these fields.
- 3 Click **OK** to create the new template.

The FTD Document Center then takes you to a blank page, where you can begin selecting components to include in your template.

NOTE When designing your new template, make sure to save it frequently. To do this, click the Template in the menu bar, then click Save.

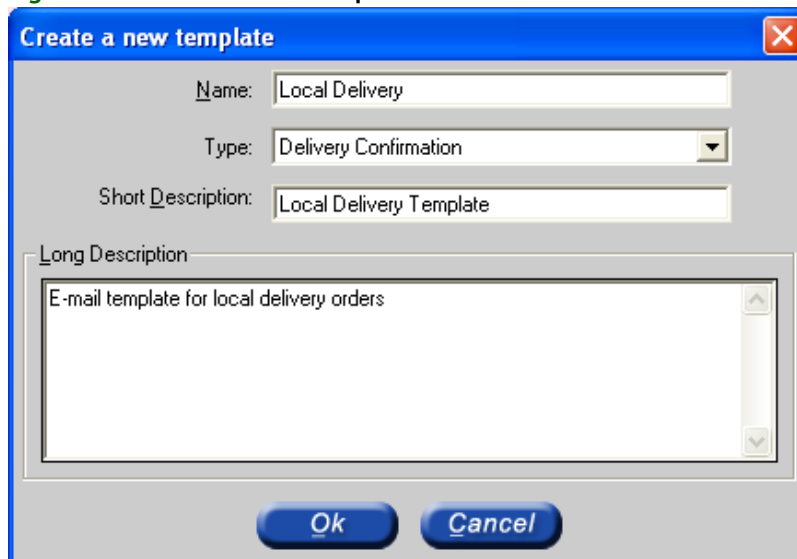
Create a New Template Window

The Create a new template window allows you to provide information about your new template, including its name, type, and description. It contains the following fields:

Table 23-1: Create a New Template Window Fields

Field	Description
Name	Enter the file name of the new template in this field. Valid characters in this field are alphabetic, numeric, and the underscore “_” character. This field is limited to twenty characters.
Type	Select the type of template. You can select Delivery Confirmation or Email Cover Letter.
Short Description	Provide a brief description of this template. This field is limited to fifty characters. This description displays as the template name in Mercury Administration.
Long Description	Enter a detailed description of the template. This field is limited to 256 characters. This field is used for additional description for the template when viewing within the Document Center.

Figure 23-1: Create a New Template Window



Opening an Existing Template

TASK To open an existing template when the FTD Document Center is not open:

- 1 Open the **FTD Document Center**.
- 2 In the **Select a template to edit** window, highlight the template name you want to edit and click **OK**.

TASK To open an existing template when the FTD Document Center is open:

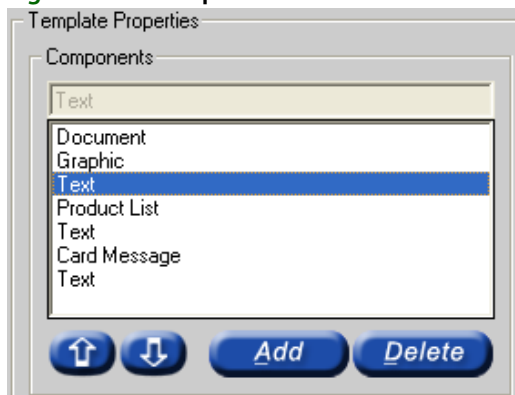
- 1 On the **Template** menu, click **Open**.
- 2 In the **Select a template to edit** window, highlight the template name you want to edit and click **OK**.

NOTE Only one template can be open at a time.

Customizing Templates

A template can be defined as a series of components, for example graphics, text, etc. The components that make up the template are listed in the Components section. If you are creating a new template, the only component that displays is the Document component. As you add components, they are listed in the same order that they appear in the template, from top to bottom.

Figure 23-2: Components Selection



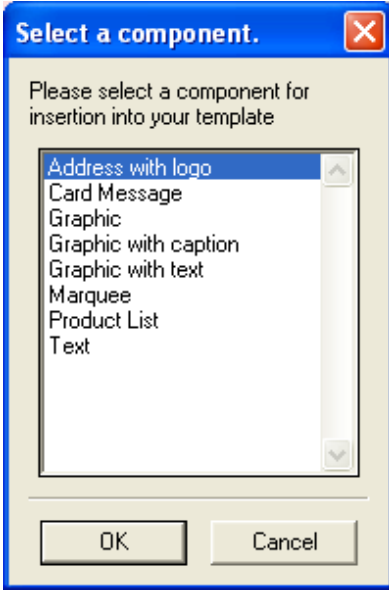
Adding Components to Your Template

TASK To add a component to the template:

- 1 In FTD Document Center, click **Add**.
- 2 In the **Select a component** window, select the component that you want to add and click **OK**.

NOTE When inserting large graphics, you may receive a warning message that the image size exceeds the recommended size; this is normal.

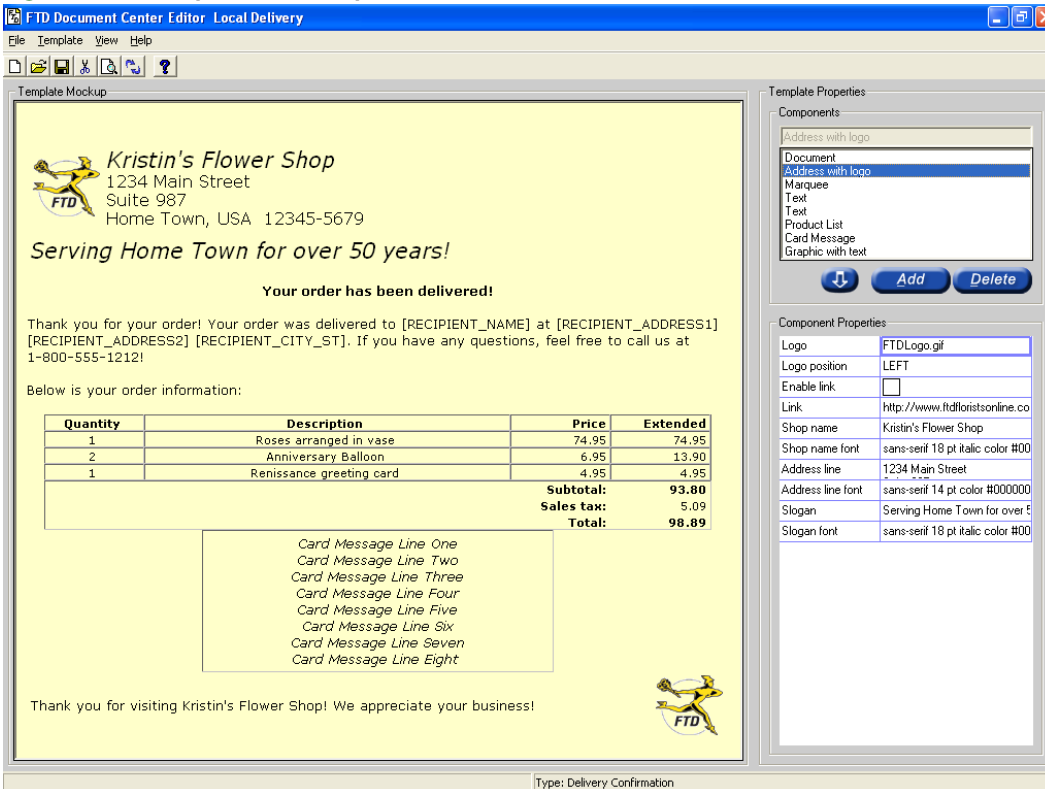
Figure 23-3: Select a Component Window



Sample Template with Components

Below is a sample template to give you an idea of what each of the components can look like in your template (keep in mind that font, alignment, graphics, etc. can be customized).

Figure 23-4: Sample Email Template



Changing Component Order

The components display in the same order that they are listed in the Components list box.

TASK To change the order in which a component displays in the Template Mockup window:

- 1 Select the component in the **Components** list.
- 2 Click the **Up** or **Down** arrows to move the selected component up or down in the template.

Template Components

Below are brief descriptions for each of the components. Read through the component descriptions and decide which components you want to insert in your template.

Table 23-2: Available Components

Component	Description
Document	<p>This component does not display in the Select a Component pop up box but is listed in the Components list box in the main window. Every template has a Document component. The Document component allows you to write a subject line for the email template and customize the background color and image to be used on the template (if any).</p> <p>You will want to write a subject line for the template, otherwise the subject line for the email is read as “no subject” in the customer’s inbox. Since most customer email inboxes are cluttered with mail, create a subject line that will properly identify the email, such as “Kristin’s Florist thanks you for your order!”</p> <p>Available properties include:</p> <ul style="list-style-type: none"> » Subject line—The text that will display in the subject line of the email message that the recipient will receive. » Background color—The background color of the template. » Background image—The image or wallpaper that will be displayed behind the entire template. The background image will not display in the mockup; it will be indicated by a light pink background. Use the Preview button in toolbar to preview the background. » Use background image—Dictates if the background image will be used.
Address with Logo	<p>This component allows you to insert an address block that has a logo. You can type your store name and address, and select the graphic to use (you can select from a list of provided graphics or import your own). See “Graphic” below for graphic rules and instructions on using your own graphics.</p>
Card Message	<p>This component should be used for delivery confirmation email templates only. If you insert the Card Message component, the card message from the customer’s order will be included in the email. It will display as “Card Message Line One, Card Message Line Two,” etc. in the template, however when the delivery confirmation email is sent, the customer’s card message from the order will be merged into the email.</p>

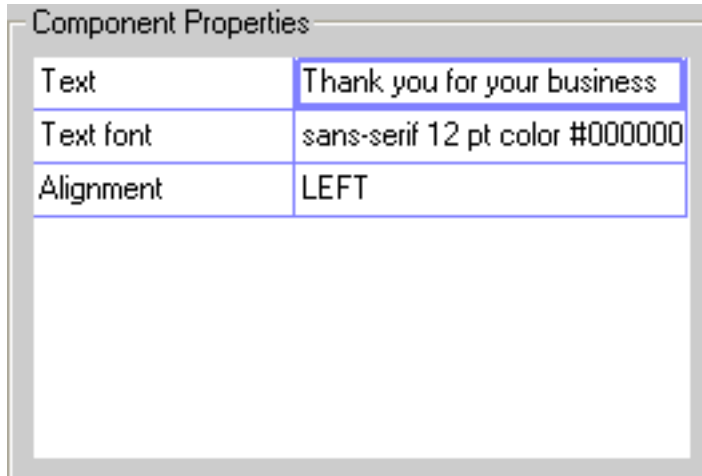
Table 23-2: Available Components (cont.)

Component	Description
<p>Graphic</p>	<p>The Graphic component allows you to display a standalone graphic into the template. You can select from a list of provided graphics or import your own. (Only graphics with the following file extensions can be used: .gif, .jpg or .jpeg.)</p> <p>TASK: To import your own graphic into the template, you can do either of the following:</p> <p>Double-click Graphic in the Insert a Component pop up box, then click Insert to navigate and select the graphic file that you want to use. This copies the file to C: \Wings\DocCenter\images and it will be available to insert from the FTD Document Center.</p> <p>OR</p> <p>Place the graphic file(s) into C: \Wings\DocCenter\images. The graphic file(s) will then be available to insert from the FTD Document Center.</p>
<p>Graphic with Caption</p>	<p>The Graphic with Caption component displays a graphic with text below it. You can customize the graphic, alignment, and font. (See “Graphic” above for graphic rules and instructions on using your own graphics.)</p>
<p>Graphic with Text</p>	<p>The Graphic with Text component displays a graphic with text on the side of it. You can customize the graphic, alignment, and font. (See “Graphic” above for graphic rules and instructions on using your own graphics.)</p> <p>NOTE: If you insert a graphic that is too wide for the mockup screen to properly display the graphic and text, you receive the message “Warning! Image size exceeds recommended size.” The image can still be inserted into the mockup screen, but you may not be able to see the “Replace with your text” text that is displayed next to the graphic. Make sure that you double-click on the text editor to type in your text (or else “Replace with your text” will be sent out with the email). (You may receive the warning message when inserting additional graphics [of normal size] into your template – this is normal.)</p>
<p>Marquee</p>	<p>The Marquee component displays a scrolling line of text. The line of text does NOT scroll in the Template Mockup window. To see the text scroll, click the Print Preview button in the toolbar.</p> <p>NOTE: As the customer is viewing the email, the marquee may not scroll across the screen, depending on the email program that the customer is using.</p>
<p>Product List</p>	<p>This component should be used for delivery confirmation email templates only. The Product List component displays a list of the products in the order. You can customize which product information should display (product totals, discounts, delivery charges and service fees, etc.) and how fonts should appear.</p> <p>NOTE: The product list that is inserted into the Template Mockup window is not the product information that is sent to the customer. When the delivery confirmation email is sent, the customer’s product information from the order is merged into the email.</p>
<p>Text</p>	<p>The Text component displays a block of text. You can customize the font and alignment of the text.</p>

Changing Component Properties

After inserting components into your template, you will then want to change the way they look. You can do this by changing the component properties.

Figure 23-5: Component Properties Section



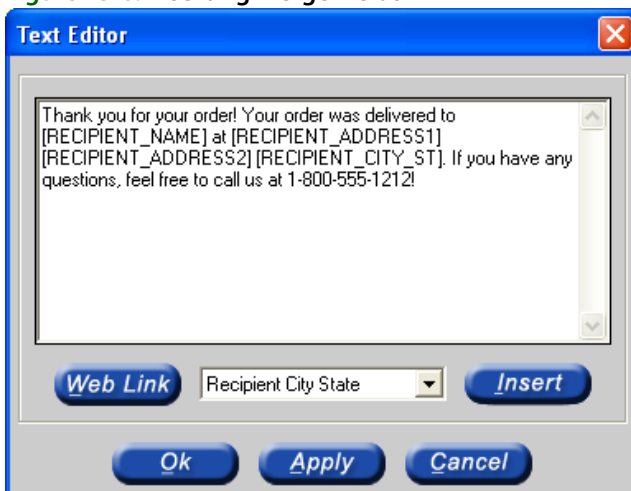
TASK To change component properties:

- 1 In the **Components** list, select the component that you want to change, and the current properties of that component displays in the **Properties** grid.
- 2 Each component has a series of properties that can be used to change the content and appearance of the component. For example, the text in the example above has a 12pt underlined font, and is centered in the template. To change the alignment for example, double-click on **CENTER**. You are then taken to a window that allows you to change the alignment and save.

Inserting Merge Fields

You can include personalized customer and order information in the email (such as customer name, recipient information, etc.) by inserting merge fields. Merge fields act as placeholders for specific customer data that you have saved in FTD Mercury. When the email is sent, those placeholders are replaced with actual data.

Figure 23-6: Inserting Merge Fields



Merge fields are placed within text. Therefore, first insert a Text component and then customize text.

TASK To insert a Text component and add a merge field:

- 1 With your template on the screen, click **Add**.
- 2 Highlight **Text** and then click **OK**.
- 3 Double-click on the existing text value (**Replace with your text!**).
- 4 A text editor displays with the default text. Delete this text and type your own text.
- 5 To insert a merge field, click the arrow in the list at the bottom to display the possible options. Select the merge field and click **Insert**.
- 6 When you are finished, click **OK** and the text displays in the **Template Mockup** window.

Saving the Template

When you are finished customizing your template, save it in the FTD Document Center.

TASK To save your template:

On the **Template** menu, click **Save**.

Exiting the FTD Document Center

TASK To exit the FTD Document Center

On the **File** menu, click **Exit**.

Mercury Administration

The Mercury Administration program allows you to change your program settings such as delivery zones, house account defaults, and printer routing. Some of these settings were set up in the Store Setup Wizard when you initially configured your system.

The Mercury Administration window is divided into a left pane and a right pane, with the left pane displaying the main categories maintained in the Mercury Administration program. The Accounting, Communication, Delivery, Employee, Security, Store, System, and Wire Service folders contain the customizable features. The right pane displays the contents of the folders you have chosen by clicking in the left pane.

When you apply changes to the Mercury Administration program, you receive the following message if you are running the FTD Mercury application software:

Changes have been made to the FTD Mercury program settings. For these changes to take effect you must close and then manually restart the application. Would you like to close this application now?

Click **Yes** to close the FTD Mercury application and then restart the application so that your change in Mercury Administration can be applied to the program. If you click **No**, you can continue to use FTD Mercury, however the change that you made in Mercury Administration is not applied until you later close and then re-open the program.

Mercury Administration Interface

The Mercury Administration interface is divided into two sections. The left pane, called an explorer, is structured like a tree (similar to Windows Explorer). When you select an item in the explorer, its contents appear in the right pane. The explorer also can expand and contract items when you click the + or – next to a folder name.

Navigation

The Mercury Administration program is used to set up or change program settings in your FTD Mercury software. Some items in the Mercury Administration program were set up in the Store Setup Wizard when you set up FTD Mercury for the first time. The preferences/settings that you specified in the Wizard have become your system defaults.

Should you wish to use the keyboard to navigate through the windows in Mercury Administration, remember that the **SPACEBAR** is used here as the **ENTER** key is used in the FTD Mercury program. For example, as you **TAB** through each field and enter your changes, once you reach the bottom of a window and the Apply button appears with a black, dotted box around the text, press the **SPACEBAR** to apply your changes. The same applies to the Undo button.

The Apply and Undo buttons work somewhat differently than their Save and Escape counterparts in the FTD Mercury program. For example, if you make a change in the Dunning Message window and do not click Apply before opening another window, the change is not saved. Therefore, it is important that you click the Apply button to save any changes you have entered before you exit from a window. Also, the Undo button can undo only unsaved (or unapplied) changes.

Toolbars

Toolbars are icons displayed at the top of the window. Toolbars in Mercury Administration change according to which option you are working in.

For example, when you are working in the Employee option, the toolbar looks like this:

Figure 24-1: Employee Toolbar



When you are working in the Job Functions option, the job function toolbar looks like this:


Figure 24-2: Job Function Toolbar



Notice the icons on the toolbar have changed. The first toolbar contains an button that allows you to add a new employee, while the second toolbar contains an button that allows you to add a new job function. Familiarize yourself with the working environment by studying the menus, toolbars, and the system navigation.

Resources for Help

The Mercury Administration program has help resources similar to those in the FTD Mercury program. Should you have an Mercury Administration usability issue, the following resources may be helpful to you:

- » Check the Table of Contents and/or Index of this reference guide for the topic for which you need assistance. You can access an online version of the manual by double-clicking the FTD Mercury Manual icon on your computer's desktop.
- » Use Mercury Administration Online Help to search for your topic. Click  in the Menu Bar to access help.
- » Press **F1** to display a help page.
- » Use Mercury Administration Field help. If you need help with a particular field, right-click on that field to display help text. A brief explanation of that field displays and describes how it is used in the screen.
- » If you cannot resolve your issue using the methods listed above, you can call the Mercury Technology Assistance Center for assistance. See [FTD Mercury Technical Support](#) on page 1-4.

Logging into Mercury Administration

Mercury Administration is accessible only on the server. When you make changes in the program, you are instructed to restart FTD Mercury on the server and any client computers so changes can take effect.

TASK To access the Mercury Administration program if you are logged into FTD Mercury:

On the **Tools** menu, click **Mercury Administration**.

TASK To access the Mercury Administration program if you are not logged into FTD Mercury:

- 1 Double-click the **Mercury Administration** icon on your desktop.
- 2 At the **Login Name** field, type your FTD Mercury login name and press the **TAB** key. If you are logging in for the first time, type `admin`.
- 3 At the **Password** field, type your FTD Mercury password. If you are logging in for the first time, type `admin`. Asterisks (`*****`) appear to protect your password.
- 4 By default your store name appears in the **Store Name** list. 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**.

Double-click Mercury Administration in the left pane to display different folders, from which you can access different areas in Mercury Administration.

The Mercury Administration interface is divided into two sections. The left pane, called an explorer, is structured like a tree (similar to Windows Explorer). When you select an item in the explorer, its contents appear in the right pane. The explorer also can expand and contract items when you click the + or – next to a folder name.

Accounting Folder

The following screens are accessible from the Accounting folder:

- » [HouseAccount Screen](#)
- » [Dunning Message Screen](#)
- » [Questions Screen](#)
- » [Credit Cards Screen](#)
- » [Debit Cards Screen](#)
- » [Tax Code Screen](#)
- » [GL Export Screen](#)
- » [POS Setting Screen](#)
- » [Marketing Screen](#)
- » [Store Transfers Screen](#)

HouseAccount Screen

When setting up a house account for a customer, you must specify a credit limit, how you want to bill the customer, what type of account you want to open, and how you want to apply finance charges. To set a consistent billing pattern, you may set up house account defaults in Mercury Administration. These defaults make entry time quicker, but still can be changed at time of entry.

Figure 24-3: HouseAccount Screen

You can configure the following settings in the HouseAccount screen:

Table 24-1: HouseAccount Settings

Setting	Description
Credit Limit	Enter a default maximum dollar amount of credit to extend to your customers.
Billing Cycle	Click the arrow and select the default cycle at which you want to bill your customers
Default Payment	Click the arrow and select the default payment method for house payment accounts.
Annual Finance Charge	Enter the default annual percentage rate at which you want to apply finance charges to customer accounts. Finance charges are applied per billing cycle.
Minimum Finance Charge	Enter a dollar amount you want to charge as the minimum finance charge for overdue accounts. The system selects either the finance charge calculated for the billing cycle using the annual percentage rate or the amount you enter here, whichever is greater.

Table 24-1: HouseAccount Settings (cont.)

Setting	Description
Finance Grace Period	Click the arrow to select the default number of days you want to wait before assessing finance charges to customer accounts.
Finance Cycle	Click the arrow to select the cycle at which you want to assess finance charges.
Terms on Account	Type any additional text you wish to be printed on customer statements. For example, Receive a 5% discount if you pay within 10 days.
Exclude Past Due Finance Charges	<p>If you select this option, by default, FTD Mercury will exclude finance charges when computing new finance charges on past due balances. If you do not select this option, FTD Mercury will include finance charges in this calculation when they are past due.</p> <p>Essentially, when this option is not selected, any new finance charges will be based on past balances plus any previous finance charges. When you select the option, previous finance charges are omitted from the calculation. The system only calculates finance charges in the calculation if the finance charge is also past due.</p> <p>IMPORTANT: Previously computed finance charges are not recalculated when this setting is changed. Finance charges are calculated based on this setting at the time the finance charges are generated.</p>
Default Account Type	<p>Select either Balance Forward Accounting or Open Item Accounting.</p> <ul style="list-style-type: none"> » Balance Forward Accounting—Customers with Balance Forward accounts receive statements that show running unpaid balances. As payments are made, the payment amount is subtracted from the oldest invoice. » Open Item Accounting—Use Open Item accounts for corporations and companies that pay by invoice (or other customers that prefer to do so). As each payment is made, the payment must be applied to an individual ticket.
Email Statements	Select this option to configure house accounts by default to email statements to customers automatically when the statements are generated.
Fax Statements	Select this option to configure house accounts by default to fax statements to customers automatically when the statements are generated.
Print Statements	Select this option to configure house accounts by default to print statements to mail to customers.
Print Dunning Messages	Select this option to automatically print dunning messages at the bottom of statements when they are generated. For more information, see Dunning Message Screen on page 24-6.
Receive Payment Allocation Method	<p>If you have multiple stores, select whether you want to allocate payments only to invoices in the store where payment is received or to invoices from all stores.</p> <p>For Balance Forward accounts, when you select to allocate to all invoices for all stores, FTD Mercury applies payment to all invoices for the customer (regardless of where the purchase was made). If you select to allocate only to the store where they payment is received, FTD Mercury only applies the payment to purchases made in the same store where the payment is received..</p>

Accessing the HouseAccount Screen

TASK To access the HouseAccount screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Accounting** folder.
- 4 Double-click **HouseAccount**. The **HouseAccount** screen opens.

Setting Up House Account Defaults

TASK To set up house account defaults:

- 1 In Mercury Administration, access the **HouseAccount** screen.
- 2 In the **Credit Limit** field, enter a default maximum dollar amount of credit allowed for your customers.
- 3 From the Billing Cycle list, select the default billing cycle for your customers with house accounts.
- 4 From the **Default Payment** list, select your preferred payment method for house accounts.
- 5 In the **Annual Finance Charge** field, enter the default percentage at which you want to apply finance charges to customer accounts. Finance charges are applied per billing cycle.
- 6 In the **Minimum Finance Charge** field, enter a dollar amount that you want to charge as a minimum finance charge for overdue accounts. FTD Mercury selects either this amount or the monthly calculated amount using the **Annual Finance Charge Percentage**, whichever is greater.
- 7 From the **Finance Grace Period** list, select the default number of days you want to wait before assessing finance charges.
- 8 From the **Finance Cycle** list, select the cycle at which you want to assess finance charges.
- 9 In the **Terms on Account** field, type any additional text you want to be printed on customer statements.
- 10 In the **Finance Charge Calculation** area, select whether you want to exclude past due finance charges when calculating additional finance charges.
- 11 Select whether, by default, house accounts will be created using **Balance Forward Accounting** or **Open Item Accounting**.
- 12 Set the defaults for statements, including whether you want to print, fax, and/or email statements, and whether you want to print dunning messages on statements for house accounts.
- 13 In the **Received Payment Allocation Method** area, select whether you want to allocate payments only to invoices in the store where payment is received, or to invoices across all stores.
- 14 Click **Apply** to save the information before exiting this screen.

Dunning Message Screen

Dunning messages are reminders of payment that appear on a customer's statement. You may set up your own default messages for current customer statements or statements for customers that are 30, 60, 90, or 120+ days past due. When these dunning messages are set up, they appear on all customer statements. If you would not like dunning messages to appear on a specific customer statement, you may clear the Print Dunning Message option in the House Account tab of the Customer Detail Information window for that customer.

Figure 24-4: Dunning Message Screen

Current:	We Appreciate Your Business!
30 Days Late:	Your Account Is Past Due!
60 Days Late:	YOUR ACCOUNT IS 60 DAYS PAST DUE. PAYMENT IS REQUIRED IMMEDIATELY
90 Days Late:	Remit Payment In 5 Days Or Contact Us!
120+ Days Late:	
Finance Charge Title: <input type="text" value="Finance Charge"/>	
<input type="button" value="Apply"/> <input type="button" value="Undo"/>	

You can configure the following settings on this screen:

Table 24-2: Dunning Message Settings

Setting	Description
Current	Enter the dunning message you want to use if the customer account is current.
30 Days Late	Enter the dunning message you want to use if the customer account is 30 days late.
60 Days Late	Enter the dunning message you want to use if the customer account is 60 days late.
90 Days Late	Enter the dunning message you want to use if the customer account is 90 days late.
120+ Days Late	Enter the dunning message you want to use if the account is 120 days or more late.
Finance Charge Title	Enter the name of the line item you want to use on statements for the finance charge. For example, instead of calling it a Finance Charge, you may want to call it a Rebilling Fee.

Accessing the Dunning Message Screen

TASK To access the Dunning Messages screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Accounting** folder.
- 4 Double-click **Dunning Messages**. The **Dunning Messages** screen opens.

Configuring Dunning Messages

TASK To configure dunning messages:

- 1 In **Mercury Administration**, access the **Dunning Messages** screen.
- 2 Type the dunning messages you want to include on each statement type in the appropriate text boxes.
- 3 In the **Finance Charge Title** field, enter how you want the finance charge to be itemized on statements.
- 4 Click **Apply** to save your changes.

Questions Screen

User questions, such as **How did you find out about our store?**, are the questions that you want your employees to ask each customer. These questions are displayed in the Order Entry Payments window or the Customer Detail Information window (whichever you specify). These questions help you gain valuable customer information.

Figure 24-5: Questions Screen

Question	Type	Active
How did you hear about our store?	Customer	<input checked="" type="checkbox"/>
Would you like to be on our mailing list?	Customer	<input checked="" type="checkbox"/>
	Customer	<input type="checkbox"/>

Apply

Undo

For each question, you need to set up the following:

Table 24-3: Questions Screen Settings

Setting	Description
Question	Enter the question you want your employees to ask each customer.
Type	Select whether you want the question to be asked in the Customer Detail Information window or in Order Entry on the Payment window.
Active	Select the check box if you want this question to be active in your system. If the box is not selected, the question will remain in your question list, but it will not display in the Customer Detail Information or the Order Entry Payment window until you activate it.

Accessing the Questions Screen

TASK To access the Questions screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Accounting** folder.
- 4 Double-click **Questions**. The **Questions** screen opens.

Adding User Questions

TASK To add user questions to your system:

- 1 In **Mercury Administration**, access the **Questions** screen.
- 2 Click inside of a blank cell in the **Question** column and type a question.
- 3 In the type column, select if you want this question to appear in Order Entry (in the Payment window) or in the Customer Detail Information window.
- 4 Select the **Active** check box for questions that you want to use.
- 5 Click **Apply** to save the information before exiting this screen.

Credit Cards Screen

The **Credit Cards** screen (formerly the **Settlement** screen) in Mercury Administration allows you to configure your credit card and gift card processing settings if you are a member of the FTD Cash-Flo program. You can also specify whether you process credit cards over the Internet, or you use direct dial access. In order to process gift cards, you must process over the Internet.

Figure 24-6: Credit Cards Screen

Communication Method

Direct Dial Access
 Internet Access

Host Settings

Host Address:

Credit/Gift Card Settings

Store Name:

Account Information

Merchant ID:

Terminal ID:

Merchant Category Code:

CCAPI/Gift Card Account Information

Account ID:

Account Password:

Confirm Password:

Expiration Period (Months):

Credit Card Account Maintenance Link: <http://paymentgateway.mercurynetwork.com/>

The Credit Cards screen contains the following settings:

Table 24-4: Credit Cards Screen Settings

Setting	Description
Communication Method	<p>Select whether you use Direct Dial Access or Internet Access. If you select Direct Dial access, the Account Information group becomes active, allowing you to configure direct dial account information for the selected store. If you select Internet Access, you can configure the CCAPI account information (credit cards over the Internet).</p> <p>You cannot change the Communication Method if there are unsettled or pending transactions in FTD Mercury. You need to also remove any previously declined credit card transactions.</p> <p>IMPORTANT: You must have already set your Internet Connection Type to Always Online in the Internet screen in Mercury Administration to configure and use credit cards and gift cards over the Internet.</p> <p>This setting affects all clients connected to this server.</p>

Table 24-4: Credit Cards Screen Settings (cont.)

Setting	Description
Host Address	This value is used when you process credit cards and gift cards over the Internet. By default it is set to https://paymentgateway.mercurynetwork.com/creditcardapi/webapi/CreditCardService.aspx . You should not change this value except when directed to by the Mercury Technology Assistance Center.
Store Name	Select the store for which you are configuring credit card or gift card processing information. You must configure settings for each store separately, although once you make the settings for one store and then select a different store, settings from the first store are retained until you click the Undo button.
Merchant ID	Enter your Merchant ID number in this field. This is a number provided by FTD Cash-Flo personnel. If you do not have a Merchant ID, contact Member Services at 1-800-788-9000 to obtain one.
Terminal ID	Enter the Terminal ID given to you by Global Payments (NDC).
Merchant Category Code	Enter the Merchant Category Code given to you by Global Payments (NDC).
Account ID	Enter your account ID as provided to you by FTD for processing credit cards and gift cards over the Internet.
Account Password	Enter the account password provided to you by FTD. Your password will be masked during entry for security.
Confirm Password	Reenter your password, which will be masked for security.
Expiration Period (Months)	Enter the number of months that new or reloaded gift cards will be valid. The default number of months, 0, means that gift cards do not expire.

Once you have made changes to credit card processing information, click Apply before exiting this screen. If you change the Communication Method or Host Setting, you are required to perform an FTDSutdown and then an FTDStartup to apply these changes.

Accessing the Credit Cards Screen

TASK To access the Credit Cards screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Accounting** folder.
- 4 Double-click **Credit Cards**. The **Credit Cards** screen opens.

Configuring Credit Card and Gift Card Processing over the Internet

Beginning with version 7.1, FTD Mercury allows you to process credit cards over the Internet. Mercury X allows you to also process gift cards using the same functionality that supports credit card processing. This functionality requires a high-speed Internet connection (DSL, broadband, etc.). You must have already set your **Internet Connection Type** to **Always Online** in the **Internet** screen in **Mercury Administration** to configure and use credit cards over the Internet.

Prior to switching to credit card processing over the Internet, you must have settled all outstanding credit card transactions and removed any declined transactions. For more information, see [Credit Cards over the Internet](#) on page 13-1.

TASK To configure FTD Mercury to process credit cards and gift cards over the Internet:

- 1 In **Mercury Administration**, access the **Credit Cards** screen.
- 2 In the **Communication Method** area, select **Internet Access**. The **Host Settings** area and the **CCAPI Account Information** area are enabled.

IMPORTANT If your connection type, set in the Internet screen, is not **Always Online** you will receive a warning message that you need to configure this prior to enabling credit card processing over the Internet.

- 3 The value in the **Host Address** field is already configured. Do not change it unless directed to by the Mercury Technology Assistance Center.
- 4 In the **Account ID** field, enter your account ID as provided by FTD.
- 5 In the **Account Password** field, enter your account password. The password will be masked with asterisks (*) for security.
- 6 In the **Confirm Password** field, reenter your account password.
- 7 Click **Apply** to save your changes before exiting this screen.

Because you changed the **Communication Method**, you will need to perform an **FTDShutdown** and an **FTDStartup**.

TIP If you are setting up multiple stores for processing credit cards over the Internet, after you have set up the first store and applied your changes, change the **Store Name** to the next store. The settings from the first store will be retained (unless you click **Undo**), and you can begin your configurations from that point.

Configuring Credit Card Processing Using Dial Up Access

TASK To configure FTD Mercury to process credit cards using dial up access:

- 1 In **Mercury Administration**, access the **Credit Cards** screen.
- 2 If you have multiple stores, click the arrow and select your store name from the **Store Name** list.
- 3 In the **Merchant ID** field, enter your Merchant ID number. This is a number provided by FTD Cash-Flo personnel. If you do not have a Merchant ID, contact Member Services at 1-800-788-9000 to obtain one.
- 4 In the **Terminal ID** field, enter the terminal ID number given to you by Global Payments (NDC).
- 5 In the **Merchant Category Code** field, enter the merchant category code given to you by Global Payments (NDC).
- 6 Click **Apply** to save the information before exiting this screen.

Maintaining Your Credit Card over the Internet Account

When you sign up for processing credit cards over the Internet, FTD will provide you a user ID and password. You can then use the maintenance link in the Credit Cards screen in Mercury Administration to maintain your account. You will be required to update your account password when you first log into the account; you will use your user ID and password in Mercury Administration to configure credit card processing.

The maintenance link launches your Web browser, displays the credit card maintenance login, and allows you to log in to change your password or request a callback from FTD regarding credit card processing.

Setting the Gift Card Expiration Period

By default, FTD Mercury does not set an expiration date for the gift cards that you sell. If you want gift cards to be valid for a specific number of months, you must enter the number of months in the Expiration Period (Months) field in the Credit Cards screen. Expired gift cards cannot be used for payment and expired gift cards cannot be reloaded.

TASK To set the gift card expiration period:

- 1 In **Mercury Administration**, access the **Credit Cards** screen.
- 2 If you have multiple stores, click the arrow and select your store name from the **Store Name** list.
- 3 In the **Expiration Period (Months)** field, enter the number of months that gift cards will be valid.
- 4 Click **Apply** to save the information before exiting this screen.

Debit Cards Screen

The **Debit Cards** screen allows you to configure settings for accepting debit cards in FTD Mercury. You must be licensed to use debit cards to change information on this screen. For information on purchasing a license and PIN pad hardware from FTD, contact Mercury Technology Sales at 1-800-767-3222.

If your system is licensed for debit card processing in FTD Mercury, the Point of Sale system will check for the presence of the PIN pad device each time Point of Sale is started. If the PIN pad device is not detected, FTD Mercury will warn you and disable debit card payments for the session; the Payments window will not allow you to select Debit as the payment type.

TIP You can disable the warning message in the **FTD Mercury Configuration** window.

Figure 24-7: Debit Cards Screen

The screenshot shows a window titled "Debit Card Settings". Inside the window, there are three input fields: "Store Name" with a dropdown arrow, "HTML Debit" with a text box, and "Developer Debit" with a text box. Below the input fields, there are two buttons: "Apply" and "Undo".

This screen contains the following settings:

Table 24-5: Debit Cards Screen Settings

Setting	Description
Store Name	Select the store name for which you are configuring debit card processing settings. You must configure this separately for each store that will accept debit card transactions.
HTML Debit	Enter the value provided by Mercury Technology Sales.
Developer Debit	Enter the value provided by Mercury Technology Sales.

When you have finished making changes, click **Apply** before exiting this screen. You can also click **Undo** to revert to the previously saved configuration.

Accessing the Debit Cards Screen

- TASK** **To access the Debit Cards screen in Mercury Administration:**
- 1 Launch **Mercury Administration**.
 - 2 Double-click **Mercury Administration** in the explorer pane.
 - 3 Double-click the **Accounting** folder.
 - 4 Double-click **Debit Cards**. The **Debit Cards** screen opens.

Configuring Debit Cards Screen Settings

- TASK** **To configure Debit Screen settings:**
- 1 Access the **Debit Cards** screen in **Mercury Administration**.
 - 2 From the **Store Name** list, select the name of the store for which you are configuring debit card processing settings.
 - 3 In the **HTML Debit** field, enter the HTML Debit value provided to you by Mercury Technology Sales.
 - 4 In the **Developer Debit** field, enter the Developer Debit value provided to you by Mercury Technology Sales.
 - 5 Click **Apply** to save your changes before exiting this screen.

IMPORTANT If you have multiple stores, you need to configure settings for each store separately.

Tax Code Screen

If you are using the Order Entry, Point of Sale, and/or Accounts Receivable modules, the Tax Code screen allows you to set up your tax codes and percentages into the system. You may enter tax rates up to three digits past the decimal point, for example, 6.375. The Mercury Administration program performs its rounding based on the third decimal place. Refer to the valid codes for your shop.

Figure 24-8: Tax Code Screen

Tax 1 Label:

Tax 2 Label:

Description	Sales Tax	Tax 2	Rounding	Tax Code	Tax On Tax
IL Sales Tax	6.500	0.000	4-5 Split	IL	<input type="checkbox"/>
Tax Exempt	0.000	0.000	4-5 Split	TE	<input type="checkbox"/>
Cash Sales	0.000	0.000	4-5 Split	CS	<input type="checkbox"/>
Interstate Commerce	0.000	0.000	4-5 Split	IC	<input type="checkbox"/>
Not Applicable	0.000	0.000	4-5 Split	NA	<input type="checkbox"/>
No Tax	0.000	0.000	4-5 Split	NT	<input type="checkbox"/>
			4-5 Split		<input type="checkbox"/>

The Tax Code screen contains the following settings:

Table 24-6: Tax Code Screen Settings

Setting	Description
Tax 1/Federal Tax Label	<p>For U.S. systems, this field is labeled Tax 1; for Canadian systems, this field is labeled Federal Tax.</p> <p>Enter the label you want to use for your first tax/federal tax. For U.S. systems, this is usually set to Sales Tax or State Sales Tax. For Canadian systems, this is usually set to GST or HST, depending on whether your store is located in a GST or HST province.</p> <p>This label is used in the grid below the labels in the third column, in sales tax reports, and in some other windows in FTD Mercury where sales tax is listed.</p>
Tax 2/Provincial Tax Label	<p>For U.S. systems, this field is labeled Tax 2; for Canadian systems, this field is labeled Provincial Tax.</p> <p>In most cases, if you are a U.S. store, you will leave this field blank. The exception is when you have to collect taxes for a smaller taxing authority, such as a county or city. In this case, label this as City Sales Tax, or similar. For Canadian shops, this should either be QST (for Quebec), or PST for all other provinces.</p> <p>This label is used in the grid below the labels in the third column, in sales tax reports, and in some other windows in FTD Mercury where sales tax is listed.</p>
Description	Enter the name of the tax code in the Description column.
Tax 1/Federal Tax	Enter the tax rate for your tax 1/federal tax.
Tax 2/Provincial Tax	Enter the tax rate for your tax 2/provincial tax.

Table 24-6: Tax Code Screen Settings (cont.)

Setting	Description
Rounding	<p>Select how the tax amounts should be rounded. Consult your state or provincial tax authority for regulations concerning rounding sales tax amounts. You can choose from the following options:</p> <ul style="list-style-type: none"> » 4-5 Split—This rounds the tax amount down if the third digit following the decimal is a 4 or less (for example, if the tax amount is \$5.244, the tax would appear as \$5.24). Or, it rounds the tax amount up if the third digit following the decimal is a 5 or greater (for example, if the tax amount is \$5.245, the tax would appear as \$5.25). » 5-6 Split—This rounds the tax amount down if the third digit following the decimal is a 5 or less (for example, if the tax amount is \$5.245, the tax would appear as \$5.24). Or, it rounds the tax amount up if the third digit following the decimal is a 6 or greater (for example, if the tax amount is \$5.246, the tax would appear as \$5.25). » Truncate—This cuts off the tax amount after the second number following the decimal; the third digit is not considered. For example, if the tax amount is \$5.244 or \$5.247, the tax would appear as \$5.24 in both cases. » Round Up—This rounds the tax amount up regardless of the third digit following the decimal. For example, if the tax amount is \$5.242, the tax would appear as \$5.25.
Tax Code	Enter a short abbreviation for the tax code. Typically, this should be two to three characters in length.
Tax on Tax	If you are required, select Tax on Tax to apply tax 2/provincial tax on top of the tax 1/federal tax percentage.

Once you have finished entering and modifying the tax codes, click **Apply** to save your changes before exiting this screen.

Accessing the Tax Code Screen

TASK To access the **Tax Codes** screen in **Mercury Administration**:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Accounting** folder.
- 4 Double-click **Tax Code**. The **Tax Code** screen opens.

Configuring Tax Codes

- 1 In **Mercury Administration**, access the **Tax Codes** screen.
- 2 In the **Tax 1/Federal Tax Label** field, enter **Sales Tax** if your store is located in the U.S. or either **GST** or **HST** (depending on your province type) if your store is located in Canada.
- 3 In the **Tax 2/Provincial Tax Label** field, leave this field blank if your store is located in the U.S. (unless you have a city or county taxing authority—in this case, enter the taxing authority name and the word **tax**, for example **Chicago Tax**). If you are a Canadian store, enter **QST** if you are in Quebec, or enter **PST** for all other Canadian provinces.
- 4 Click **Apply** to save your tax labels in their appropriate columns.
- 5 In the **Description** column, type in each cell a tax type you must assess (for example, “**IL State Tax**”) as well as a tax type for exempt products. See [Typical Tax Codes](#) on page 24-17 for details.

- 6 In the **Sales Tax** or **GST/HST** column, enter the percentage at which the tax type must be assessed.
- 7 In the **PST** or **Tax 2** column, enter any additional tax percentage(s) that must be assessed (if applicable).
- 8 In the **Rounding** column, select the rounding method for this tax code.
- 9 In the **Tax Code** column, type a tax code abbreviation
- 10 Click the **Tax on Tax** check box if your province or taxing authority requires it.
- 11 Click **Apply** to save the information before exiting this screen.

Typical Tax Codes

You will typically set up the following tax codes:

Table 24-7: Typical Tax Codes

Tax Code	Description
Local Tax Code	Typically, this is either your state sales tax (U.S.) or GST or HST (for Canadian shops, depending on your province type).
Interstate Commerce	In the U.S., this is used for wire out orders. In Canada, this is used for wire out orders to the U.S. In both cases, there should be no taxes on this tax code.
Not Applicable	Used for Paid Out transactions, No Sale transactions, and Finance Charges. There should be no taxes on this tax code.
No Tax	Used for non-taxable products. There should be no taxes on this tax code.
Tax Exempt	Used for churches and non-taxable organizations. There should be no taxes on this tax code.
GST no PST	(Canadian shops only) Used when sending wire orders to PST provinces.
HST no PST	(Canadian shops only) Used when sending wire orders to HST provinces.

GL Export Screen

IMPORTANT This information only applies if you have the legacy General Ledger software (and you do not have the Accounting Module). If you have the Accounting module, all General Ledger functions are accessed from Accounting on the FTD Mercury Main Menu.

If you are using the General Ledger module, the GL Export option allows you to set up the default bank, wire service, and credit card accounts you have set up in your third party accounting software so files are exported to the proper account. Refer to your third party accounting software manual and GL Chart of Accounts for instructions on how to set up your accounts. Please be sure to consult the special setup procedures required to run Peachtree and QuickBooks beginning with [Setting Up Your System for General Ledger Export](#) on page 21-1 before you start the import process.

The GL Export Screen contains the following settings:

Table 24-8: GL Export Screen Settings

Setting	Description
Name	Click the arrow and select the store for which you wish to maintain GL accounts.

Table 24-8: GL Export Screen Settings (cont.)

Setting	Description
Export File Type	Click the arrow and select the third-party accounting software to which you wish to export files.
Export File Path	Enter C: \General . csv.
Accounts Receivable	Enter the account number in your third-party accounting software for the Accounts Receivable account.
Cash On Hand	Enter the account number in your third-party accounting software for the Accounts Receivable account.
Sales Tax Payable 1	Enter the account number in your third-party accounting software for the Accounts Receivable account.
Sales Tax Payable 2	Enter the account number in your third-party accounting software for the Accounts Receivable account.
Bad Debt	Enter the account number in your third-party accounting software for the Bad Debt account.
Finance Charge	Enter the account number in your third-party accounting software for the Finance Charge account.
Cash Register Over/Short	Enter the account number in your third-party accounting software for the Cash Register Over/Short account.
Gift Certificate Redeemed	Enter the account number in your third-party accounting software for the Gift Certificate Redeemed account.
Wire Service	Click the arrow, and choose the wire service account you are maintaining.
Receivable Account	Enter the account number in your third-party accounting software for the Receivable account.
Payable Account	Enter the account number in your third-party accounting software for the Payable Account account.
Commissions Income Account	Enter the account number in your third-party accounting software for the Commissions Income account.
(Credit Card Account Numbers) Type	Click the arrow, and choose the credit card type for which you are creating an account
Receivable Account	Type the accounts receivable credit card account number for the card type you chose.
(POS Paid Out/In Types) Type	Click the arrow and select a Paid Out/In type (see Paid Out/In Types Screen on page 24-76 to learn how to set up Paid Out/In types).
Account	Enter the General Ledger account number for the Paid Out/In type you selected.

Accessing the GL Export Screen

TASK To access the GL Export screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Accounting** folder.
- 4 Double-click **GL Export**. The **GL Export** screen opens.

Configuring GL Export Options

- TASK** **To configure GL Export options:**
- 1 Access the **GL Export** screen in Mercury Administration.
 - 2 Click the arrow in the **Name** field and choose the store for which you wish to maintain GL accounts.
 - 3 In the **Export File** area:
 - a. Click the arrow in the **Export File Type** field, and choose the third party accounting software to which you wish to export files.
 - b. In the **Export File Path** field, type C: \General . csv.
 - 4 In the **Account Numbers** area, type the third party accounting software account numbers for each of the following account types in their appropriate fields:
 - » Accounts Receivable
 - » Cash On Hand
 - » Sales Tax Payable 1
 - » Sales Tax Payable 2 (if applicable)
 - » Bad Debt
 - » Finance Charge
 - » Cash Register Over/Short (POS)
 - » Gift Certificates Redeemed
 - 5 In the **Wire Service Account Numbers** area:
 - a. Click the arrow, and choose the wire service account you are maintaining.
 - b. Type the third party accounting software wire service account numbers for each of the following account types in their appropriate fields:
 - » Receivable Account
 - » Payable Account
 - » Commissions Income Account
 - c. Repeat for all wire service accounts of which you are a member.
 - 6 In the **Credit Card Account Numbers** area:
 - a. Click the arrow, and choose the credit card type for which you are creating an account.
 - b. Type the accounts receivable credit card account number for the card type you chose in step a, above, in the Receivable Account field.
 - c. Repeat for all credit card types.
 - 7 In the **POS Paid Out/In Types** area:
 - a. In the **Type** field, click the arrow and select a Paid Out/In type (see [Paid Out/In Types Screen](#) on page 24–76 to learn how to set up Paid Out/In types).
 - b. In the **Account** field, type the General Ledger account number for the Paid Out/In type you selected.
 - c. Repeat steps a and b for all your **Paid Out/In** types.
 - 8 Click **Apply** to save the information before exiting this window.

POS Setting Screen

The POS Setting option allows you to create default settings for Point of Sale. By default, all POS sales have a “cash sales” customer. This screen allows you specify a default customer for each pay type, and specify whether you want the drawer to open. This screen also allows you to type a message that prints at the bottom of your receipts.

Figure 24-9: POS Setting Screen

Payment Type	Open Drawer	Default Customer	Num Signature Receipt
Cash	<input checked="" type="checkbox"/>	Cash Sales	N/A
Credit	<input type="checkbox"/>	Cash Sales	2
House	<input type="checkbox"/>	Cash Sales	2
Check	<input type="checkbox"/>	Cash Sales	N/A
Debit	<input type="checkbox"/>	Cash Sales	N/A
Write-off	<input type="checkbox"/>	Cash Sales	N/A

Receipt Trailer:

Apply
Undo

The POS Setting screen contains the following settings:

Table 24-9: POS Setting Screen Settings

Setting	Description
Payment Type	The name of the payment type.
Open Drawer	Select this box if you want the cash drawer to open for this type of payment.
Default Customer	Enter the name of the default customer for this type of payment. In most cases, you want this set to Cash Sales for your Point of Sale system.
Num Signature Receipt	For Credit and House payment types, select how many signature receipts will print when the transaction is complete.
Receipt Trailer	Enter any text you want to include on the bottom of your receipts.

When you have finished making changes, click Apply to save them before leaving this screen.

Accessing the POS Setting Screen

TASK To access the POS Setting screen in Mercury Administration:

- 1 Launch Mercury Administration.
- 2 Double-click Mercury Administration in the explorer pane.
- 3 Double-click the Accounting folder.
- 4 Double-click POS Setting. The POS Setting screen opens.

Configuring POS Settings

TASK To configure POS settings:

- 1 In **Mercury Administration**, access the **POS Setting** screen.
- 2 For each payment type, set whether you want the drawer to open, the default customer, the number of receipts you want printed, and the number of receipts for signature you want printed.
- 3 In the **Receipt Trailer** field, enter any information you want included on the receipt.
- 4 Click **Apply** to save your changes before exiting this screen. Upon clicking **Apply** and saving your changes, the system checks to make sure that the customer accounts you entered in the **Default Customer** column exist. If they do not exist, the system warns you to change the customer. Make sure that you typed the account correctly or that the customer account has been created.

Marketing Screen

The Marketing screen in Mercury Administration allows you to set up marketing categories for 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 can create custom categories that help you in your marketing efforts.

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.

You assign the categories to your customers in the Marketing tab of the Customer Detail Information window (see [Marketing Tab](#) on page 7-17 for more information).

Figure 24-10: Marketing Screen

The screenshot shows the Marketing Screen interface. It features two side-by-side panels. The left panel, titled 'Marketing', contains a 'Category' section with an empty text box and an 'Add Category' button. Below this is a list box with the following items: 'Account Type' (highlighted), 'Mailer', 'Promo', and 'Source'. At the bottom of this panel is a 'Remove Category' button. The right panel, titled 'Types', contains a 'Types' section with an empty text box and an 'Add Type' button. Below this is a list box with the following items: 'Business', 'Church', 'Individual', 'Municipal', 'Other', 'School', and 'Synagogue'. At the bottom of this panel is a 'Remove Type' button. At the very bottom of the screen are two buttons: 'Apply' and 'Undo'.

Accessing the Marketing Screen

TASK To access the Marketing screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Accounting** folder.
- 4 Double-click **Marketing**. The **Marketing** screen opens.

Adding Marketing Categories

TASK To add marketing categories in Mercury Administration:

- 1 In **Mercury Administration**, access the **Marketing Categories** screen.
- 2 In the **Category** text box, enter the name of a category. Some examples of categories are account type, birthday month, mailing list, age group, etc. After entering a category in the text box, click **Add Category**.
- 3 With the category highlighted in the text box on the left, enter the first marketing type for that category under the word **Types** (on the right). For example, if the category is “account type,” some related marketing types may be Business, Personal, Non-profit, School, and Other. Enter the first marketing type and then click **Add Type**. Then enter another marketing type for this category and click **Add Type** again, until all marketing types are added to the list.
- 4 Click **Apply** to save your changes before exiting this screen.

Removing Marketing Categories

TASK To remove an existing marketing category:

- 1 In **Mercury Administration**, access the **Marketing** screen.
- 2 From the list of existing marketing categories, select the category you want to remove.
- 3 Click **Remove Category**.
- 4 Click **Apply** to save your changes before exiting this screen.

Removing Marketing Types

TASK To remove an existing marketing type:

- 1 In **Mercury Administration**, access the **Marketing** screen.
- 2 From the list of existing marketing categories, select the category from which you want to remove the marketing type.
- 3 From the list of existing marketing types, select the type you want to remove.
- 4 Click **Remove Type**.
- 5 Click **Apply** to save your changes before exiting this screen.

Store Transfers Screen

Store transfers allows you to share revenue between stores for local and incoming wire orders that are taken at one store but filled at another. In order for a clerk to transfer an order from one store to another, you must enable store transfers in Mercury Administration Store Transfers screen. You also use the Store Transfers screen to set the revenue split that the stores will receive when local and incoming wire orders are transferred.

Figure 24-11: Store Transfers Screen

StoreTransfer

Allow Store Transfers

Revenue Sharing Percentage

Order Type	Selling Commission	Filling Percentage
Local Order	20	80
Incoming Wire Orders	20	80

You can configure the following settings in the Store Transfers screen:

Table 24-10: Store Transfers Settings

Setting	Description
Allow Store Transfers	Select this option to allow one store to transfer orders to another store. When enabled, the Transfer To drop-down list in Order Entry and Point of Sale windows will be available for local and incoming wire orders.
Local Order Selling Commission	Enter the percentage of the merchant amount and delivery charge that the store that takes the order will retain for local orders. The percentage that the filling store will receive automatically appears in the Filling Percentage field.
Incoming Wire Orders	Enter the percentage of the merchant amount and delivery charge that the store that takes the order will retain for incoming wire orders. The percentage that the filling store will receive automatically appears in the Filling Percentage field.

Accessing the Store Transfers Screen

TASK To access the Store Transfers Screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Accounting** folder.
- 4 Double-click **Store Transfers**. The **Store Transfers** screen opens.

Enabling Store Transfers

TASK To enable store transfers in the Store Transfers screen:

- 1 In **Mercury Administration**, access the **Store Transfers** screen.
- 2 Click **Allow Store Transfers**.
- 3 In the Selling Commission field for Local Order, enter the percentage of the merchant amount and delivery charge that the store taking the order will receive. The percentage that the filling store will receive automatically appears in the Filling Percentage field.
- 4 In the Selling Commission field for Incoming Wire Orders, enter the percentage of the merchant amount and delivery charge that the store taking the order will receive. The percentage that the filling store will receive automatically appears in the Filling Percentage field.
- 5 Click **Apply**.

IMPORTANT Because you changed a Store Transfers setting, you will need to perform an FTDSshutdown and an FTDSstartup.

Enabling Accounting for Store Transfers

The first time that Store Transfers is enabled, you will see a warning message reminding you to run the Chart of Accounts Wizard. Running the Chart of Accounts Wizard adds the necessary general ledger accounts for tracking and reporting store transfers in Mercury Accounting. If you do not use Mercury Accounting or do not run the Chart of Accounts Wizard, you can still perform store transfers, but no data on the transfers will appear in Balance Wizard reports.

NOTE If your Mercury Accounting is set up with a single QuickBooks company file for all stores, you only need to perform this task once. If you have a separate QuickBooks company file for each store, you will need to perform this task for each store.

TASK To enable accounting for Store Transfers:

Rerun the FTD Mercury Chart of Accounts Wizard to add general ledger accounts. In the Chart of Accounts Setup QuickBooks Chart of Accounts screen, select the following accounts. For more information, see [Adding Accounts to the Chart of Accounts](#) on page 20–25).

Communication Folder

The Communication folder contains seven options that allow you to configure the way that FTD Mercury communicates via the Internet, phone lines, and the Mercury Network. The following screens are accessible from this folder:

- » [Email Screen](#)
- » [Fax Screen](#)
- » [Internet Screen](#)
- » [MailServer Screen](#)
- » [Mercury Connection Screen](#)
- » [Phone Lines Screen](#)
- » [Remote Delivery Screen](#)

Email Screen

If you want to email your customers delivery confirmations, statements, and/or invoices, the Email screen allows you to configure the way the email messages look and how/when they are sent.

Figure 24-12: Email Screen

Store Name:

Templates

Email Cover Letter:

Delivery Confirmations

Local Delivery:

Outgoing Delivery:

Outgoing Delivery with ANS Received:

Picture Templates

Design Picture:

Recipient Picture:

Outgoing Delivery with Picture Received:

Addressing

Carbon Copy:

Reply To:

BCC Address:

From Alias:

Default Processing Option: Now Later

Default Later Time:

You can configure the following settings in the Email screen:

Table 24-11: Email Settings

Setting	Description
Store Name	Displays the name of the store you are setting up.

Table 24-11: Email Settings (cont.)

Setting	Description
Email Cover Letter	<p>This list displays the name of the email cover letter you want to use for statements and invoices. When a customer receives a statement or invoice via email, the email cover letter is what displays as the content of the email message. The statement or invoice will be an attachment to the email message.</p> <p>If you email statements and/or invoices, select a template from this list. Templates that you created in the FTD Document Center with the type of E-mail Cover Letter are available for selection from this list. Selecting None sends your customers blank email messages with statements or invoices attached.</p>
Local Delivery	<p>Located in the Delivery Confirmations area of this screen, this list allows you to select the name of the default email template that you want to use for local delivery confirmations. This confirmation email message is sent to customers when a local delivery order has been marked Delivered. Select the name of the template from the list, or select None if you do not want to have a default template for local delivery. If None is selected, the clerk must manually select a template at Order Entry.</p>
Outgoing Delivery	<p>Located in the Delivery Confirmations area of the screen, this list allows you to select the name of the default email template that you want to use for outgoing Mercury orders. The confirmation email message is sent when the outgoing order is marked Delivered. Select the name of the template from list, or select None if you do not want to have a default template for outgoing orders. If None is selected, the clerk must manually select a template at Order Entry.</p>
Outgoing Delivery with ANS Received	<p>Located in the Delivery Confirmation area of this screen, this list allows you to select a different email template for orders that received an ANS confirmation message back from the filling florist confirming that the order has been delivered. You may want to select a different template stating that the filling florist has confirmed that the order was delivered. Select the name of the template from the list, or select None if you do not want to have a default template for outgoing orders with ANS messages received.</p> <p>NOTE: If a customer has already been sent a delivery confirmation message on an order and you receive a ANS message back on an order, the system does not send another delivery confirmation message to the customer. Only one delivery confirmation message is sent per order.</p>
Design Picture	<p>Located in the Picture Templates area of this screen, this list allows you to select the name of the default email template to use when you send a customer a picture of the product that you have designed for them. For example, you may want to have a template stating that you would like to share a picture of the product that was designed. Select the name of the template from the list, or select None if you do not want to have a default template for local orders with design pictures.</p>
Recipient Picture	<p>Located in the Picture Templates area of this screen, this list allows you to select the name of the default email template to use when you send a customer a recipient picture. For example, you may want to select a template stating that the recipient would like to share the picture of them receiving their gift. Select the name of the template from the list, or select None if you do not want to have a default template for local orders with recipient pictures.</p>

Table 24-11: Email Settings (cont.)

Setting	Description
Outgoing Delivery with Picture Received	Located in the Picture Templates area of this screen, this list allows you to select a default email template for orders when you receive a message with a picture back from the filling florist. For example, you may want to select a template stating that you have received a picture from the florist that delivered the customer's gift. Select the name of the template from the list, or select None if you do not want to have a default template for outgoing order messages received with pictures.
Carbon Copy	The email address in this field receives a copy of each email message. Note that this address displays in the CC line of the email message that the customer receives.
BCC Address	The email address in this field also receives a copy of each email message. However this address does NOT display in the CC line of the email message that the customer receives (the email address is hidden).
Reply To	If the customer replies to the email message, the new message is sent to this address.
From Alias	You can type a common name in this field to disguise the actual email address from which the message is being sent. For example, you can type Ken's Floral Gift Shop in this field to disguise your store's email address in the From line.
Default Processing Option	This setting allows you to configure whether messages are sent immediately or in a batch at a later time. If you select Later, you must specify the later time in the Default Later Time field.
Default Later Time	If you selected Later as the Default Processing Option, this is the default time that the email messages will be sent.

Accessing the Email Screen

TASK To access the Email screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Communications** folder.
- 4 Double-click **Email**. The **Email** screen opens.

Configuring Email Settings

TASK To configure email settings for FTD Mercury:

- 1 In **Mercury Administration**, access the **Email** screen.
- 2 In the **Store Name** field, select the store for which you are configuring settings.
- 3 In the **Templates** area, from the **Email Cover Letter** list, select the cover letter you want to use, or select **None** if you do not want to use an email cover letter.
- 4 In the **Delivery Confirmations** area, select the default templates to use with local delivery confirmations, outgoing delivery confirmations, and outgoing delivery confirmations with ANSwer messages received.
- 5 In the **Addressing** area, enter any additional email address information.
- 6 Set the value for the **Default Processing Option**. If you select later, set the **Default Later Time**.
- 7 Click **Apply** to save changes before you exit this screen.

Fax Screen

If you want to fax statements and/or invoices to your customers, this screen allows you to configure the way the faxes look and how/when they are sent.

Figure 24-13: Fax Screen

You can configure the following settings on this screen:

Table 24-12: Fax Screen Settings

Setting	Description
Store Name	Select the store which you are configuring from this list.
Fax Cover Letter	From this list, select the cover letter template that you want to use when faxing. You can either leave the default template selected, or select a different template from the list. If you do not want to use a cover letter, select None. To edit any of the fax cover letter templates, see Editing/Creating Fax Cover Letters on page 24-29.
Default Processing Option	If you want to send faxes immediately, select Now in this field. If you want to send faxes in a batch at a scheduled time, select Later in this field. If you select Later, faxes are held until the time specified in the Default Later Time field.
Default Later Time	If you selected Later in the Default Processing Option field, this is the default time that the faxes will be sent.
Number of Retries	If the fax job fails, this is number of times it will try to resend.

Table 24-12: Fax Screen Settings (cont.)

Setting	Description
Time Between Retry Attempts	This field lists the number of seconds to wait between retry attempts.

Accessing the Fax Screen

TASK To access the Email screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Communications** folder.
- 4 Double-click **Fax**. The Fax screen opens.

Configuring Fax Settings

TASK To configure fax settings for FTD Mercury:

- 1 In **Mercury Administration**, access the **Fax** screen.
- 2 In the **Template** area, from the **Store Name** list, select the name of the store for which you are configuring settings.
- 3 From the **Fax Cover Letter** list, select the cover letter you want to use for faxes. If you want to omit the cover page, select **None**. If you want to edit an existing fax cover letter, select the letter and click **Edit**. See [Editing/Creating Fax Cover Letters](#) on page 24–29 for details.
- 4 In the **Processing** area, select the **Default Processing Option**. If you select **Later**, configure the **Default Later Time**.
- 5 In the **Number of Retries** field, set the number of times FTD Mercury will attempt to resend a fax.
- 6 In the **Time Between Retry Attempts**, enter the number of seconds FTD Mercury should wait before trying to send a fax again.
- 7 Click **Apply** to save changes before exiting the screen.

Editing/Creating Fax Cover Letters

If you want to change the appearance of a fax cover letter, a few steps must be taken. You must first make the changes to an existing template to make it appear the way you wish, save it under a different name, then you must open the FTD Document Center and save the change. Follow the instructions below.

- 1 In **Mercury Administration**, access the **Fax** screen.
- 2 In the **Fax Cover Letter** field, select the fax cover letter that you want to change, then click **Edit**. The cover letter opens in an editor window: Make changes to the cover letter as desired.

NOTE Right-clicking on an item allows you to change font, alignment, line, fill, and color. The Insert menu allows you to insert a new merge field, such as the sender or recipient name.

- 3 When you are ready to save the new template, on the **File** menu, click **Save As**.
- 4 In the **File Name** field, type a new name for the cover letter and then click **Save**.

NOTE The name of the cover letter must be less than 16 characters. If it is greater than 16 characters, then the cover letter will not be visible in Mercury Administration.

- 5 Next you must open the FTD Document Center and make a save to any existing template. This allows you to use the new fax cover letter in the FTD Mercury program.

- a. Open the FTD Document Center by double-clicking the **FTD Document Center** icon on your desktop, or in FTD Mercury, on the **Tools** menu, click **Doc Center**.
- b. Highlight an existing template (other than a sample template) and then click **OK**.
- c. With the existing template on the screen, on the **Template** menu, click **Save**.
- d. Click **OK**.

Internet Screen

This option allows you to set up Internet settings for any FTD Mercury service that uses the Internet, such as Wireless Delivery Confirmation and email.

IMPORTANT It is strongly suggested to use this option only with the assistance of the Mercury Technology Assistance Center.

Figure 24-14: Internet Screen

Internet Connection Type

Always Online Dial-Up Dial Client

Permanent

Proxy Server Is Used

Proxy Server: Proxy Port:

Proxy User ID: Proxy Password:

Dial-Up Networking

Internet Service Provider:

Dialing Client

Name:

Authentication Delay: seconds

Apply Undo

The Internet screen has the following settings.

Table 24-13: Internet Screen Settings

Setting	Description
Internet Connection Type	<p>Select your Internet connection type from the following options:</p> <ul style="list-style-type: none"> » Always Online—This means that your system is always connected to the Internet and your computer does not have to “dial up” to connect. For example, you might have a LAN, cable, or DSL connection. If you select this option, the Permanent area is enabled. <p>You must select Always Online to process credit cards over the Internet. If you are already configured (via the Credit Cards screen) to process credit cards in this manner, you cannot change your Internet connection type to Dial-Up or Dial Client.</p> » Dial-Up—This means your system will dial an access number to connect to the Internet. When you select this option, the Dial-Up Networking area is enabled. » Dial Client—This means you are using third-party software (such as AOL) to connect to the Internet. When you select this option, the Dialing Client area is enabled.
Proxy Server Is Used	Select this box if you use a proxy server. If you are unsure, contact your network administrator.
Proxy Server	Enter your proxy server address. To obtain this information, contact your network administrator.
Proxy Port	Enter your proxy server port number. To obtain this information, contact your network administrator.
Proxy User ID	Enter your proxy server user ID. To obtain this information, contact your network administrator.
Proxy Password	Enter your proxy server password. To obtain this information, contact your network administrator.
Internet Service Provider	From this list, select the name of the Internet Service Provider (ISP) you are using. If your ISP is not available in this list, this means the ISP has not been set up in Windows.
Name	From this list, select your ISP name.
Authentication Delay	This value should be set to 60 seconds.

Accessing the Internet Screen

TASK To access the Email screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Communications** folder.
- 4 Double-click **Internet**. The **Internet** screen opens.

MailServer Screen

If you send delivery confirmations or statements via email, you must set up your outgoing mail server using the Mail Server option in Mercury Administration. If you use FTD’s mail server, this

section teaches you how to set up your system to connect to the mail server. If you do not use FTD's mail server, you have to contact your ISP for the information that is required on this screen.

If you use the Web Order Interface, you must also complete the incoming mail server section of the screen. The Web Order Interface is a feature that allows you to retrieve orders from your store's Web site via email and convert them to incoming orders in FTD Mercury. Therefore if you purchased the Web Order Interface, it is required to enter your incoming mail server information in this screen so that those orders can be retrieved. Your incoming mail server is the server that your ISP (Internet Service Provider) uses to manage your email account. If you have multiple email accounts to where Web site orders are sent, you can set up multiple incoming mail server accounts.

Figure 24-15: MailServer Screen

Outgoing Mail Server

Authentication Required

Server Name: Account Name:

Server Port: Account Password:

Incoming Mail Server

Server	Store	Protocol	Port	Account	Password	
mail4.ftdi.com	Margie's Flowers	POP3	110	qalab03	****	Jay W
	Margie's Flowers	POP3				

Outgoing Mail Server Setup Information

It is necessary to set up your outgoing mail server information so that you can send outgoing email messages from FTD Mercury, for example delivery confirmations, statements, and invoices. This information must also be configured if you use the Web Order Interface.

Table 24-14: Outgoing Mail Server Information

Setting	Description
Server Name	If you are using FTD's mail server, this field should display mail.mercurynetwork.com. If you are NOT using FTD's mail server, this is the name of your ISP's email server for OUTGOING email messages. (Your ISP's technical support department should provide you with this information. Ask the technical support department "What is the name of the Email server for OUTGOING email messages?").

Table 24-14: Outgoing Mail Server Information (cont.)

Setting	Description
Server Port	If you are using FTD's mail server, this field should display 587. If you are NOT using FTD's mail server, this is your ISP's mail server port number. (Your ISP's technical support department should provide you with this information. Ask the technical support department "What is the Mail Server Port Number?")
Authentication Required	This option should be checked if your outgoing mail server requires authentication. Some ISPs require authentication to connect to the mail server. If you are using FTD's mail server, this option should be checked. If you are NOT using FTD's mail server, your ISP's technical support department can tell you whether the outgoing mail server requires authentication. Ask the technical support department "Does the outgoing mail server require authentication? If so, what is the account name and password?"
Account Name	This field becomes active only if Authentication Required is checked. If you are using FTD's mail server, type your shop code (with the suffix) followed by @mercurynetwork.com (for example, 905034AY@mercurynetwork.com). The entry in this field is case sensitive, so if you are using FTD's mail server, make sure that the suffix of your shop code is in CAPITAL letters. If you are NOT using FTD's mail server, type the ISP's authentication login name in this field (obtain this information from the technical support department of your ISP).
Account Password	This field becomes active only if Authentication Required is checked. If you are using FTD's mail server, type cat7tell in this field (all lowercase letters). If you are NOT using FTD's mail server, type the ISP's authentication password in this field (obtain this information from the technical support department of your ISP).

Incoming Mail Server Setup Information

If you use the Web Order Interface, it is necessary to set up your incoming mail server information so that FTD Mercury can retrieve your Web site's orders from your email account. To obtain the information required in this section, you have to call your Internet service provider's technical support department. If you have multiple email accounts to where your Web site orders are sent, set up the information using a new row in the table for each account.

You can configure the following settings on this screen:

Table 24-15: Incoming Mail Server Information

Setting	Description
Server	Type your ISP's incoming mail server name. The format is usually three series of numbers or letters separated by periods.
Store	Select the name of the store that uses this email account to receive Web site orders. To select a store, click inside of the cell so that a down arrow appears, then click the arrow and select the store name.
Protocol	Type whether your ISP uses a POP3 or IMAP server protocol.
Port	Type your ISP's outgoing mail server port number.

Table 24-15: Incoming Mail Server Information (cont.)

Setting	Description
Account	Type the email account from where you will be retrieving the Web site orders (for example, if your email address is mystore@email.com, you would type mystore).
Password	Type the password that you use to access the email account. This password is case sensitive.
Subject	Type the email subject line that you use for the orders that are sent from your Web site to this email address. FTD Mercury only creates orders from email messages with this subject line. Therefore it is important that you type the subject line exactly as it appears in the order email messages.
Encryption	If the order email is encrypted (your Web site encrypts the email message when it is sent to your email account), select the encryption method that your Web site designer uses (to select an encryption type, click inside of the cell so that a down arrow appears, then click the arrow to select an encryption method). If your Web site does not use encryption, leave the default value to None.
Encrypt P/W	If you selected an encryption method in the Encryption column, type the encryption password that your Web site designer selected for your Web site. If you selected None in the Encryption column, leave this field blank.
Referral Code	Select the referral code that you want to use for your Web orders. If you have not already created a referral code for Web orders, it is highly recommended that you create one so that you can track sales generated by your Web site. See Referral Codes Screen on page 24–73 for details.
Send Errors To	If there are errors with an order, FTD Mercury email messages you the order indicating that there was an error. Type the email address where you want to receive these orders.
Polling Interval	The Polling Interval field displays how often your system connects to the Internet to receive orders from the email account. By default, your system checks for orders every 20 minutes. You can change this time to suit your needs, however keep in mind that if you have dial-up Internet access, each time the system dials out it is billed as a local telephone call.

NOTE If you have dial-up Internet access, you might want to check your telephone billing plan to see what type of plan you have. Most telephone companies offer packages with local unlimited local calls. It is recommended to purchase a phone plan with unlimited local calls so that you can retrieve orders at least every 20 minutes, while keeping your phone bill low.

To save changes on this screen, click Apply. Clicking Undo reverts the settings on this screen back to when they were last saved.

Accessing the MailServer Screen

TASK To access the Email screen in Mercury Administration:

- 1 Launch Mercury Administration.
- 2 Double-click Mercury Administration in the explorer pane.
- 3 Double-click the Communications folder.
- 4 Double-click MailServer. The MailServer screen opens.

Mercury Connection Screen

If you are setting up your system to use the Internet to send and receive orders, the Mercury Connection screen allows you to enter your Internet account information.

IMPORTANT It is strongly suggested to use this option only with the assistance of the Mercury Technology Assistance Center.

NOTE In previous releases of FTD Mercury, this information could be found in the Account and Host tabs of the Connection Settings option.

Figure 24-16: Mercury Connection Screen

Communication Method

Direct Dial Access Internet Access

Internet Settings

Account Information

Account ID:

Account User ID:

Account Password:

Confirm Password:

Host Settings

Host Address:

Host Port: Polling Interval: minutes

Blackout Begin: Blackout End:

Time Settings

Current Time Zone:

Current Time:

You can configure the following settings on this screen:

Table 24-16: Mercury Connection Screen Settings

Setting	Description
Communication Method	Select your connection method. There are two options available: <ul style="list-style-type: none"> » Direct Dial Access—Select this if you are using the Mercury Network to send and receive orders and messages. If this option is selected then all other options in this window are disabled. You do not have to set up any information on this screen if you are using the Mercury Network. » Internet Access—Select this if using the Internet to send and receive orders and messages (you must sign up for an Internet Access account with FTD). If this option is selected then all other options in this window become active. There are several setups that you have to enter so that FTD Mercury can properly send and receive orders and messages over the Internet. It is highly suggested to make changes in this section only with the assistance with the Mercury Technology Assistance Center.
Account ID	Enter the account ID number that was provided to you when you signed up for the Internet Access account with FTD.
Account User ID	Enter the Account User ID that was provided to you when you signed up for the Internet Access account with FTD.
Account Password	Enter the account password that was provided to you when you signed up for the Internet Access account with FTD. Asterisks (*****) will mask the password as you type.
Confirm Password	Enter your password again to confirm it.
Host Address	This is the address where your system sends and receives your orders and messages. This should be set to md2.mercurynetwork.com, unless otherwise specified by an FTD Mercury Support representative.
Host Port	Type 80 in this field, unless otherwise instructed by FTD Mercury Support.
Polling Interval	Enter how often your system will dial out to send and receive any waiting orders or messages.
Blackout Begin	Enter the time the blackout period starts.
Blackout End	Enter the time the blackout period is to end.
Current Time Zone	Your current time zone. If this is incorrect, click Change Time Zone to set the value to the correct time zone.
Current Time	Your current time. If this is incorrect, click Change Time to set your time.

Accessing the Mercury Connection Screen

TASK To access the Email screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Communications** folder.
- 4 Double-click **Mercury Connection**. The **Mercury Connection** screen opens.

Phone Lines Screen

The Phone Lines screen allows you to configure the PLLS (Phone Line Locking Server), which manages the phone lines that you use with FTD Mercury. Here you should indicate how you want to share your existing phone lines.

IMPORTANT This option should only be used with the assistance of the Mercury Technology Assistance Center.

The Phone Lines option does not assign a function to a physical phone line, rather you are indicating here how you want them shared. For example, if you want Internet and fax to share a phone line, you would assign them to the same number phone line. You can assign them to any phone line (#1 or #2 for example). You are not telling the system which phone line to use, rather you are telling the system how you want to share it.

If you use broadband or DSL to connect to the Internet, then you should select None for Internet.

If you use MNAPI for the Mercury Network (you send Mercury orders and messages over the Internet), select None for Mercury.

If you share a phone line, (for example, between fax and credit card), the PLLS monitors the lines so that they “take turns.” For example if you send a credit card and a fax at the same time, the credit card is transmitted first, then the PLLS frees the line so that the fax can be sent.

Figure 24-17: Phone Lines Screen

Number of Phone Lines:

Network Type to Phone Line Mapping

Internet Line: Suspend Internet Line Usage

Fax Line: Suspend Fax Line Usage

Mercury Line: Suspend Mercury Line Usage

CC Dial-up #1: Suspend CC Dial-up Line Usage

Dial Prefix:

The Phone Lines screen contains the following settings:

Table 24-17: Phone Lines Settings

Setting	Description
Number of Phone Lines	Enter the number of phone lines you have available for FTD Mercury to use.
Internet Line	From this list, select a phone line you will use to connect to the Internet. This is the line that you use to send orders (if you use the Internet to send orders), as well as the line you use to browse the Web.
Fax Line	From this list, select a phone line to use for faxes.

Table 24-17: Phone Lines Settings (cont.)

Setting	Description
Mercury Line	From this list, select a phone line to use for the Mercury network.
Credit Card Line	In the first list, select CC Dial-up #1 for the first credit card line, then from the second list, select a phone line you want to use for that credit card connection. If you have additional credit card phone lines, select CC Dial-up #2 (and so on), assigning each a phone line number.
Suspend Internet Line Usage	Select this option to suspend the Internet phone line from use.
Suspend Fax Line Usage	Select this option to suspend the fax phone line from use.
Suspend Mercury Line Usage	Select this option to suspend the Mercury phone line from use.
Suspend CC Dial-up Line Usage	Select this option to suspend the selected credit card phone line from use.
Dial Prefix	If you have to press a number to reach an outside line (such as 9), enter the number in this field followed by a comma. The comma after the number forces the system to pause before dialing the number.

Accessing the Phone Lines Screen

TASK To access the Email screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Communications** folder.
- 4 Double-click **Phone Lines**. The **Phone Lines** screen opens.

Remote Delivery Screen

The Remote Delivery option is used to set up the Wireless Delivery Confirmation module. For more information, see [Step 4: Set Up Remote Delivery in Mercury Administration \(Support Assisted\)](#) on page 14-34.

Figure 24-18: Remote Delivery Screen

Account Information

User ID:

Company ID:

Account Password:

Confirm Password:

Host Settings

Host Address:

Host Port: Polling Interval: minutes

GPS

Save GPS data for (days):

The Remote Delivery screen contains the following settings:

Table 24-18: Remote Delivery Screen Settings

Setting	Description
User ID	Enter your user ID for Wireless Delivery Confirmation. This is provided to you by the Mercury Technology Assistance Center.
Company ID	Enter your company ID for Wireless Delivery Confirmation. This is provided to you by the Mercury Technology Assistance Center.
Account Password	Enter your password for Wireless Delivery Confirmation. This is provided to you by the Mercury Technology Assistance Center.
Confirm Password	Enter your password again to confirm it.
Host Address	The address for the Gearworks wireless delivery Web site. This is provided to you by the Mercury Technology Assistance Center.
Host Port	Enter the host port for Wireless Delivery Confirmation. This is provided to you by the Mercury Technology Assistance Center.
Polling Interval	Specify the period of time in minutes in which your system will check for wireless delivery orders and download them to your phone.
Save GPS data for (days)	Enter the number of days to save GPS data.

Accessing the Remote Delivery Screen

TASK To access the Remote Delivery screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Communications** folder.
- 4 Double-click **Remote Delivery**. The **Remote Delivery** screen opens.

Delivery Folder

You can access the following screens from the Delivery folder:

- » [Delivery Code Screen](#)
- » [Delivery Priority Code Screen](#)
- » [Delivery Zone Screen](#)
- » [Delivery Zone Fees Screen](#)
- » [Address Verification Screen](#)

Delivery Code Screen

To help you in the routing process, the Delivery Code screen allows you to create delivery codes so that you can track deliveries. Delivery codes flag an order as Delivered or Not Delivered. For example, you might set up delivery codes such as Delivered (Delivered), Left on Front Porch (Delivered), Not at Home (Not Delivered), Discharged from Hospital (Not Delivered), etc. You can mark orders Delivered or Not Delivered using these delivery codes in Ticket Search, Order Entry, Point of Sale, or in the Mercury Delivery application.

If you have the Wireless Delivery Confirmation add-on feature, your delivery drivers have these options listed on their phones so that they can mark orders Delivered/Not Delivered while they are on route. If you do not have the Wireless Delivery Confirmation add-on feature, your drivers should mark orders with these codes when they return from the delivery trip.

Figure 24-19: Delivery Code Screen

Delivery Code	Delivery Type
Delivered	Delivered
Left with neighbor	Delivered
Left at front door	Delivered
Not at home	Not Delivered
Not at work	Not Delivered
Discharged from hospital	Not Delivered
Bad address	Not Delivered
In ICU	Not Delivered
Damaged	Not Delivered
Office closed	Not Delivered
Refused	Not Delivered
Other	Not Delivered
	Not Delivered

Wireless Delivery Confirmation and Delivery Codes

If you have Wireless Delivery Confirmation, the delivery codes display on the wireless phone in the same order that they display on this window. Therefore you may want to move the codes up or down by highlighting a code, then clicking the Up or Down button.

You **MUST** at least set up the following five delivery codes if you have Wireless Delivery Confirmation. If you do not set up these exact delivery codes, Wireless Delivery Confirmation may not function:

- » DELIVERED
- » LEFT WITH NEIGHBOR
- » LEFT AT FRONT DOOR
- » IN ICU
- » REFUSED

Accessing the Delivery Code Screen

TASK To access the Delivery Code screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Delivery** folder.
- 4 Double-click **Delivery Code**. The **Delivery Code** screen opens.

Adding Delivery Codes

TASK To add a delivery code:

- 1 In **Mercury Administration**, access the **Delivery Code** screen.
- 2 In the **Description** column, click inside of a blank cell and begin typing.
- 3 In the **Delivery Type** column, select if the delivery code is for orders that are **Delivered** or **Not Delivered**.
- 4 Click **Apply** to save changes before exiting this screen.

Delivery Priority Code Screen

The Delivery Priority Code option allows you to create your own custom delivery codes to use in Order Entry (for example “ASAP” or “BEFORE 1PM”). These codes are used to designate when an order should be delivered in Order Entry and Point of Sale.

Figure 24-20: Delivery Priority Code Screen

Code	Description	Print Field	Priority
RUSH	Rush	Rush Please	1
AM	Morning Delivery	AM Please	2
PM	Afternoon Delivery	PM Please	3
INST	Special Driver Instructions	Instructions	4

Apply
Undo

The Delivery Priority Code screen contains the following settings:

Table 24-19: Delivery Priority Code Screen Columns

Column	Description
Code	<p>Delivery priority codes can be up to for characters in length and must be unique. Ensure that codes are easy to understand; your employees can select these codes in the Time Detail delivery field in Order Entry and Point of Sale.</p> <p>A recommended formatting scheme is A##A, A##P, B##A, and B#P. For example, A9A for After 9 A.M., A12P for After 12 P.M., B10A for Before 10 A.M., B5P for Before 5 P.M., and so on.</p>

Table 24-19: Delivery Priority Code Screen Columns (cont.)

Column	Description
Description	Explain the delivery priority code. This text is for display purposes and does not print on the invoice.
Print Field	This is required if you want to select delivery priority codes in Order Entry and Point of Sale. The text that you enter here displays in the Time Detail list in Order Entry and Point of Sale and prints on the Order Entry invoice. If you do not type text in the Print Field column, the delivery code is not available to select in Order Entry and Point of Sale.
Priority	Assign each code a priority number between 1 and 9, number 1 being the highest priority, and 9 being the lowest priority. If you have the Standard or Advanced Mercury Delivery module, delivery priority codes display in the mapping and routing screens so that you can see the priority of the orders as you are creating delivery routes.

Accessing the Delivery Priority Code Screen

TASK To access the **Delivery Priority Code** screen in **Mercury Administration**:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Delivery** folder.
- 4 Click **Delivery Priority Code**. The **Delivery Priority Code** screen opens.

Adding Delivery Priority Codes

TASK To add a delivery priority code:

- 1 In **Mercury Administration**, access the **Delivery Priority Code** screen.
- 2 Click in the **Code** column of a blank row and enter the new delivery priority code.
- 3 In the **Description** column, enter a description for the delivery priority code.
- 4 In the **Print Field** column, enter text that will display in the Time Detail list in Order Entry and Point of Sale.
- 5 In the **Priority** column, enter the priority for this code.
- 6 Click **Apply** to save your changes before exiting this screen.

Delivery Zone Screen

Delivery zones are used to help you route your deliveries and can be used to automate delivery charges in Order Entry and Point of Sale.

You can define multiple outgoing (wire out) delivery zones. This allows you to assign tax rates and customer charges based on the outgoing zone, which is particularly important if your taxing authority requires taxes be collected based on where goods are delivered.

Figure 24-21: Delivery Zone Screen

Zone Name	Delivery Type	ZIP Code	Active	Print Forms	Charge	Type	Tax Code
N/A	Carry Out	00000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$ 0.00	Postal Code	
Wire Out	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	
Pick Up	Pickup	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	
Local	Local	60515	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 5.00	Postal Code	
Pool	Pool	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	
Test Address	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 5.00	Address	
Test Address	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Address	
Zone1	Local		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 6.95	Map	
Zone2	Local		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 8.95	Address	
	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	

Pool Address Apply Undo Remove Remove All Tax Codes From Products

There are two ways that you can set up delivery zones:

- » If you have the Mercury Delivery application, you can set up delivery zones in that program. Mercury Delivery allows you to set up delivery zones by postal codes, address, or by drawing a boundary on a map. See [Delivery Zones](#) on page 14–7.
- » You can set up delivery zones using this option in Mercury Administration. This is the fastest and easiest way to set up delivery zones and delivery charges. By setting up delivery zones in Mercury Administration, you are assigning delivery zones to postal codes (when a recipient address with a particular postal code is entered in Order Entry or Point of Sale, the associated delivery charge is added to the order automatically). See the steps below to learn how to set up delivery zones this way.

IMPORTANT You cannot delete the N/A, Pickup, or the Wire Out delivery zones. You cannot change the name, delivery type, or zone types for the N/A or Wire Out delivery zones. Additionally, you cannot set the N/A zone as inactive.

For each delivery zone, you can configure the following settings:

Table 24-20: Delivery Zone Screen Settings

Setting	Description
Zone Name	Enter the name for the delivery zone. You cannot change the name of the N/A or Wire Out delivery zones. You change the zone name, delivery type, or zone type for the N/A or Wire Out zones.

Table 24-20: Delivery Zone Screen Settings (cont.)

Setting	Description
Delivery Type	<p>Select the delivery type for this delivery zone. You can select from the following types:</p> <ul style="list-style-type: none"> » Carry Out » Local » Pickup » Wire Out » Pool <p>By default, when you create a new delivery zone, the delivery type is set to Local.</p> <p>You cannot change the delivery type if that delivery zone has been used in a sale. You also cannot change the zone name, delivery type, or zone type for the N/A or Wire Out zones.</p> <p>Only zones with a delivery type of Local are available in Mercury Delivery. Pickup sales are not available for routing in Mercury Delivery.</p>
Zip Code	<p>If this delivery zone is based on a specific ZIP code, enter the ZIP code here. This setting is optional.</p>
Active	<p>Select this check box if you want the delivery zone to display in Order Entry and Point of Sale. Inactive zones display in Mercury Delivery and Mercury Marketing, and are still included in reports. Inactive zones do not appear in Order Entry or Point of Sale. If a zone that was used for a previous order is marked as inactive, the order displays the store default delivery zone.</p> <p>You cannot make the store default zone inactive.</p>
Print Invoice	<p>Select this check box if you want to print an invoice when sending orders to this zone.</p>
Charge	<p>Enter the delivery charge for this zone. If you want to enter delivery charges manually in Order Entry or Point of Sale, or if you want to use the product detail screen and the Delivery Zone Fee screen in Mercury Administration to maintain delivery charges, leave this column blank.</p>
Type	<p>If you do not have the Mercury Delivery module, all delivery zones are saved as Postal Code types. If you have the Mercury Delivery module, this column may contain Address or Map as the type; you cannot change this value in Mercury Administration.</p> <p>You change the zone name, delivery type, or zone type for the N/A or Wire Out zones.</p>

Table 24-20: Delivery Zone Screen Settings (cont.)

Setting	Description
Tax Code	<p>If you want to assign a tax code to this delivery zone (this tax code overrides the store default tax code), select this tax code in the Tax Code column.</p> <p>Product tax codes and customer tax codes override delivery zone tax codes. Therefore the tax code that you associate with the delivery zone is applied only if there is no tax code on the product and the customer is not tax exempt.</p> <p>Tax Hierarchy</p> <p>FTD Mercury determines the correct tax to apply based on the following hierarchy:</p> <ul style="list-style-type: none"> » Customer—If this is a tax-exempt customer, all products and fees for this customer are tax exempt as well. If not, FTD Mercury proceeds to the next level in the hierarchy. » Product—If this is not a tax-exempt customer, FTD Mercury determines if there is a tax code on the product or fee. If there is one, FTD Mercury uses this tax code. If not, FTD Mercury proceeds to the next level in the hierarchy. » Delivery Zone—If the customer is not tax exempt and there is no product tax code, FTD Mercury checks to see if a tax has been set for the delivery zone. If yes, FTD Mercury uses this tax code. Otherwise, it proceeds to the next level in the hierarchy. » Store—If the customer is not tax exempt, if there is no product tax code, and no delivery zone tax code, FTD Mercury applies the default store tax rate to the <p>Because product tax codes override delivery zone tax codes, you must remove the tax codes from your products if you want to utilize delivery zone tax codes in Order Entry and Point of Sale. An easy way to remove tax codes from your product codes is to click the Remove All Tax Codes from Products button. Clicking this button removes all tax codes on your products.</p>

There are two buttons at the bottom of the **Delivery Zone** screen that provide you access to extra functions in the **Delivery Zone** screen: the **Pool Address** button and the **Remove All Tax Codes From Products** button.

The **Pool Address** button opens the **Pool Address** window and allows you to enter the address where pool orders are to be delivered for the currently selected pool zone. You must enter a complete address, including street address, city, state/province, and postal code before you can save the pool address. No address verification is performed on the pool address you enter. You must enter a pool address for each pool zone you create.

NOTE If you attempt to set a zone as a pool zone without specifying a pool address, you are prompted to enter the pool address if you click Apply.

The Remove All Tax Codes From Products button allows you to remove overriding tax codes from all products in your database.

Accessing the Delivery Zone Screen

TASK To access the **Delivery Zone** screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Delivery** folder.
- 4 Double-click **Delivery Zone**. The **Delivery Zone** screen opens.

Setting Up Delivery Zones in Mercury Administration

TASK To set up delivery zones using the **Delivery Zones** screen in Mercury Administration:

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 In a blank row in the grid, click in the **Zone Name** column and type the name of the zone you want to add.
- 3 In the **Delivery Type** column, select the delivery type for the zone.
- 4 If the delivery zone is based on a specific ZIP code, enter it in the **Zip Code** column.
- 5 Ensure the **Active** check box is selected. This makes the delivery zone available in Order Entry and Point of Sale.
- 6 If you want to print an invoice when sending orders to this zone, select the **Print Invoice** check box.
- 7 In the **Charge** column, enter the delivery charge for this zone. If you want to enter delivery charges manually in Order Entry or Point of Sale, or if you want to use the product detail screen and the Delivery Zone Fee screen in Mercury Administration to maintain delivery charges, you can leave this column blank.
- 8 In the **Tax Code** column, you can optionally enter a tax code for this delivery zone. This tax code overrides the store default tax code. See [Delivery Zone Screen](#) on page 24–43 for details.
- 9 Click **Apply** to save the information before exiting this screen.

Creating Pickup Zones

TASK To create a zone for orders that will be picked up from your shop:

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 In a blank row in the grid, click in the **Zone Name** column and type the name of the zone you want to add.
- 3 In the **Delivery Type** column, select Pickup.
- 4 Ensure both the **Active** check box and the **Print Invoice** check box are selected.
- 5 Ensure the **Tax Code** column is blank so your store's default tax code is applied.
- 6 Click **Apply** to save the information before exiting this screen.

Handling Existing Pickup Zones

If you had a zone you used for pickup orders prior to upgrading to FTD Mercury 7.1, you need to mark the existing zone as inactive and then create a new pickup zone with a different name (or use the one that should have been automatically created for you with a Pickup delivery type). Follow the instructions in [Marking Delivery Zones as Inactive](#) on page 24–47 and [Creating Pickup Zones](#) on page 24–47 to mark your existing zone as inactive and create a new pickup zone.

Marking Delivery Zones as Inactive

You can only mark delivery zones as inactive if there are no orders for the current date or future dates that use that zone, unless the order has been cancelled. You cannot mark the store default delivery zone or the N/A zone as inactive. Inactive zones do not appear in Order Entry or Point of Sale, but will still appear in Mercury Delivery, Mercury Marketing, and Mercury Administration. Inactive zones are included on any reports with sales for these zones.

TASK To mark a delivery zone as inactive:

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 In the row containing the delivery zone you want to make inactive, clear the box in the **Active** column.

- 3 Click **Apply** to save your changes before exiting this screen.

If you view previous or cancelled orders that used this delivery zone, order will display the store default zone instead.

Removing Existing Delivery Zones

You cannot remove delivery zones that are used by orders with a delivery date of today or a future date, unless the order has been cancelled. Additionally, you cannot remove a delivery zone that is used in a Standing Order Template. You cannot remove the N/A, Pickup, or Wire Out delivery zones, nor can you remove the store default delivery zone.

TASK To remove an existing delivery zone:

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 Select the delivery zone you want to remove.
- 3 Click **Remove**.
- 4 Click **Apply** to save your changes before exiting this screen.

The delivery zone is removed from the grid and the FTD Mercury database. The zone will no longer be available in Point of Sale, Order Entry, or any other part of FTD Mercury.

Province Map Delivery Zones

NOTE This applies only to Canadian systems which use the Mercury Delivery application.

FTD recommends that you use the provincial map zone utility to create a wire out map zone for each province if you are a Mercury Delivery user. With that in mind, FTD Mercury includes a utility that will create province map zones automatically. This utility creates a new wire out zone for each province within Canada. By default, these zones have no overriding tax codes on delivery charges. You can then create local zones within the province zones for local deliveries.

TASK To use the provincial map zone utility to create province map zones:

- 1 Close Mercury Administration and FTD Mercury.
- 2 Click the **Windows Start** menu, point to **All Programs**, point to **Accessories**, and click **Windows Explorer**.
- 3 Navigate to the C: \Wi ngs\Support\Uti l i t i e s directory and double-click CreateCanadianMapZones. exe.
- 4 At the prompt asking if you want to create the zones, click **Yes**.
- 5 When the utility finishes creating the map zones, click **OK**.

After using this utility, be sure to assign the correct tax to each provincial zone created.

For more details, see [Canadian Configurations](#) on page C-1, and specifically [Create Provincial Delivery Zones for Outgoing Orders](#) on page C-10.

Pool Delivery Zones

Delivery pools, common in larger metropolitan areas, allow multiple flower shops within a community to share delivery resources. High-volume florists often participate in delivery pools so they can expand their delivery area. Billing for delivery pools is typically handled by tracking orders on a form called a pool ticket.

FTD Mercury allows you to designate pool delivery zones, including specifying the address. When an order invoice is printed, it clearly states it is for a POOL delivery zone type. If you use Mercury Delivery, when you print the route manifest, the address for the delivery pool is used to route the orders.

NOTE Contact FTD Technology Sales either at 1-800-767-3222 or by emailing TechSales@FTDi.com if you want to explore having customized pool tickets created for FTD Mercury.

Configuring Pool Zones

You configure pool zones from the **Delivery Zone** screen in FTD Mercury or from **Mercury Delivery**. If you have **Mercury Delivery**, you should perform your configurations there. When you set a zone as a pool zone, you need to provide the pool address. This will be used as the address when routing orders for the pool.

Creating a Pool Zone in Mercury Administration

TASK To create a pool delivery zone in Mercury Administration:

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 If you have not done so already, create a zone for a delivery pool, and set the **Delivery Type** as **Pool**.
- 3 With the delivery zone selected, click **Pool Address**. The **Pool Address** window opens.
- 4 Enter the address where pool orders are to be delivered for this zone. You must enter a complete address, including street address, city, state/province, and postal code before you can save the pool address. No address verification is performed on the pool address you enter.
- 5 Click **Save**.
- 6 Click **Apply** to save the delivery zone changes.

Configuring a Pool Zone in Mercury Delivery

TASK To create a pool zone in Mercury Delivery:

- 1 On the **FTD Mercury Main Menu**, click **Delivery**. The **Delivery Snapshot** window opens.
- 2 Click **Zones**. The **Create Zone** window opens.
- 3 Click **Create Zone**.
- 4 Enter the information about the zone, setting the **Delivery Type** to **Pool**.
- 5 Click the **Pool Address** tab and enter the pool address.
- 6 Click **Save**.

Pool Address Window

You can access the **Pool Address** window by clicking **Pool Address** in the **Delivery Zone** screen in **Mercury Administration**. This window allows you to enter an address for a delivery pool (where pool orders are to be delivered for the selected zone).

You must enter a complete address, including street address, city, state/province, and postal code before you can save the pool address. No address verification is performed on the pool address you enter.

When you have finished entering the address for the pool, click **Save**.

Delivery Zone Fees Screen

The Delivery Zone Fees screen allows you to assess additional fees when you select delivery zones in Order Entry or Point of Sale. Fees are added to the system as a product with a “fee” category. For example, when you select a wire out zone, you may automatically want to assess a relay and/or retrans fee. For the Delivery Charge column, this screen does not apply if you use the Mercury Delivery module or if you assign delivery fees to your delivery zones in the Delivery Zone option in Mercury Administration (see [Delivery Zone Screen](#) on page 24–43).

Before using this screen, you must do the following:

- » Create names for your delivery zones using the Delivery Zones screen in Mercury Administration. See [Delivery Zone Screen](#) on page 24-43.
- » Create product codes that may be applied as delivery zone fees. See [Product Codes](#) on page 8-1.

Figure 24-22: Delivery Zone Fees Screen

	Relay Fee	Retrans Fee	Delivery Charge
N/A	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Wire Out	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pick Up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Local	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Pool	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Test Address Zone	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Test Address2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Zone1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Zone2	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Accessing the Delivery Zone Fees Screen

TASK To access the **Delivery Zone Fees** screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Delivery** folder.
- 4 Double-click **Delivery Zone Fees**. The **Delivery Zone Fees** screen opens.

Assigning Fees to Delivery Zones

TASK To assign a fee to a delivery zone:

- 1 In **Mercury Administration**, access the **Delivery Zone Fees** screen.
- 2 Select the correct check box category or categories for which you want to assign a delivery fee.
- 3 Click **Apply** to save the information before exiting this screen.

Removing Fees from Delivery Zones

TASK To remove a fee from a delivery zone:

- 1 In **Mercury Administration**, access the **Delivery Zone Fees** screen.
- 2 Clear the check box next to the category or categories for which you want to remove the fee.

- 3 Click **Apply** to save the information before exiting this screen.

Address Verification Screen

Address verification is available only to customers with the Advanced Mercury Delivery module. The Address Verification screen holds the location of your address verification data and your password information. This information is updated for you automatically when your system is licensed for the Advanced Mercury Delivery module. Please do not change any of the information in this screen unless you are instructed to do so by the Mercury Technology Assistance Center.

Figure 24-23: Address Verification Screen

Address Verification Information

Dataset Path: C:\Program Files\Centrus\Datasets\

License Password: xxxxxxxx

Confirm Password: xxxxxxxx

Apply Undo

Accessing the Address Verification Screen

TASK To access the Address Verification screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Delivery** folder.
- 4 Double-click **Address Verification**. The **Address Verification** screen opens.

The Database Path field displays the location on your computer where the address verification data is stored. The License Password and Confirm Password fields contain your address verification account password.

Employee Folder

You can access the following screens from the Employee folder:

- » [Employees Screen](#)
- » [Employee Type Screen](#)
- » [Job Functions Screen](#)

Employees Screen

The Employees screen allows you to add new employee information, change information, or delete employees from your system. You may also reactivate terminated employees from this window. For more information on these tasks, see [Managing Employees](#) on page 6-1.

NOTE Employees have equal rights in all stores. When you set up an employee in Mercury Administration, that employee's security settings apply at all locations.

Figure 24-24: Employees Screen

The screenshot shows a web-based form for adding or editing an employee. The form is organized into several sections:

- Name:** Administrator
- Employee ID:** (empty field)
- Address Information:**
 - Home (dropdown menu)
 - Primary Address (checked checkbox)
- Phone Information:**
 - Cell Phone (dropdown menu)
 - Primary Phone (checked checkbox)
- Authentication:**
 - Allow this Employee Online (checked checkbox)
 - Login Name: admin
 - Language: English (dropdown menu)
 - Password: (masked with asterisks)
 - Confirm: (masked with asterisks)
- Personal Information:**
 - Active Status (checked checkbox)
 - Social Security No.: (empty field)
 - Employee Type: Full Time (dropdown menu)
 - Job Category: Admin (dropdown menu)
- Notes:** (empty text area)

At the bottom of the form are three buttons: **Apply**, **Terminate...**, and **Undo**.

Employee Details

Although you can access the list of all employees in the system, as well as create a new employee from the Employees screen, information about individual employees is entered through Employee Details, which are displayed when you double-click an employee in the Employees screen.

Table 24-21: Employee Detail Settings

Setting	Description
Name	Enter the employee name. You can use any format you want, but a best practice is to be consistent. The way the name is entered is the way it displays as the operator on Mercury messages.
Employee ID	Enter the employee ID for this employee. This can be any format, but again, you should attempt to be consistent.
Address Type	Select an address type and enter the address in the address field. You can have more than one address on record (Home, School, etc.).
Address	Enter the address for the selected address type. If you did not format the address correctly, the Address Check window appears to confirm the employee's address. Addresses should be entered in the following format: 123 Main Street Apt. 560 Downers Grove, IL 60515
Primary Address	Select the address type that you want to make the main contact address and select this check box. This way, you know what the primary address is for an employee with multiple addresses.

Table 24-21: Employee Detail Settings (cont.)

Setting	Description
Phone Type	Select a phone type and enter the phone number in the phone number field. You can have more than one phone number on record (home, cell, etc.).
Phone Number	Enter the phone number for the selected phone type.
Primary Phone	Select the phone type that you want to make the main number at which this employee can be contacted and select this check box.
Active Status	Select this check box if the employee is currently working in your store. You may want to activate and deactivate this for your seasonal employees. Employees who are not active cannot log in to FTD Mercury and do not appear in Get All Employee searches.
Social Security No.	Enter the employee's Social Security number in this field (with or without the dashes). This is not a required field.
Employee Type	Click the arrow and select the employee type from the list.
Job Category	Click the arrow and select the job category from the list.
Allow this Employee Online	If the employee has permission to log in to FTD Mercury, select this option.
Login Name	Enter a login name for the employee to use. This is the name the employee uses to log in to FTD Mercury.
Language	Click the arrow to select the language the employee speaks. When the employee logs in, the program displays in that language.
Password	Enter the password for the employee. The password will be protected by asterisks (*****).
Confirm	Confirm the employee's password. The password will be protected by asterisks (*****).
Notes	Enter any notes for this employee (such as hours the employee is available to work).

Accessing the Employees Screen

TASK To access the Employees screen in Mercury Administration:

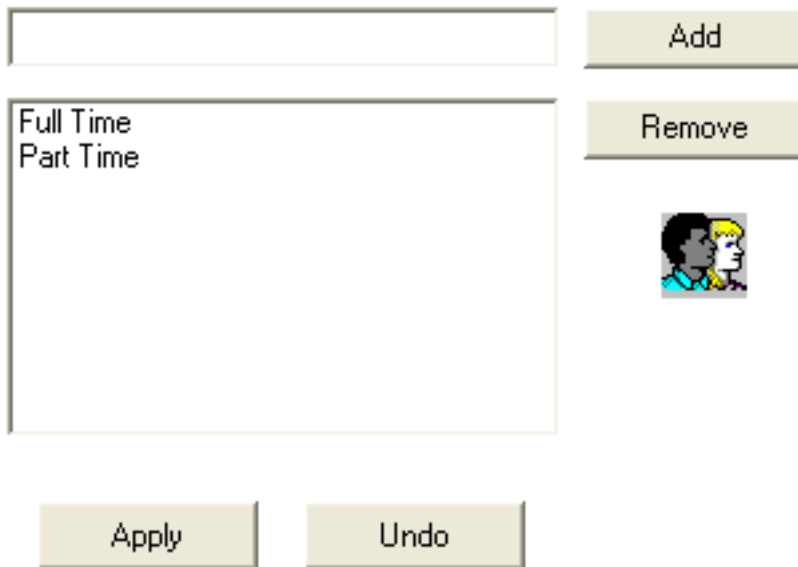
- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Employee** folder.
- 4 Double-click **Employees**. The **Employees** screen opens.
- 5 Double-click on an employee to view specific information about that employee.

Employee Type Screen

Employee types are used when entering a new employee to FTD Mercury. By default, FTD Mercury includes two employee types: Full Time and Part Time.

To learn how to add new employee types, see [Adding Employees](#) on page 6-1.

Figure 24-25: Employee Type Screen



Accessing the Employee Type Screen

TASK To access the **Employee Type** screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Employee** folder.
- 4 Double-click **Employee Type**. The **Employee Type** screen opens.

Job Functions Screen

Job functions are used to determine the level of access your employees have in the system. For example, you may want your “Manager” employee job function to access all levels of the program, but you want your “Clerk” to access only the Order Entry and search functions. See [Adding Job Functions](#) on page 6-6 for details on adding job functions. (To learn how to change employee access level, refer to [Window Access Screen](#) on page 24-57 after adding any job functions.)

NOTE A job function cannot be removed if any employee is labeled with that type.

Figure 24-26: Job Functions Screen

Name: <input type="text" value="Jerome"/>		Employee ID: <input type="text" value="1234"/>	
Address Information <input type="text" value="Home"/> <input type="text" value="3113 Woodcreek Dr.
DOWNERS GROVE, IL 60515"/> <input checked="" type="checkbox"/> Primary Address		<input checked="" type="checkbox"/> Allow this Employee Online Login Name: <input type="text" value="jay"/> Language: <input type="text" value="English"/>	
Phone Information <input type="text" value="Cell Phone"/> <input type="text" value="123-45-6788"/> <input checked="" type="checkbox"/> Primary Phone		Password: <input type="text" value="xxxx"/> Confirm: <input type="text" value="xxxx"/>	
<input checked="" type="checkbox"/> Active Status Social Security No: <input type="text" value="123456789"/> Employee Type: <input type="text" value="Full Time"/> Job Category: <input type="text" value="Admin"/>		Notes	

Accessing the Job Functions Screen

TASK To access the Job Functions screen in Mercury Administration:

- 1 Launch Mercury Administration.
- 2 Double-click Mercury Administration in the explorer pane.
- 3 Double-click the Employee folder.
- 4 Double-click Job Functions. The Job Functions screen opens.

Security Folder

You can access the following screens from the Security folder:

- » [License Screen](#)
- » [Window Access Screen](#)

License Screen

The License screen displays the modules that currently are installed on your system and allows you to add modules as you purchase them. Use this option with the Mercury Technology Assistance Center to enter key codes to make the modules active on your system. If you purchase additional software for FTD Mercury, in most cases FTD can send you a GEN message and update the information in this screen for you automatically.

The More Information button gives you additional information on any of the modules listed. To get a brief description of a module, highlight that module in the list and then click the More Information button.

If you have a question regarding FTD Mercury licensing or want to purchase a new license for your system, call the Mercury Technology Assistance Center at 1-888-309-2244.

Figure 24-27: License Screen

To obtain license keys, please call support at 1-888-309-2244.

Module Name	Option Value	Validity
User License	10	Valid
Direct	1	Valid
SBE	1	Valid
Billing	1	Valid
Credit Card	1	Valid
Debit Card	0	Deactivated
Order Entry	1	Valid
POS	1	Valid
TEL Dir	0	Deactivated
Wireless Delivery Confirma	0	Deactivated
Address Verification	1	Valid
Standard Delivery	1	Valid
Advanced Delivery	0	Deactivated
GPS	0	Deactivated
Marketing	1	Valid
Web Orders	0	Deactivated
Accounting	1	Valid
Pool Ticket	1	Valid
ETD Dir	1	Valid

Accessing the License Screen

TASK To access the License screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Security** folder.
- 4 Double-click **License**. The **License** screen opens.

Adding Licenses

TASK To add a license:

- 1 In Mercury Administration, access the **License** screen.
- 2 Click **Add** to open the **Add License** window.
- 3 Your store name is listed by default in the **Shop Code** list. If you have multiple stores, click the arrow to select the name of the store for which you want to add licensing information.
- 4 In the **Module** list, click the arrow and choose the name of the module you wish to add.
- 5 Enter the **Key** and **Value** information, supplied to you from FTD, in their appropriate fields.

- Click **Save** in the **Add License** window.

Window Access Screen

Initially, your system is set to grant full access to all windows for all employees. However, you may wish to limit the level of access per job function. For example, you may prefer that your clerks not have access to employees' personal information. To learn how to restrict access, see [Setting Window Access for Employees](#) on page 6–8. When employees try to access a window they are not permitted to, they receive a message stating You are not authorized to use this function.

IMPORTANT This window restricts access according to employee job function so you can, for example, give your manager and your designer different levels of access. To ensure this feature can function, you must assign your employees job functions in the Employee window.

Figure 24-28: Window Access Screen

	Clerk	Owner	
Florist Search	Full access	Full access	Full
Status	Full access	Full access	Full
Mercury Order Message	Full access	Full access	Full
Mercury Message	Full access	Full access	Full
Terminate Employee	Full access	Full access	Full
Related Message	Full access	Full access	Full
FTD Directory	Full access	Full access	Full
REC Message List	Full access	Full access	Full
VNS Directory	Full access	Full access	Full
Auto Reconciliation History	Full access	Full access	Full
Cancel or Void Order	Full access	No access	No
Retrieval Message (RET)	Full access	Full access	Full
Credit Card Message (CRD)	Full access	Full access	Full
Adjustment Message (ADJ)	Full access	Full access	Full
Credit Card Authorization	Full access	Full access	Full
Credit Card Settlement	Full access	Full access	Full
Unsettled Credit Card Authorizations	Full access	Full access	Full
View Settlement Totals	Full access	Full access	Full

Accessing the Window Access Screen

TASK To access the **Window Access** screen in **Mercury Administration**:

- Launch **Mercury Administration**.
- Double-click **Mercury Administration** in the explorer pane.
- Double-click the **Security** folder.
- Double-click **Window Access**. The **Window Access** screen opens.

Store Folder

You can access the following screens from the Store folder:

- » [General Screen](#)
- » [Wire Code Screen](#)
- » [Store Settings Screen](#)

General Screen

The General screen allows you to configure the country for the system, specify reciprocity handling, designate if you are a multi-store, specify your main wire service code, and specify the number of months to hold data before purging it.

Figure 24-29: General Screen

The screenshot shows a configuration interface with several sections:

- Country:** Radio buttons for US and Canada.
- How should reciprocity be handled?** Radio buttons for By \$ amount and By count.
- Are you registered with Mercury as a multi-store?** Radio buttons for Yes and No.
- Default Outgoing Message Processing** Radio buttons for Auto Forward and No Auto Forwarding.
- Main Wire Code:** A dropdown menu showing "90-9085JW".
- Automatic Data Purge:** A section containing "Months to Hold:" followed by a spinner control set to "255".

At the bottom of the screen are two buttons: "Apply" and "Undo".

Each of these settings are explained below:

Table 24-22: General Screen Settings

Setting	Description
Country	<p>Select whether this system is a U.S. or Canadian system. This setting should already be correct; during installation, this value was set. All stores on the system must be defined as the same country.</p> <p>IMPORTANT: If you change this value, you will receive a warning that changing the country will reconfigure your system and apply country-specific accounting and taxation rules. You will then need to close all FTD Mercury applications (including Mercury Administration) and restart them before continuing.</p>
How should reciprocity be handled?	<p>Select the way you want FTD Mercury to handle reciprocity. You can select from the following options:</p> <ul style="list-style-type: none"> » By \$ amount—Reciprocity will be based on dollar amount. » By count—Reciprocity will be based on order count.
Are you registered with Mercury as a multi-store?	If you are registered as a multi-store, click Yes. Otherwise, click No.
Main Wire Code	From the list of available wire codes, select your main FTD shop code.
Default Outgoing Message Processing	Select whether you want, by default, outgoing messages to be set to disallow auto forwarding. It is a best practice to allow auto forwarding.
Automatic Data Purge	<p>Select the number of months that FTD Mercury will retain data before it is automatically purged. The default number of months is 255 (21 years, 3 months). You can set this value to a number between 3 and 255. Either highlight the existing number and replace it with a new number, or click the up or down arrows next to the number to change the value.</p> <p>The automatic data purge takes place on the first Sunday of the month at 4 A.M. The following are deleted:</p> <ul style="list-style-type: none"> » Statements » Wire service reconciliation batches » POS sessions and the transactions within the sessions » Mercury Messages (Pending messages are not deleted) » Sales (only completed or cancelled sales) » Credit card transactions » Credit card settlements » GL export batches <p>Recipient information and reciprocity totals are not deleted.</p>

Accessing the General Screen

TASK To access the General screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Store** folder.
- 4 Double-click **General**. The **General** screen opens.

Configuring General Settings

TASK To configure general settings:

- 1 In **Mercury Administration**, access the **General** screen.
- 2 Change settings as necessary. See [General Screen](#) on page 24-58 for details on these settings.
- 3 Click **Apply** to save the information before exiting this screen.

Wire Code Screen

The Wire Code option allows you to add or remove wire codes for stores configured in your system.

Figure 24-30: Wire Code Screen

Store Name: Margie's Flowers

FTD | TEL | AFS | BLM | VNS

Default Code: 90-9085J/w

Wire Codes: 90-9085J/w

Add Code...

Remove Code

Set Default

Apply Undo

Accessing the Wire Code Screen

TASK To access the Wire Code screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Store** folder.
- 4 Double-click **Wire Code**. The **Wire Code** screen opens.

Adding Wire Codes

TASK To add a wire code:

- 1 In **Mercury Administration**, access the **Wire Code** screen.
- 2 From the **Store Name** list, select the name of the store to which you want to add the wire service code.
- 3 For each wire service tab, the default code displays. Click **Add Code**, enter the new code, and click **Save**.
- 4 Click **Apply** to save the information before exiting this screen.

Removing Wire Codes

TASK To remove a wire code:

- 1 In **Mercury Administration**, access the **Wire Code** screen.
- 2 From the **Store Name** list, select the name of the store from which you want to remove the wire service code.
- 3 For each wire service tab, the default code displays. To remove a code, select it from the **Wire Codes** text box and click **Remove Code**.

NOTE A default shop code cannot be removed. If the default shop code must be removed, add a new code and set it as the default code, then remove the old default code.

- 4 Click **Apply** to save the information before exiting this screen.

Setting Your Default Shop Code

TASK To set your default shop code:

- 1 In **Mercury Administration**, access the **Wire Code** screen.
- 2 In the **Store Name** list, select the store for which you are setting the default shop code.
- 3 Select the tab with the name of the wire service for which you are setting the default shop code.
- 4 Select the correct default code in the lower text box and click **Set Default**.
- 5 Repeat for the remaining wire service tabs.
- 6 Click **Apply** to save the information before exiting this screen.

Store Settings Screen

The Store Settings screen allows you to set default tax codes, delivery zones and card fonts for your stores.

Figure 24-31: Store Settings Screen

This screen includes the following settings:

Table 24-23: Store Settings Screen Settings

Setting	Description
Store	The name of the store for which these settings apply.
Address	Contains the address of the selected store.
Province	This list, available only when you are configured as a Canadian shop, sets the taxation method for the store. Depending on the province where the store is located, where the order originated from, and where the order is to be delivered, different tax rates will be applied.
Default Tax Code	Select the tax code you want to use as the default in Order Entry and Point of Sale. This should be the tax code you will charge the majority of your customers, and usually corresponds to your state or provincial tax.

Table 24-23: Store Settings Screen Settings (cont.)

Setting	Description
Default Delivery	Select the delivery zone you use most often, which will be used as the default delivery zone for orders. This is optional; you can set this to blank.
GST ID#	This field, available only when you are configured as a Canadian shop, allows you to input your GST ID number. When this field is populated, FTD Mercury prints this number on Point of Sale receipts, Order Entry invoices, and customer statements, directly below your store address. NOTE: You can use only letters, numbers, spaces, hyphens, and ampersands (&) in this field, and are limited to 30 characters.
US Exchange Rate	This field, available only when you are configured as a Canadian shop, is used to calculate the conversion of U.S. funds to Canadian funds on non-wire transactions in Order Entry and Point of Sale. By default, the exchange rate for FTD is 1.200000, meaning for every \$1.00US, funds are converted to \$1.20CDN. This local exchange rate is used in Point of Sale when tendering sales and receiving payment in U.S. dollars, and in the Money Counter for entering cheques/other currency if in U.S. dollars.
Guarantee	This field displays the guarantee message that prints at the bottom of the Order Entry invoice. You can erase the existing text and type your own text here. If you need to reset the text, click Restore Default Guarantee.

Accessing the Store Settings Screen

TASK To access the Store Settings screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Store** folder.
- 4 Double-click **Store Settings**. The **Store Settings** screen opens.

Changing the Store Name

TASK To edit store information (such as the store name, default tax code, or default delivery zone):

- 1 In **Mercury Administration**, access the **Store Settings** screen.
- 2 In the **Store** area, select the store you want to change the name for and click **Edit**.
- 3 Enter the new name for the store.
- 4 Click **Save**.
- 5 Click **Apply** to save the information before exiting this screen.

Changing the Store Address

TASK To change the store address:

- 1 In **Mercury Administration**, access the **Store Settings** screen.
- 2 In the address box, change the address.
- 3 If you are a Canadian shop, from the **Province** list, ensure the province is correct.
- 4 Click **Apply** to save your changes before exiting this screen.

Adding Stores

If you are configured as a multi-store shop in FTD Mercury, you can add new stores from the Store Settings screen.

TASK **To add a store:**

- 1 In **Mercury Administration**, access the **Store Settings** screen.
- 2 In the **Store** area, click **Add**. The **Add Store** window opens.
- 3 In the **Store Name** field, type the store name exactly as you want it to appear on statements. This field is limited to 50 characters. Click **Save**.
- 4 In the store address box, enter your store address.
- 5 If you are a Canadian shop, from the **Province** list, select the province where this store is located.
- 6 From the **Default Tax Code** list, select the default tax code for the store.
- 7 From the **Default Delivery** list, select the default delivery zone for the store (if desired; otherwise, select **N/A**).
- 8 If you are a Canadian shop:
 - a. In the **GST ID#** field, enter your GST ID number.
 - b. In the **US Exchange Rate** field, enter the exchange rate for U.S. dollars to Canadian dollars. This is used for local currency exchanges and not for wire orders.
- 9 Click **Save**.
- 10 Click **Apply** to save the information before exiting this screen.

Setting the Default Tax Code

TASK **To set your store's default tax code in Mercury Administration:**

- 1 In **Mercury Administration**, access the **Store Settings** screen.
- 2 From the **Default Tax Code** list, select the tax code you want to use as the default.
- 3 Click **Apply** to save changes before exiting this screen.

Setting the Default Delivery Zone

TASK **To set your default delivery zone in Mercury Administration:**

- 1 In **Mercury Administration**, access the **Store Settings** screen.
- 2 From the **Default Delivery** list, select the delivery zone you expect to use most often. If you do not want to have a default delivery zone, select **N/A**.
- 3 Click **Apply** to save changes before exiting this screen.

Setting the GST ID Number

IMPORTANT This procedure applies only to Canadian stores.

TASK **To set the GST ID number used by FTD Mercury:**

- 1 In **Mercury Administration**, access the **Store Settings** screen.
- 2 In the **GST ID#** field, enter the new GST ID number.
- 3 Click **Apply** to save changes before exiting this screen.

Changing the U.S. Exchange Rate

IMPORTANT This only applies to Canadian stores.

TASK To change the U.S. exchange rate:

- 1 In **Mercury Administration**, access the **Store Settings** screen.
- 2 In the **Store** area, select the store for which you are modifying the exchange rate.
- 3 In the **US Exchange Rate** field, enter the exchange rate you want to use.
- 4 Click **Apply** to save changes before exiting this screen.

Changing the Default Card Font

TASK To change the default card font and/or font size in Mercury Administration:

- 1 In **Mercury Administration**, access the **Store Settings** screen.
- 2 Click **Change Card Font**. The **Font** window opens.
- 3 From the **Font** list, select the font you want to use as the default.
- 4 From the **Size** list, select the font size you want to use as the default.

IMPORTANT Although the Marlett, Webdings, and Wingdings fonts appear in your font list, they are not valid fonts in FTD Mercury. FTD Mercury only recognizes changes that you make to the font and size (you cannot change fonts to be italic or bold for example).

- 5 Click **OK**.
- 6 Click **Apply** to save your changes before exiting this screen.

System Folder

You can access the following screens from the System folder:

- » [Abbreviation Codes Screen](#)
- » [Address Types Screen](#)
- » [Reason Code Screen](#)
- » [Product Category Screen](#)
- » [Referral Codes Screen](#)
- » [Phone Types Screen](#)
- » [Paid Out/In Types Screen](#)
- » [Advanced Settings Screen](#)

Abbreviation Codes Screen

Abbreviation codes (sometimes referenda to as send to codes) are shortcuts for entering information into recipient card messages or addresses in orders.

Figure 24-32: Abbreviation Codes Screen

For example, you may want to use a code that, when entered into the recipient card message, automatically enters **Happy Birthday!** You could create an abbreviation code called hb for this message. Instead of typing **Happy Birthday!**, you would only need to enter \hb and FTD Mercury would automatically replace \hb with **Happy Birthday!** Additionally, you can enter address information into an abbreviation code that will automatically fill in the recipient address (such as for a hospital, funeral home, or other common delivery location).

The Abbreviation Codes screen consists of the following fields:

Table 24-24: Abbreviation Code Screen Fields

Field	Description
Code	The 1 to 5 character code. When you enter the code preceded by a backslash, the value will be filled into the appropriate fields in Order Entry or Point of Sale.
Company	The company name for the recipient.
Address	The street address for the recipient.
City	The recipient's city.
State	The recipient's state.
ZIP Code	The recipient's ZIP/postal code.
Phone	The recipient's phone number.
Card Message	The card message to insert when you use this abbreviation code. You can enter up to 200 characters (including spaces and returns).
Occasion	The occasion associated with this abbreviation code. When you use this code in Order Entry or Point of Sale, the Occasion drop-down list will automatically be selected using this value.

If you associate values for both the recipient address and card message with an abbreviation code, if you enter the abbreviation code in any of the recipient address fields in Order Entry or Point of Sale, both the address and card message will be populated. If there is only a card message, you can only use the code in the Card Message field; likewise, if there is only an address, you can only enter it in a recipient address field.

Predefined Abbreviation Codes

The following abbreviation codes (all for card messages) are already set up for you in your system:

Table 24-25: Predefined Abbreviation Codes

Abbreviation Code	What It Represents
GWS	Get Well Soon
HA	Happy Anniversary
HB	Happy Birthday
HE	Happy Easter
HFD	Happy Father's Day
HH	Happy Holidays
HMD	Happy Mother's Day
HSW	Happy Secretary's Week
HT	Happy Thanksgiving
HVD	Happy Valentine's Day
ILM	In Loving Memory
ILY	I Love You
JB	Just Because
L	Love
MC	Merry Christmas
TOY	Thinking of You
WDS	With Deepest Sympathy
WL	With Love
WLS	With Love and Sympathy
WLY	We Love You
WML	With All My Love
WOS	With Our Sympathy

Using Abbreviation Codes

You can use abbreviation codes to automatically enter recipient or card message information in Order Entry or Point of Sale. When entering an abbreviation code for a card message, enter `\code`, (where code is replaced by the abbreviation code) in the Card Message field. FTD Mercury automatically enters the card message in the field as defined in Mercury Administration. If the abbreviation code is for a recipient address, enter `\code` in any of the Recipient Address fields and the information from Mercury Administration will automatically be filled in. If your code has a card message and a recipient address, you can use the code in the Recipient Address fields and the card message will automatically be filled in as well. If you have specified an Occasion for the abbreviation code, the Occasion will automatically be selected once you enter the abbreviation code.

NOTE

For card messages, FTD Mercury will automatically adjust the formatting of the abbreviation code text if the font and/or font size necessitate it.

TIP If text exists in the **Card Message** field or the **Recipient Address** field and you use an abbreviation code, the value of the abbreviation code is inserted after the existing text. You can use more than one abbreviation code in the **Card Message** field.

Accessing the Abbreviation Codes Screen

TASK To access the **Abbreviation Codes** screen in **Mercury Administration**:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **System** folder.
- 4 Double-click **Abbreviation Codes**. The **Abbreviation Codes** screen opens.

Adding Abbreviation Codes

Adding an Abbreviation Code for a Card Message

TASK To add an abbreviation code for a card message:

- 1 In **Mercury Administration**, access the **Abbreviation Codes** screen.
- 2 In the **Code** field, enter in the new code.
- 3 In the **Card Message** field, enter the text you want to replace the code when you use the code.
- 4 If desired, from the **Occasion** list, select the occasion to associate with this abbreviation code.
- 5 Click **Add**.
- 6 Click **Apply** to save the changes before exiting this screen.

Adding an Abbreviation Code for a Recipient Address

TASK To add an abbreviation code to use for a recipient address:

- 1 In **Mercury Administration**, access the **Abbreviation Codes** screen.
- 2 In the **Code** field, enter in the new code.
- 3 If there is a company you want to associate with the code, enter it in the **Company** field.
- 4 In the **Address** field, enter the street address for the code.
- 5 In the **City** field, enter the city.
- 6 From the **State** list, select the state.
- 7 In the **ZIP Code** field, enter the ZIP/postal code.
- 8 If there is a phone number for the abbreviation code, enter it in the **Phone** field.
- 9 If desired, from the **Occasion** list, select the occasion to associate with this abbreviation code.
- 10 Click **Add**.
- 11 Click **Apply** to save the changes before exiting this screen.

Adding an Abbreviation Code for Both an Address and Card Message

TASK To add an abbreviation code to insert both a recipient address and a card message:

- 1 In **Mercury Administration**, access the **Abbreviation Codes** screen.
- 2 In the **Code** field, enter in the new code.
- 3 If there is a company you want to associate with the code, enter it in the **Company** field.
- 4 In the **Address** field, enter the street address for the code.
- 5 In the **City** field, enter the city.
- 6 From the **State** list, select the state.
- 7 In the **ZIP Code** field, enter the ZIP/postal code.

- 8 If there is a phone number for the abbreviation code, enter it in the **Phone** field.
- 9 In the **Card Message** field, enter the text you want to replace the code when you use the code.
- 10 If desired, from the **Occasion** list, select the occasion to associate with this abbreviation code.
- 11 Click **Add**.
- 12 Click **Apply** to save the changes before exiting this screen.

Modifying Existing Abbreviation Codes

TASK To edit an existing abbreviation code:

- 1 In **Mercury Administration**, access the **Abbreviation Codes** screen.
- 2 From the list of existing abbreviation codes, select the abbreviation code you want to modify.
- 3 Change the information for the abbreviation code as necessary.
- 4 Click **Update**.
- 5 Click **Apply** to save your changes exiting this screen.

Removing Abbreviation Codes

TASK To remove abbreviation codes from FTD Mercury:

- 1 In **Mercury Administration**, access the **Abbreviation Codes** screen.
- 2 From the list of existing abbreviation codes, select the code you want to remove.
- 3 Click **Remove**.
- 4 Click **Apply** to save the changes before exiting this screen.

Address Types Screen

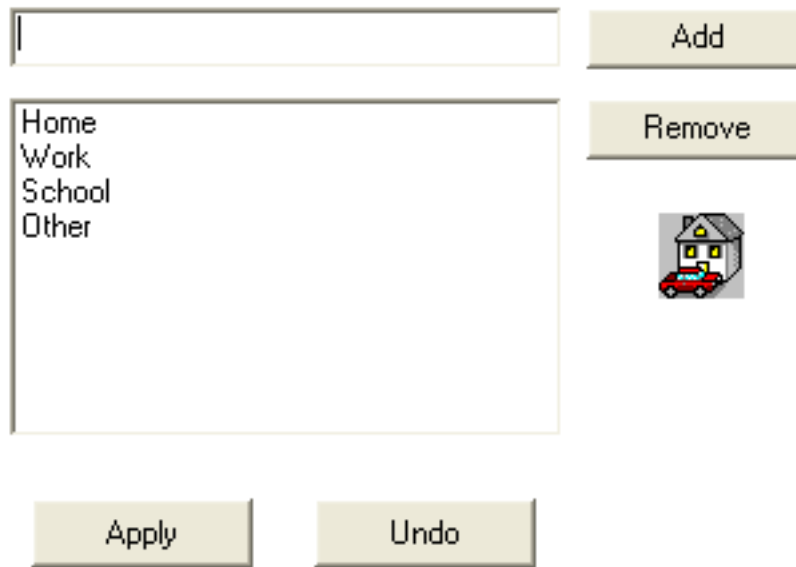
Address types allow you to save multiple addresses for employees and customers as you add them to the system. The following procedure teaches you how to add and remove address types.

The following address types are already set up for you in your system:

- » Home
- » School
- » Work
- » Other

NOTE An address type cannot be removed if a customer or employee has an address stored in your system with that type.

Figure 24-33: Address Types Screen



Accessing the Address Types Screen

- TASK** To access the Address Types screen in Mercury Administration:
- 1 Launch **Mercury Administration**.
 - 2 Double-click **Mercury Administration** in the explorer pane.
 - 3 Double-click the **System** folder.
 - 4 Double-click **Address Types**. The **Address Types** screen opens.

Adding an Address Type

- TASK** To add an address type:
- 1 In **Mercury Administration**, access the **Address Types** screen.
 - 2 In the upper text box, enter the address type.
 - 3 Click **Add**.
 - 4 Click **Apply** to save your changes before exiting this screen.

Removing Existing Address Types

- TASK** To remove an address type:
- 1 In **Mercury Administration**, access the **Address Types** screen.
 - 2 From the list of existing address types, select the address type you want to remove.
 - 3 Click **Remove**.
 - 4 Click **Apply** to save your changes before exiting this screen.

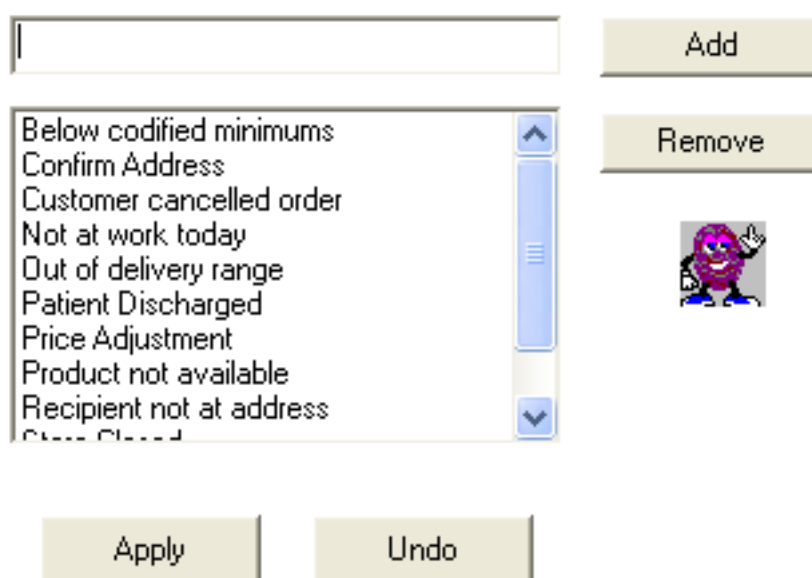
Reason Code Screen

Reason codes are used when explaining why a message is being sent—for example, why you are sending a cancellation (CAN) message to cancel an order. A list of common reason codes has been set up for you, including the following:

- » Below codified minimums
- » Confirm Address

- » Customer cancelled order
- » Not at work today
- » Out of delivery range
- » Patient Discharged
- » Price Adjustment
- » Product not available
- » Recipient not at address
- » Store Closed
- » Too late for delivery

Figure 24-34: Reason Code Screen



Accessing the Reason Code Screen

TASK To access the Reason Code screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **System** folder.
- 4 Double-click **Reason Code**. The **Reason Code** screen opens.

Adding Reason Codes

TASK To add a reason code:

- 1 In **Mercury Administration**, access the **Reason Code** screen.
- 2 In the text box, enter the new reason code.
- 3 Click **Add**.
- 4 Click **Apply** to save the information before exiting this screen.

Removing Reason Codes

TASK **To remove a reason code:**

- 1 In **Mercury Administration**, access the **Reason Code** screen.
- 2 From the list of existing reason codes, select the reason code you want to remove.
- 3 Click **Remove**.
- 4 Click **Apply** to save the information before exiting this screen.

Product Category Screen

Product categories are used as a tool to help you track what types of items are being sold in your store. They “categorize” your products (for example, “Cards,” “Containers,” “Perishables,” etc.) so that you can evaluate what types of products are being sold and how. For example, many reports are sorted by product category, such as the Product Comparison Report, Product Sales Report, Business Snapshot Report, and Employee Analysis Report.

Product Categories are also important if you use the Accounting module (General Ledger with QuickBooks). When you export data from FTD Mercury to QuickBooks, product sales are exported to QuickBooks by product category. For example, all sales from your products with the “Perishables” product category are exported to the “Perishables” income account in QuickBooks.

By default all of the FTD Selection Guide products are assigned the product category Other. You may want to assign these products different product categories, or create one or more product categories to assign to the Selection Guide products. Note that each time you update the directory, you are adding new Selection Guide products. Therefore you may want to make a habit of updating the product categories of these products as soon as they are added to your database.

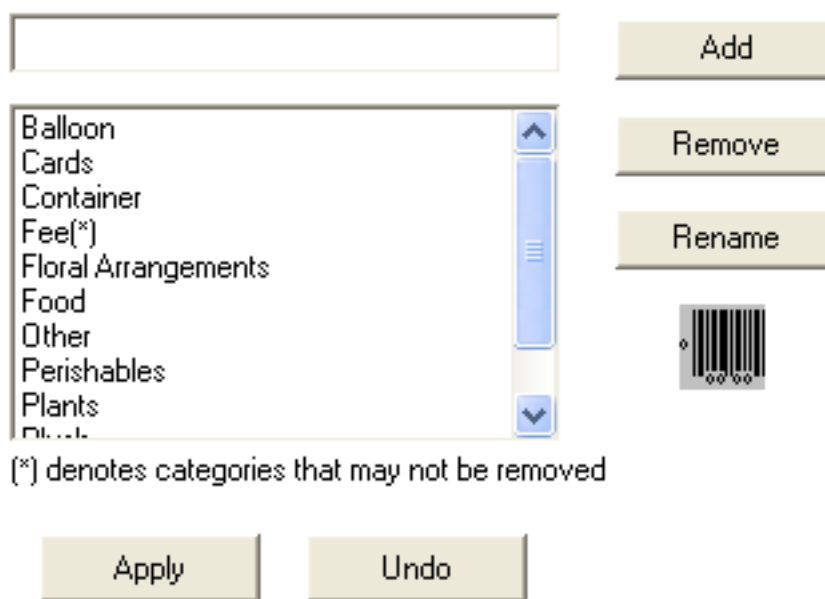
The following product categories have already been set up in FTD Mercury:

- » Cards
- » Container
- » Fee
- » Perishables
- » Plush
- » Other

To learn how to assign a product category to a product, see [Adding New Products](#) on page 8-5.

IMPORTANT You cannot Remove or Rename a product category if a GL account has been created for that product category in the Chart of Accounts Wizard.

Figure 24-35: Product Category Screen



Accessing the Product Category Screen

TASK To access the **Product Category** screen in **Mercury Administration**:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **System** folder.
- 4 Double-click **Product Category**. The **Product Category** screen opens.

Adding Product Categories

TASK To add a product category:

- 1 In **Mercury Administration**, access the **Product Category** screen.
- 2 In the text box, enter the name for the new category.
- 3 Click **Add**.
- 4 Click **Apply** to save your changes before exiting this screen.

Removing Product Categories

TASK To remove an existing product category:

- 1 In **Mercury Administration**, access the **Product Category** screen.
- 2 Select the category you want to remove from the list of existing product categories. Product categories that cannot be removed from your system are followed by (*).
- 3 Click **Remove**.
- 4 Click **Apply** to save your changes before exiting this screen.

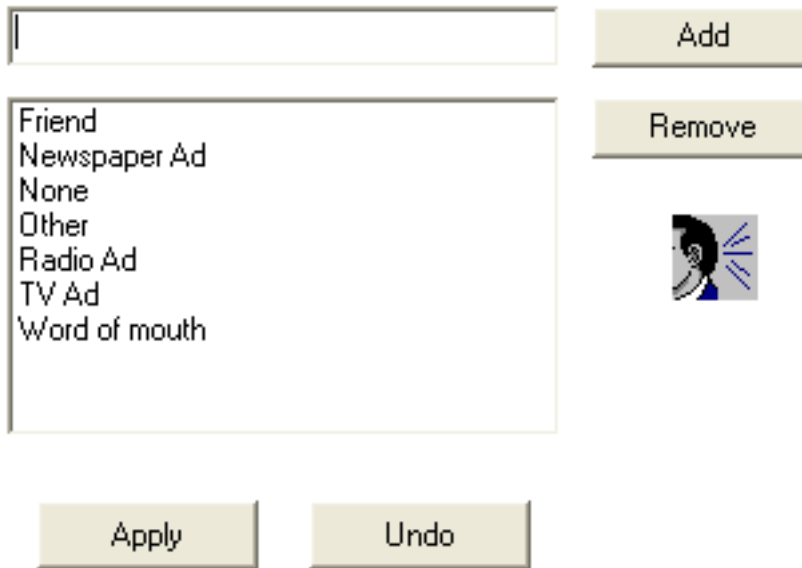
Referral Codes Screen

Referral codes are used to explain how a new customer first heard about your store (for example, a newspaper advertisement). By default, the following referral codes are already set up in your system:

- » Friend

- » Newspaper Ad
- » Radio Ad
- » TV Ad
- » Word of Mouth
- » Other
- » None

Figure 24-36: Referral Codes Screen



Accessing the Referral Codes Screen

TASK To access the Referral Codes screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **System** folder.
- 4 Click **Referral Code**. The **Referral Codes** screen opens.

Adding Referral Codes

TASK To add a referral code:

- 1 In **Mercury Administration**, access the **Referral Codes** screen.
- 2 In the text box, enter the new referral code.
- 3 Click **Add**.
- 4 Click **Apply** to save your changes before exiting this screen.

Removing Referral Codes

TASK To remove a referral code:

- 1 In **Mercury Administration**, access the **Referral Codes** screen.
- 2 In the list of existing referral codes, select the referral code you want to remove.
- 3 Click **Remove**.
- 4 Click **Apply** to save your changes before exiting this screen.

Phone Types Screen

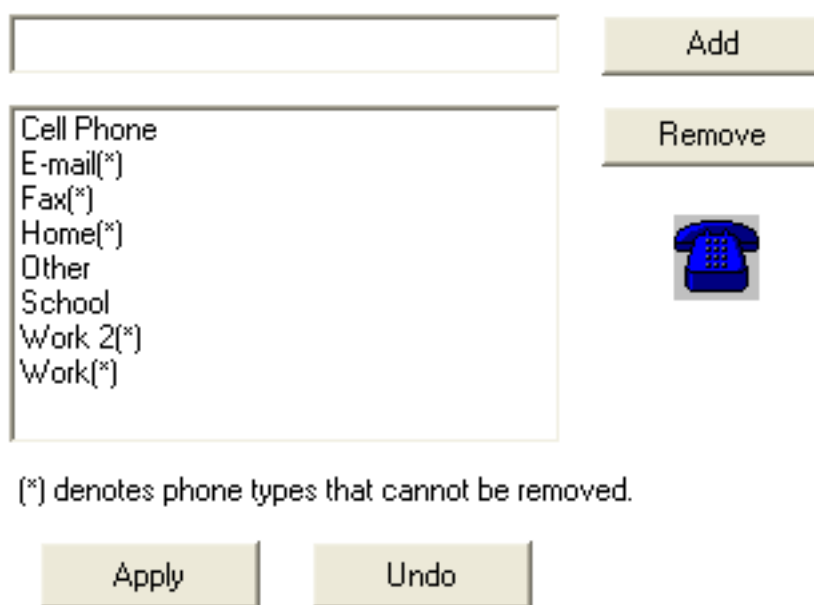
Phone types are used when entering customer and employee information into FTD Mercury. They allow you to enter multiple phone numbers so you can, for example, save both a customer's home and business phone numbers.

By default, the following phone types are already set up in your system:

- » Cell Phone
- » E-mail
- » Fax
- » Home
- » School
- » Work
- » Work2
- » Other

NOTE You cannot remove a phone type if an employee or customer has a phone number stored in your system using that phone type.

Figure 24-37: Phone Types Screen



Accessing the Phone Types Screen

TASK To access the Phone Types screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **System** folder.
- 4 Double-click **Phone Types**. The **Phone Types** screen opens.

Adding Phone Types

TASK To add a new phone type:

- 1 In **Mercury Administration**, access the **Phone Types** screen.
- 2 In the text box, enter the name for the new phone type.
- 3 Click **Add**.
- 4 Click **Apply** to save your changes before exiting this screen.

Removing Existing Phone Types

NOTE You cannot remove a phone type if an employee or customer has a phone number stored in your system using that phone type.

TASK To remove an existing phone type:


- 1 In **Mercury Administration**, access the **Phone Types** screen.
- 2 From the list of existing phone types, select the phone type you want to remove. You cannot remove phone types that are denoted with an asterisk (*).
- 3 Click **Remove**.
- 4 Click **Apply** to save your changes before exiting this screen.

Paid Out/In Types Screen

Paid out and paid in types are reasons why cash must be added or removed from the cash register drawer in Point of Sale. For example, you may have to use the Paid Out function to take cash out of the drawer to pay for gas for the delivery truck, or pay for candy or fruit for fruit baskets. The Paid In function is then commonly used to return change to the cash drawer. For details on creating and removing Paid Out types, see [Setting Up Paid Out/In Types](#) on page 11-2.

If you have the Accounting module, accounts are set up in QuickBooks for your paid in/out types. The accounts are either categorized as Cost of Goods Sold accounts or Operating Expense accounts, depending on how you set them up when you ran the Chart of Accounts Wizard. Note that if you add a paid in/out type in Mercury Administration, you must go through the Chart of Accounts Wizard again so that FTD Mercury can export the information to QuickBooks and add an account for that paid in/out type. For more information see the QuickBooks section of your FTD Mercury Reference Guide.

Figure 24-38: Paid Out/In Types Screen

Add
 Gas
 Supplies
 Fruit/Gourmet
 Vendors
 Remove
 Rename

 Apply Undo

Accessing the Paid Out/In Types Screen

TASK To access the Paid Out/In Types screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **System** folder.
- 4 Click **Paid/Out In Types**. The Paid Out/In Types screen opens.

Advanced Settings Screen

The Advanced Settings screen allows you to configure Dashboard information and purge intervals for log entries.

Figure 24-39: Advanced Settings Screen

Dashboard
 Monitor Dashboard Events
 Events Polling Interval (minutes) 1
 Purge Intervals
 Delete Log Entries Interval (days): 7
 Apply Undo

The following settings are configurable:

Table 24-26: Advanced Settings

Setting	Description
Monitor Dashboard Events	Select this option if you want to enable the FTD Mercury Dashboard.
Events Polling Interval	Set the frequency (in minutes) at which the Dashboard will check for new events.
Delete Log Entries Interval	Enter the interval in days between log purges.

Accessing the Advanced Settings Screen

TASK To access the Advanced Settings screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **System** folder.
- 4 Double-click **Advanced Settings**. The **Advanced Settings** screen opens.

Printer Settings Folder

The following screens are accessible from the Printer Settings folder:

- » [Form Alignment Screen](#)
- » [Printer Routing Screen](#)
- » [Default Form Printing Screen](#)
- » [Form Format Screen](#)

Form Alignment Screen

The Form Alignment screen (previously called the Address Settings screen) allows you to position the store address, return address, and customer address on the statement and invoice so that you can print them on your own custom letterhead, and so that they properly fit in your window envelope. The process of formatting the invoice and statement for your envelope takes some trial and error. First print out one statement and one invoice, and see where you will have to move the addresses so that they will fit. Then use this option to position the addresses.

Figure 24-40: Form Alignment Screen

The screenshot shows a 'Form Alignment Screen' with the following sections:

- Store Address:** A question 'In which position would you like the Store Address to print?' is followed by two boxes:
 - Invoice:** Radio buttons for 'Center - Billing Invoice Only' (selected), 'Left', and 'None'.
 - Statement:** Radio buttons for 'Left' (selected) and 'None'.
- Invoice Address Positioning:** Two sliders for 'Return Address' and 'Customer Address'. Each has a 'Vertical Position' slider (Higher to Lower) and a 'Horizontal Position' slider (Left to Center to Right).
- Statement Address Positioning:** Two sliders for 'Return Address' and 'Customer Address'. Each has a 'Vertical Position' slider (Higher to Lower) and a 'Horizontal Position' slider (Left to Center to Right).
- Buttons:** 'Restore Invoice Defaults', 'Restore Statement Defaults', 'Apply', and 'Undo'.

Store Address

The Store Address area allows you to configure the settings for the store address on both invoices and statements. You can configure the following settings:

Table 24-27: Store Address Settings

Setting	Invoice
Invoice	Select the position where you want your store address to print on the invoice. You can select Center (for Billing Invoices only), Left, or None to omit the store address from the invoice.
Statement	Select the position where you want your store address to print on statements. You can select Left to print it on the left side of the statement, or select None to omit it from the statement.

Invoice Address Positioning

The Invoice Address Positioning area allows you to customize the positioning of the return and customer address on the Order Entry invoice so they fit in your window envelope or print correctly on your letterhead paper. Drag the sliders to the desired position (one vertical position equals one line) for both the return address and customer address.

Statement Address Positioning

The Statement Address Positioning area allows you to customize the positioning of the return and customer address on statements. Drag the sliders to the desired positions.

Accessing the Form Alignment Screen

TASK To access the **Form Alignment** screen in **Mercury Administration**:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Printer Settings** folder.
- 4 Double-click **Form Alignment**. The **Form Alignment** screen opens.

Configuring Form Alignment Settings

TASK To configure form alignment settings:

- 1 In **Mercury Administration**, access the **Form Alignment** screen.
- 2 In the **Store Address** area, set the position for the store address for both invoices and statements.
- 3 In the **Invoice Address Positioning** area, select the position for both the return address and the customer address on invoices. If at any time you want to change your settings back to their defaults, click **Restore Invoice Defaults**.
- 4 In the **Statement Address Positioning** area, select the position for both the return address and customer address on statements. If at any time you want to change your settings back to their defaults, click **Restore Statement Defaults**.
- 5 Click **Apply** to save your changes before exiting this screen.

Printer Routing Screen

The Printer Routing screen allows you to specify for each incoming and outgoing message type the number of copies you want printed when a message is sent or received. You can also specify the printer and printer tray to use when printing.

Figure 24-41: Printer Routing Screen

Shop Code:

Printer:

Tray:

	Fax	Microsoft Office Document Im
Gen Out	None	Single Tray Printer 0
Gen In	None	Single Tray Printer 0
Order Out	Print	Single Tray Printer 0
Order In	Popup	Single Tray Printer 0
Cancel Out	Print & Popup	Single Tray Printer 0
Cancel In	Print & Alarm	Single Tray Printer 0
Reject Out	None	Single Tray Printer 0
Reject In	None	Single Tray Printer 0
Con Out	None	Single Tray Printer 0
Con In	None	Single Tray Printer 0
Den Out	None	Single Tray Printer 0
Den In	None	Single Tray Printer 0
For Out	None	Single Tray Printer 0
For In	None	Single Tray Printer 0
Ask Out	None	Single Tray Printer 0

For each message type, you can also select further behavior:

Table 24-28: Message Behavior

Setting	Description
Print	The message prints to the designated printed.
Popup	You receive a message confirming the message has been sent or received. For example: The General message has been sent.
Print and Popup	The message both prints to your printer and you receive a confirmation message.
Print and Alarm	The message prints to your printer and a short beep sounds.

Accessing the Printer Routing Screen

TASK To access the Printer Routing screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Wire Service** folder.

- 4 Double-click **Printer Routing**. The **Printer Routing** screen opens.

Changing Printer Routing Options

TASK To change printer routing options:

- 1 Access the **Printer Routing Options** screen in Mercury Administration.
- 2 By default, your shop code appears in the **Shop Code** field. click the arrow and choose the shop code for which you want to set printer routing from the list.
- 3 To change the default Mercury Message printer, click the arrow in the **Printer** list and choose your default printer. All messages print to this printer (unless otherwise specified).
- 4 To change the default printer tray, click the arrow in the **Default Tray** list and choose a default tray for your printer.
- 5 Click **Advanced** if you want to change the method of printer routing or the number of copies that you want to print for each message type.
- 6 Initially, one copy of each incoming and outgoing message type prints to your default printer and tray. To change these settings, follow the procedures below:
 - a. Click to the right of the word **Print** to reveal an arrow, and choose from the list whether you want that particular message to print, pop up on your screen, print & popup, print & alarm, or none of these. See [Printer Routing Screen](#) on page 24-80 for explanation.
 - b. To change the tray to which this message will print, click to the right of the default tray name to reveal an arrow and then click the desired tray name.
 - c. Click to the right of the number to change the number of copies. When the up and down arrows appear, select the number of copies you wish to print at each printer.
 - d. When finished, click **Close**.
- 7 Click **Apply** to save the information before exiting this screen.

Default Form Printing Screen

The Default Form Printing screen allows you to define the number of each form type that will print depending on the delivery zone type selected. You can specify how many of each of the following forms will print for Carry Out, Pickup, Local, Pool, and Wire Out zones:

- » Billing Invoice (Letter)
- » Billing Invoice (Legal)
- » Working Invoice (Letter)
- » Working Invoice (Legal)
- » TriFold Card

Figure 24-42: Default Form Printing Screen

Store Name:

Default Form Printing

Forms	Carry Out	Local	Pickup	Wire Out	Pool
Billing Invoice (Letter)	0	0	0	0	0
Billing Invoice (Legal)	1	1	1	1	1
Worksheet (Letter)	0	0	0	0	0
Worksheet (Legal)	0	0	0	0	0
TriFold Card	0	0	0	0	0
Pool Ticket	0	0	0	0	0

Accessing the Default Form Printing Screen

TASK To access the Default Form Printing screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Printer Settings** folder.
- 4 Double-click **Default Form Printing**. The **Default Form Printing** screen opens.

Configuring Forms to Print

TASK To configure the number and type of forms to print for zone types:

- 1 Access the **Default Form Printing** screen in **Mercury Administration**.
- 2 Select the name of the store you are configuring from the **Store Name** list (if it is not already selected).
- 3 For each form type, click in the delivery zone column and use the up and down arrows to set the number of forms you want to print.
- 4 When you are finished, click **Apply** to save your changes before exiting the screen.

TIP If you are set up as a multi-store shop, you can select another store from the **Store Name** list before you exit the screen. Your settings are retained, allowing you to simply click **Apply** to save these changes for other stores.

Form Format Screen

The Form Format screen allows you to configure the information that FTD Mercury prints on forms. You can configure the following forms:

- » [Billing Invoice \(Letter\)](#)
- » [Billing Invoice \(Legal\)](#)
- » [Working Invoice \(Letter\)](#)
- » [Working Invoice \(Legal\)](#)
- » [TriFold Card](#)

When you configure the information that prints on forms, you are configuring it for all forms printed from your store. If you are configured as a multi-store shop, you can configure printing on a per-shop basis.

Figure 24-43: Form Format Screen

Form Format

Store Name:

Form:

Select Section	
Header	<input checked="" type="checkbox"/>
Sold To	<input checked="" type="checkbox"/>
Deliver To	<input type="checkbox"/>
Order Info	<input type="checkbox"/>
Credit Card	<input checked="" type="checkbox"/>
Occasion	<input type="checkbox"/>
Florist Info	<input type="checkbox"/>
Delivery Slip	<input type="checkbox"/>

Store Name	<input checked="" type="checkbox"/>
Store Address	<input checked="" type="checkbox"/>
Order No	<input type="checkbox"/>
Bar Code	<input type="checkbox"/>
Amount Remitted	<input checked="" type="checkbox"/>
Delivery Date	<input type="checkbox"/>
Time Detail	<input type="checkbox"/>

Apply Undo

Billing Invoice (Letter)

The Billing Invoice (Letter) form is used for printing a billing invoice without an attached card. The form is 8½x11 inches, and contains the following sections and options:

Table 24-29: Billing Invoice (Letter) Configurable Sections and Information

Section	Information Available to Print
Header	<ul style="list-style-type: none"> » Store Name » Store Address » Order No » Bar Code » Amount Remitted » Delivery Date » Time Detail
Sold To	<ul style="list-style-type: none"> » Customer Address » Customer Phone » Ordered By
Deliver To	<ul style="list-style-type: none"> » Recipient Address » Recipient Phone

Table 24-29: Billing Invoice (Letter) Configurable Sections and Information (cont.)

Section	Information Available to Print
Order Info	<ul style="list-style-type: none"> » Order No » Customer No » Order Date » Delivery Date » Pay Method » Sales Person » Order Type » Copy No
Credit Card	<ul style="list-style-type: none"> » Cardholder » Number » Authorization
Occasion	<ul style="list-style-type: none"> » Occasion » Card Message » Order Notes
Florist Info	<ul style="list-style-type: none"> » Florist Code » Florist Name » Florist City » Florist Phone » Contact » Mercury No
Delivery Slip	<ul style="list-style-type: none"> » Order No » Delivery Zone » Signature Line » Products » Copy No » Bar Code » Store Name » Recipient Phone

Billing Invoice (Legal)

The Billing Invoice (Legal) form is the legal-sized version (8½×14 inch) of the billing invoice. It includes all of the information on the Billing Invoice (Letter) form, but also includes a quad-fold

card. In versions of FTD Mercury prior to 8.0, this was the only invoice available. The sections and options available to print include

Table 24-30: Billing Invoice (Legal) Configurable Sections and Information

Section	Information Available to Print
Header	<ul style="list-style-type: none"> » Store Name » Store Address » Order No » Bar Code » Amount Remitted » Delivery Date » Time Detail
Sold To	<ul style="list-style-type: none"> » Customer Address » Customer Phone » Ordered By
Deliver To	<ul style="list-style-type: none"> » Recipient Address » Recipient Phone
Order Info	<ul style="list-style-type: none"> » Order No » Customer No » Order Date » Delivery Date » Pay Method » Sales Person » Order Type » Copy No
Credit Card	<ul style="list-style-type: none"> » Cardholder » Number » Authorization
Occasion	<ul style="list-style-type: none"> » Occasion » Card Message » Order Notes
Florist Info	<ul style="list-style-type: none"> » Florist Code » Florist Name » Florist City » Florist Phone » Contact » Mercury No
Delivery Slip	<ul style="list-style-type: none"> » Order No » Delivery Zone » Signature Line » Products » Copy No » Bar Code » Store Name » Recipient Phone

Table 24-30: Billing Invoice (Legal) Configurable Sections and Information (cont.)

Section	Information Available to Print
Card	<ul style="list-style-type: none"> » Recipient Phone » Delivery Date » Time Detail » Order No » Care Instructions <p>NOTE: When you select Sympathy as the Occasion Code in Order Entry or Point of Sale, legal-sized invoices print the acknowledgement address (the sender's address) instead of the care instructions. Clearing this option does not prevent the acknowledgement address from printing.</p> <ul style="list-style-type: none"> » Guarantee » Bar Code » Store Name » Delivery Zone » Rotate 90 Degrees—allows you to rotate the card message and guarantee 90 degrees clockwise and the care instructions 90 degrees counterclockwise. The address portion of the card does not rotate. If you have a funeral/ sympathy card (when the occasion selected in Order Entry or Point of Sale is Sympathy), the care instructions are replaced by they sympathy sender's address and this text does not rotate.

Working Invoice (Letter)

The Working Invoice (Letter) form is an invoice to use internally for a designer. It is printed on letter-sized paper (8½×11 inch) and includes the following sections:

Table 24-31: Working Invoice (Letter) Configurable Sections and Information

Section	Information Available to Print
Header	<ul style="list-style-type: none"> » Order No » Bar Code » Store Name » Order Type » Delivery Date » Time Detail
Order Info	<ul style="list-style-type: none"> » Customer Name » Customer Phone » Ordered By » Pay Method » Sales Person » Occasion » Copy No

Table 24-31: Working Invoice (Letter) Configurable Sections and Information (cont.)

Section	Information Available to Print
Florist Info	<ul style="list-style-type: none"> » Florist Code » Florist Name » Florist City » Florist Phone » Contact » Mercury No
Delivery Slip	<ul style="list-style-type: none"> » Order No » Delivery Zone » Signature Line » Products » Copy No » Bar Code » Store Name » Recipient Phone <p>Delivery date and day will always print you delivery slips.</p>
Product Info	<ul style="list-style-type: none"> » Product Code » Product Recipe » Second Choice » Order Notes » Card Message

Working Invoice (Legal)

The Working Invoice (Legal) form is the legal-sized (8½×14 inch) version of the Working Invoice (Letter), and it includes all the information in the letter-sized version plus a quad-fold card. This worksheet includes the following sections:

Table 24-32: Working Invoice (Legal) Configurable Sections and Information

Section	Information Available to Print
Header	<ul style="list-style-type: none"> » Order No » Bar Code » Store Name » Order Type » Delivery Date » Time Detail
Order Info	<ul style="list-style-type: none"> » Customer Name » Customer Phone » Ordered By » Pay Method » Sales Person » Occasion » Copy No

Table 24-32: Working Invoice (Legal) Configurable Sections and Information (cont.)

Section	Information Available to Print
Florist Info	<ul style="list-style-type: none"> » Florist Code » Florist Name » Florist City » Florist Phone » Contact » Mercury No
Delivery Slip	<ul style="list-style-type: none"> » Order No » Delivery Zone » Signature Line » Products » Copy No » Bar Code » Store Name » Recipient Phone <p>Delivery date and day will always print you delivery slips.</p>
Card	<ul style="list-style-type: none"> » Recipient Phone » Delivery Date » Time Detail » Order No » Care Instructions <p>NOTE: When you select Sympathy as the Occasion Code in Order Entry or Point of Sale, legal-sized invoices print the acknowledgement address (the sender's address) instead of the care instructions. Clearing this option does not prevent the acknowledgement address from printing.</p> <ul style="list-style-type: none"> » Guarantee » Bar Code » Store Name » Delivery Zone » Rotate 90 Degrees—allows you to rotate the card message and guarantee 90 degrees clockwise and the care instructions 90 degrees counterclockwise. The address portion of the card does not rotate. If you have a funeral/ sympathy card (when the occasion selected in Order Entry or Point of Sale is Sympathy), the care instructions are replaced by they sympathy sender's address and this text does not rotate.
Product Info	<ul style="list-style-type: none"> » Product Code » Product Recipe » Second Choice » Order Notes » Card Message

TriFold Card

The TriFold Card form in FTD Mercury allows you to print on a 4×9½-inch trifold card. The card itself consists of three sections. The upper section (3×4 inches) is for the card message. The middle

section (3¼×4 inches) is for care instructions. The bottom section (3¼×4 inches) is for the recipient name and address.

NOTE Trifold cards require a printer capable of handling the smaller paper size. For more information, contact FTD Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com.

By default, FTD Mercury leaves a ¼ inch border on all sides of the card message section so you can use imprinted cards for you shop. Additionally, FTD Mercury leaves a ½ inch border at the bottom of the recipient section so you can use cards with your store logo (if desired).

There is only one section available to print for the TriFold card: Card. You can select whether you want to print the following information:

- » Recipient Phone
- » Delivery Date
- » Time Detail
- » Delivery Zone
- » Order No
- » Care Instructions

NOTE When you select Sympathy as the Occasion Code in Order Entry or Point of Sale, legal-sized invoices print the acknowledgement address (the sender's address) instead of the care instructions. Clearing this option does not prevent the acknowledgement address from printing.

- » Bar Code
- » Store Name
- » Borders
- » Center Tray—when this option is selected, FTD Mercury assumes the card is in the center of a tray. When cleared, FTD Mercury assumes the card is in the left side of the tray. Configure this setting as appropriate for your card stock location in the tray.

By default, all information will print for the TriFold Card form except for Borders. If you do not print borders, you can easily use imprinted paper for your trifold cards.

IMPORTANT Guarantees, available on cards for the Billing Invoice (Legal) and Working Invoice (Legal), are not available for the TriFold Card form.

Accessing the Form Format Screen

TASK To access the **Default Form Printing** screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Printer Settings** folder.
- 4 Double-click **Form Format**. The **Form Format** screen opens.

Configuring Information to Print in Forms

TASK To configure the information that prints in a form:

- 1 Access the **Form Format** screen in **Mercury Administration**.
- 2 If you are configured as a multi-store, from the **Store Name** list, select the store for which you are configuring the form.
- 3 From the **Form Name** list, select the form you are configuring.

- 4 From the **Select Section** list, select the section on the form you want to configure. Information that you can print appears in the list on the right. If you want the information to print on the form, select the appropriate box; clear boxes if you want information to be omitted from the form. Repeat for other sections.
- 5 Click **Apply** to save your changes.

You will have to restart FTD Mercury clients for your changes to be reflected. The changes you made affect all orders printed on the form you configured for the selected store.

Wire Service Folder

The following screens are accessible from the Wire Service folder:

- » [WireServices Screen](#)
- » [CurrencySettings Screen](#) (available only on Canadian systems)
- » [Automatic Order Processing Screen](#)

WireServices Screen

The WireServices option allows you to update your florist directories and allocate wire service percentages. If you are set up as a Canadian shop, you can also set the current exchange rate and set the conversion chart multiplier.

Figure 24-44: WireServices Screen

Wire Service

FTD
▼

Update Directory

Wire Dollar Limit

Base Amount	Sender	Receiver	Wire Service
\$ 30.00	10.00	83.00	7.00
\$99,999.99	20.00	73.00	7.00

Apply

Undo

The WireServices screen contains the following settings:

Table 24-33: WireServices Screen Settings

Setting	Description
Wire Service List	Select the wire service to which you are making changes. You may update the floral directory for the wire service, or, if you are a Canadian shop, you can set the current exchange rate and conversion chart multiplier for the selected wire service.
Update Directory	Click the Update Directory button to begin updating the floral directory for the selected wire service.
Current Exchange Rate	<p><i>Applies only to Canadian shops.</i> Enter the exchange rate percentage to use when converting U.S. funds to Canadian funds for the selected wire service. When outgoing orders are transmitted from Canadian shops using Canadian currency to U.S. shops using U.S. currency, the value here will be used to convert the funds. This rate is also used in processing incoming orders in U.S. dollars to Canadian dollars.</p> <p>This field will accept up to eight digits to the right of the decimal point.</p> <p>This exchange rate is used to convert Canadian currency entered in Order Entry to U.S. dollars when an outgoing order is transmitted to the United States. It is also used to convert U.S. currency to Canadian dollars when an incoming order is received in U.S. dollars.</p>
Conversion Chart Multiplier	<p><i>Applies only to Canadian shops.</i> For the currently selected wire service, enter the multiplier from the tax conversion charts in this field. This field will accept up to four digits to the right of the decimal point.</p> <p>The conversion chart multiplier is used to compute the fill value of incoming wire orders received from outside Canada that are subject to additional taxation.</p> <p>The conversion chart multiplier is used when from the U.S. are received in Canada. This formula, provided by each wire service, allows FTD Mercury to compute the Canadian dollar amount to be used when filling the order, taking into account taxes. For example, if the conversion chart multiplier for a GST province is 91% (.91), if you receive an order from the United States for \$100 CDN, the fill value of the order should be \$91.00 CDN.</p> <p>FTD lists the conversion chart multiplier in the printed FTD Directory as a conversion chart; other directories call it filling order conversion chart (or something similar).</p>
Wire Dollar Limit	This section provides a breakdown of the allocation of funds for base amounts listed. You should not change the percentages in this screen unless you are instructed to do so by your wire service.

Accessing the WireServices Screen


TASK To access the Wire Services screen in Mercury Administration:

- 1 Launch Mercury Administration.
- 2 Double-click Mercury Administration in the explorer pane.
- 3 Double-click the Wire Service folder.
- 4 Double-click WireServices. The WireServices screen opens.

Updating the Florist Directory

The following procedure teaches you how to update your florist directories when you receive new directory CDs from FTD. This process takes about 20 minutes.

NOTE To learn how to receive updates in between CDs (via an Internet download), see [“Bi-Monthly Directory Update” on page 60](#).

- 1 Close FTD Mercury by clicking  in the upper right-hand corner of the **FTD Mercury Main Menu**.
- 2 Shut down the server. To do this, right-click on the black Mercury Man icon in the lower right-hand corner of the screen (in the system tray) and select **Close**.
- 3 In Mercury Administration, access the WireServices screen.
- 4 Place a florist directory CD into your CD-ROM drive. You will be updating each directory individually.
- 5 In the **Wire Service** area, select the wire service directory you are updating.
- 6 Click **Update Directory**. The directory takes about 10–20 minutes to update. The process may seem to pause for periods of time, but the update completes only when the black DOS window closes.
- 7 When the process is complete, remove the update CD.
- 8 Repeat steps 4–7 for each directory that you are updating.
- 9 Restart the server. To do this, on the **Windows Start** menu, point to **All Programs**, then point to **FTD Software**, and click **FTDStartup**.

Your florist directories are now updated. You can now start and log into FTD Mercury.

Setting the Current Exchange Rate

NOTE This procedure applies only to Canadian systems.

For the FTD wire service, you should set the exchange rate to the value in the printed FTD Florist Directory.

TASK **To set the current U.S. to Canada exchange rate:**

- 1 In **Mercury Administration**, access the **WireServices** screen.
- 2 From the **Wire Service** list, select the wire service for which you are setting the exchange rate.
- 3 In the **Current Exchange Rate** field, enter the current exchange rate to use when converting U.S. dollars to Canadian dollars.
- 4 Click **Apply** to save your changes before exiting this screen.

Setting the Conversion Chart Multiplier

For the FTD wire service, you should set the conversion chart multiplier to the value printed in the FTD Florist Directory.

NOTE This procedure applies only to Canadian systems.

TASK **To set the conversion chart multiplier:**

- 1 In **Mercury Administration**, access the **WireServices** screen.
- 2 From the **Wire Service** list, select the wire service for which you are setting the conversion chart multiplier.
- 3 In the **Conversion Chart Multiplier** field, enter the conversion chart multiplier value.
- 4 Click **Apply** to save your changes before exiting this screen.

Allocating Wire Service Percentages

IMPORTANT You should not change the percentages in this screen unless you are instructed to do so by your wire service.

If you need to change the allocation of funds, enter the new base amount and sender, receiver, and wire service percentages in their appropriate columns. Entries must total 100%, and your system coordinates its percentages to total 100%. Be sure your base prices in the **Base Amount** column are entered in ascending order (smallest dollar amount to greatest).

NOTE The Wire Service Commissions account in the General Ledger module uses the percentage specified in the Sender column for the appropriate base amount. Meanwhile, the Wire Service Payable account in the General Ledger module uses the percentages specified in the Receiver and Wire Service columns for the appropriate base amount.

Click **Apply** to save the information before exiting this screen.

CurrencySettings Screen

NOTE This screen is only accessible if FTD Mercury is configured as Canadian.

By default, FTD Mercury identifies the origin of a florist by using the state or province information from the Florist Directory.

The CurrencySettings screen allows you to configure currency settings for florist shop code numbers that are not listed in the Florist Directory. For these florists, you can define the florist's shop code, whether the florist is inside or outside of Canada, and whether funds received from this florist is in U.S. currency.

Figure 24-45: CurrencySettings Screen

Origin and Currency

Florist Code	Out of Country	US Currency
70-0336A,A	<input type="checkbox"/>	<input type="checkbox"/>
90-0266A,A	<input checked="" type="checkbox"/>	<input type="checkbox"/>
90-0266US	<input checked="" type="checkbox"/>	<input type="checkbox"/>
90-8400A,A	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
90-8418A,A	<input type="checkbox"/>	<input type="checkbox"/>
90-9200A,A	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Apply Undo Remove

The CurrencySettings screen contains the following settings:

Table 24-34: CurrencySettings Screen Settings

Setting	Description
Florist Code	Enter a florist code for a florist not in the directory for which you need to configure how to handle currency settings. The code must be at least 3 characters in length and no more than 11 (including a mandatory hyphen in the third position). The code can only consist of alphanumeric characters and the hyphen in the third position.
Out of Country	Select this option if this florist is outside of Canada. By default, when you enter a florist in this screen, this option will be selected. If this option is not selected, FTD Mercury will process orders received from this florist as coming from within Canada.
US Currency	When this option is selected, orders from this florist are received in U.S. currency. By default, this option is selected. When this option is not selected, orders received from this florist are assumed to be received in Canadian funds.

Several florist ID numbers used by FTD divisions are included in this list by default; these ID numbers cannot be removed or changed. They are:

Table 24-35: Default Listings in the CurrencySettings Screen

FTD Division	Code	Out of Country	U.S. Currency
FTD.com	90-8400AA	X	X
Flowers All Hours (FAH)	90-9200AA		
Flowers Online (FOL)	90-8418AA		
Canadian Domestic Retrans	70-0336AA		
International Retrans	90-0266AA	X	
International Retrans	90-0266US	X	

Accessing the CurrencySettings Screen

IMPORTANT This screen is accessible only for Canadian shops.

TASK To access the CurrencySettings screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Wire Service** folder.
- 4 Double-click **CurrencySettings**. The **CurrencySettings** screen opens.

Adding a Non-Directory Florist

IMPORTANT This procedure only applies to Canadian shops.

TASK To add a non-directory florist to FTD Mercury for currency processing purposes:

- 1 Access the **CurrencySettings** screen in **Mercury Administration**.
- 2 In the **Florist Code** column, click in an empty cell.

- 3 Enter the florist code for the florist. The code must be at least 3 characters in length and no more than 11 characters (including a mandatory hyphen in the third position) and must consist only of alphanumeric characters and the hyphen in the third position. FTD Mercury will automatically adjust your entry to fit its expected format.
- 4 If the florist is outside of Canada, ensure the **Out of Country** check box is selected.
- 5 If the florist is sending money in U.S. currency, select the **US Currency** check box. Otherwise, FTD Mercury will assume the money is in Canadian funds.
- 6 Click **Apply** to save your changes before exiting this screen.

Removing Non-Directory Florists

IMPORTANT This procedure only applies to Canadian shops.

TASK To remove a florist from the **CurrencySettings** screen:

- 1 Access the **CurrencySettings** screen in **Mercury Administration**.
- 2 In the **Florist Code** column, right-click the florist code and click **Remove**.
- 3 Click **Apply** to save your changes before exiting this screen.

Automatic Order Processing Screen

The Automatic Order Processing screen in Mercury Administration allows you to configure settings for how FTD Mercury automatically handles incoming messages (Mercury orders, Flowers All Hours, Florists Online, and Web orders using the Web Order Interface). For more information on Automatic Order Processing, see [Automatic Order Processing \(AOP\)](#) on page 10-1.

IMPORTANT You can only use Automatic Order Processing if you process credit cards over the Internet, as opposed to processing them through a dial-up (modem) connection. If you are not configured to process credit cards over the Internet, the configurations on this screen will be disabled.

If an order cannot automatically be processed (because it lacks necessary information), you will have to attach the order manually in Order Entry or Point of Sale.

Automatic order processing is defined on a per-store basis, meaning if you are configured as a multi-store system, you must configure settings for how each store handles order processing.

For each store, you need to configure how (and whether) FTD Mercury incoming orders, Flowers All Hours (FAH) orders, Florists Online (FOL) orders, and orders from your Web site (via the Web Order Interface) are processed. By default Automatic Order Processing is disabled. For each order type, all orders of that type will automatically be processed by the options you set.

- » **Local Orders**—When you select this option, FTD Mercury will automatically process local orders of the selected type. Incoming FTD Mercury orders can only be processed as local orders. If you select this option for an order type, the All Orders as Outgoing box will be cleared.
- » **Outgoing Orders**—When you select this option, FTD Mercury will automatically process outgoing orders of the selected type. If you select this option for an order type, the All Orders as Outgoing box will be cleared.
- » **All Orders as Outgoing**—When you select this option, all orders of the type you are configuring will be processed as outgoing orders. If you select this option, the Local Orders and Outgoing Orders boxes will be cleared.

If you want to disable automatic order processing in FTD Mercury for a particular order type, clear all check boxes for that order type. If you want to disable automatic order processing entirely, clear all check boxes in the order processing configuration grid.

NOTE If you have automatic order processing configured for your FOL site and you have either Outgoing Orders or All Orders as Outgoing selected, any WebGifts orders will automatically be sent to FTD without any intervention.

Figure 24-46: Automatic Order Processing Screen

Automatic Order Processing

90-9085J/W Margie's Flowers

Order Types	Local Orders	Outgoing Orders	All orders as Outgoing
Incoming Orders	<input checked="" type="checkbox"/>		
FAH Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
FOL Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Web Orders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Apply Undo


Accessing the Automatic Order Processing Screen

TASK To access the Automatic Order Processing Screen screen in Mercury Administration:

- 1 Launch **Mercury Administration**.
- 2 Double-click **Mercury Administration** in the explorer pane.
- 3 Double-click the **Wire Service** folder.
- 4 Double-click **Automatic Order Processing**. The **Automatic Order Processing** screen opens.

Exiting Mercury Administration

TASK To exit Mercury Administration:

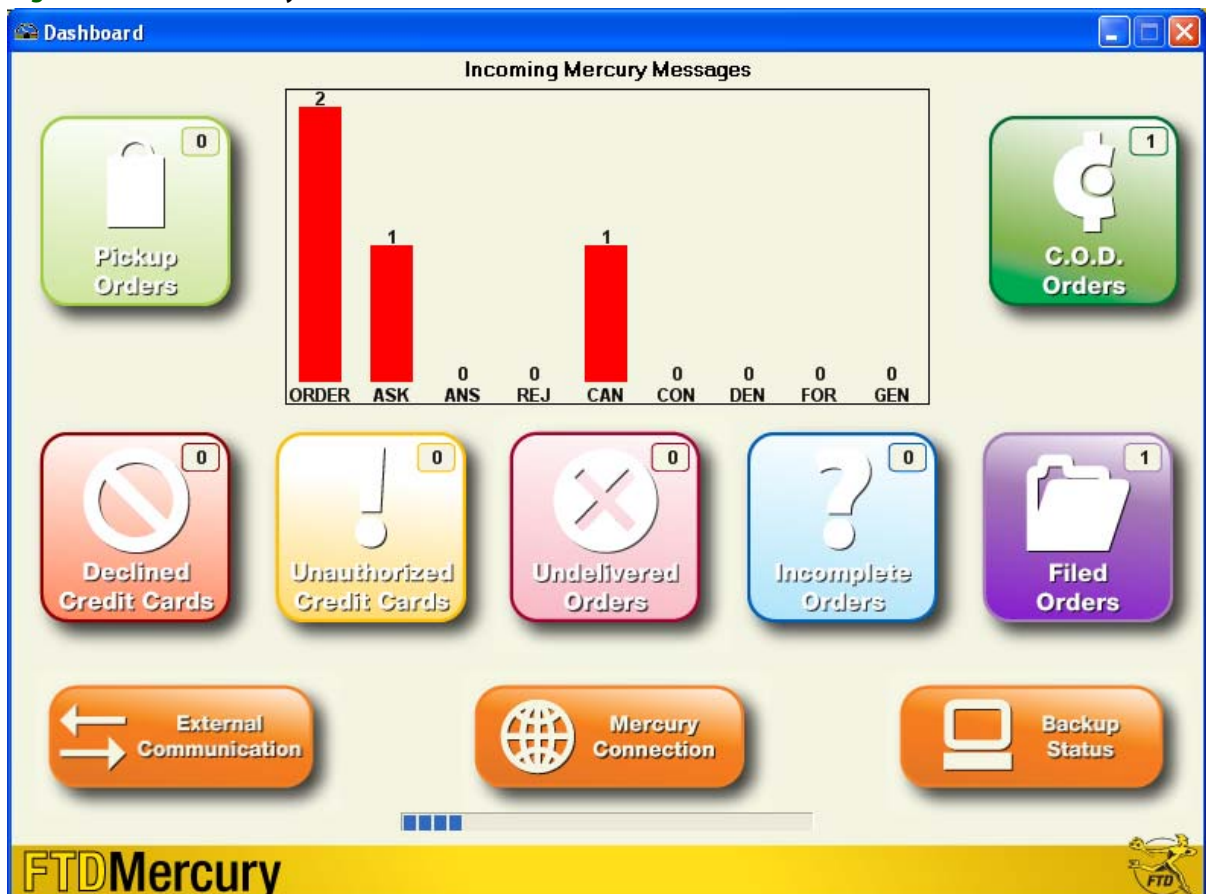
Click  in the upper-right corner of the main window in Mercury Administration, or on the **File** menu, click **Exit**.

Dashboard

Designed to give you immediate visibility into today's orders and messages, the FTD Mercury Dashboard allows you to quickly review important information about your store so you can make day-to-day decisions about your business. It also can help you determine the tasks you still need to perform before closing your shop at the end of the day.

The Dashboard is a snapshot of today's activities; messages for past or future dates are not reflected in the Dashboard. Additionally, the order indicators for C.O.D., pickup, and undelivered orders are only for today's orders. However, declined credit cards, unauthorized credit cards, incomplete orders, and filed orders reflect the number of these order types regardless of the date.

Figure 25-1: FTD Mercury Dashboard



At the end of each day, you should ensure that no order indicators have items associated with them (that is, the number at the top right of the indicator should be zero and the color should be muted). Additionally, you should ensure there are no Order messages in the Incoming Mercury Messages

chart (that is, you've attached or rejected all incoming orders), you have sent an ANSWER to all incoming ASK messages, and you have sent a CONFIRMATION or DENY message in response to all incoming CANCEL message.

NOTE ANS, REJ, CON, DEN, FOR, and GEN messages are listed for your information. You cannot reduce these; the counters will reset the next day.

If your Dashboard is clear (aside from the ANS, REJ, CON, DEN, FOR, and GEN messages), you can proceed to other end of day tasks, such as performing z-out transactions, balancing your cash drawers, and preparing your bank deposit.

Enabling Dashboard

Before you can use the Dashboard, you must enable it in Mercury Administration. This allows all terminals to access Dashboard if configured to do so.

- » [Enabling Dashboard in Mercury Administration](#)
- » [Configuring Terminals to Display the Dashboard](#)
- » [Opening Dashboard](#)

Enabling Dashboard in Mercury Administration

TASK To enable the FTD Mercury Dashboard:

- 1 In **Mercury Administration**, double-click on the **System Folder** icon.
- 2 Double-click on the **Advanced Settings** icon. The **Advanced Settings** screen opens.
- 3 Select the **Monitor Dashboard Events** box.
- 4 In the **Events Polling Interval** field, enter the number of minutes you want the Dashboard to wait before it refreshes. This can be from 1 to 15 minutes, although FTD recommends you leave this setting at its default 1 minute interval.
- 5 Click **Apply** to save your changes before exiting this screen.

Configuring Terminals to Display the Dashboard

Once you have enabled Dashboard in Mercury Administration, it will be available at all FTD Mercury terminals. You must set each terminal you want to access the Dashboard from to display the Dashboard.

TASK To configure a terminal to display the Dashboard:

- 1 In **FTD Mercury**, from the **Tools** menu, click **Settings**. The **FTD Mercury Configuration** window opens.
- 2 Select the **Display Dashboard** box.
- 3 Click **Save**.

Opening Dashboard

TASK To open the Dashboard on a terminal where you are allowing Dashboard display:

Double-click the **Mercury Dashboard** icon on the FTD Mercury desktop.

You can also minimize the Dashboard to the Windows Taskbar by clicking the **Minimize** button on the Dashboard title bar (at the top of the window). If the Dashboard is minimized, it will flash if there is a change in status after it refreshes.

Events that Cause Dashboard to Flash when Minimized

When Dashboard is minimized in the Windows Taskbar, most events will cause the Dashboard to flash if there is a change in status after it refreshes. The following table shows you which events do and do not cause a flash when the Dashboard is minimized:

Table 25-1: Events that Cause Dashboard to Flash when Minimized

Indicator	Causes Dashboard to Flash when Minimized?
FTD Order	Yes
ASK Message	Yes
ANSwer Message	Yes
REJect Message	Yes
CANcel Message	Yes
CONfirmation Message	No
DENy Message	Yes
FORward Message	No
GENeral Message	No
Pickup Order for Today	Yes
C.O.D. Order for Today	Yes
Declined Credit Card	Yes
Unauthorized Credit Card	Yes
Undelivered Order for Today	No
Incomplete Order	Yes
Filed Order	Yes
External Communication	Yes
Mercury Connection	Yes
Backup Status	Yes

Dashboard Information

When you open Dashboard, there is a lot of information right in front of you. This information can help you make decisions on what needs to be done, or help you identify problems right when they happen, instead of finding out hours or days later (or maybe never finding out).

The Dashboard is a snapshot of today's activities; messages and orders that are for past or future dates are not reflected in the Dashboard.

There are three main information areas on the dashboard:

- » [Incoming Mercury Messages Chart](#)
- » [Order Indicators](#)
- » [Communication Status Indicators](#)

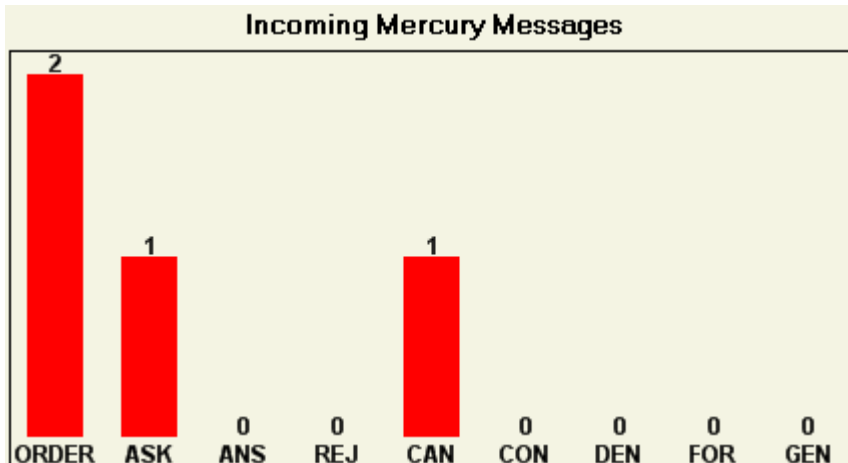
The Dashboard refreshes based on a polling interval set in the Advanced Settings screen in Mercury Administration. Typically, this is set to refresh every minute. At the bottom of the screen, below the

status indicators, a progress bar updates indicating how long until the next refresh. When the bar fills, the Dashboard contacts the FTD Mercury server for updated information.

Incoming Mercury Messages Chart

The Incoming Mercury Messages chart is located at the top center of the Dashboard. It is a graphical representation of the number of incoming messages of different types you have received today. In the case of Orders, ASK messages, and CANcel messages, it reflects the number of these message types received today that you need to take action on.

Figure 25-2: Incoming Mercury Messages Chart



The chart displays the following message types:

- » **ORDER:** Incoming orders received on the current date that have not been attached or rejected.
- » **ASK:** Incoming ASK messages received on the current date that do not have a corresponding ANSwer messages.
- » **ANS:** All incoming ANSwer messages received on the current date.
- » **REJ:** All incoming REJect messages received on the current date.
- » **CAN:** Incoming CANcel messages received on the current date that do not have a corresponding CONfirm or DENy message.
- » **CON:** All incoming CONfirm messages received on the current date.
- » **DEN:** All incoming DENy messages received on the current date.
- » **FOR:** All incoming FORward message received on the current date.
- » **GEN:** All GENeral message received on the current date.

The chart includes the number of each message type directly below the graphical bar and above the label.

By taking action on Orders, ASK messages, and CANcel messages, you can reduce the number of messages in this chart. For example, if you attach an incoming order, it will no longer appear under the Order bar of the chart. Likewise, if you send an ANSwer message to reply to an ASK message, the ASK message will be removed from the chart. In addition, if you send a CONfirm or DENy message to a CANcel message, the CANcel message will be removed from the chart.

Order Indicators

In addition to the Incoming Mercury Messages chart, the Dashboard also includes several order indicators, which provide visual cues for specific order types, statuses, and potential issues for today. Dashboard includes the following order indicators:

- » [Pickup Orders](#)
- » [C.O.D. Orders](#)
- » [Declined Credit Cards](#)
- » [Unauthorized Credit Cards](#)
- » [Undelivered Orders](#)
- » [Incomplete Orders](#)
- » [Filed Orders](#)

Each order indicator has two possible states. If there are orders that fit the criteria the indicator measures, the indicator will be a bright color, and the counter will have a value greater than 0. If there are no orders that fit that criteria, the counter will be 0 and the indicator color will be a muted version of the bright color.

After the Dashboard polls the server, if there is any change in activity, the counters will update for each indicator and the indicators may light up or dim.

Pickup Orders

The Pickup Order indicator lets you know how many orders there are assigned to pickup delivery zones with today's delivery date (that is, how many orders are marked for pickup today). When there are one or more orders, the Pickup Orders indicator will light up and appear as a bright lime green. The actual number of pickup orders that are waiting appears in the counter area.

Figure 25-3: Pickup Orders Indicator (with and Without Items)



Once an order is picked up and completed (that is, the Pickup order is marked as delivered), the order no longer appears in the Pickup Orders counter; on the next Dashboard polling interval, the change will be reflected—reducing the counter and, if the counter is 0, dimming the indicator.

If a pickup order was filed for completing later, only the Filed Orders indicator lights up. Likewise, if a pickup order is for C.O.D., only the C.O.D. Orders indicator lights up.

C.O.D. Orders

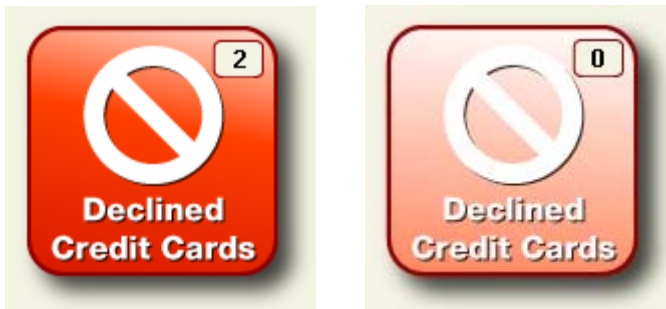
The C.O.D. Orders indicator lets you know how many orders in your shop are currently marked as C.O.D. for today's date. If an order is for C.O.D. and for pickup, only the C.O.D. Orders indicator lights up.

Figure 25-4: C.O.D. Orders Indicator (with and Without Items)

When there are orders marked as C.O.D. for today, the indicator appears in a bright green color and the number of orders appears at the top right of the indicator. When there are no C.O.D. orders remaining (that is, all have been completed), the indicator dims to a light green.

Declined Credit Cards

The Declined Credit Cards indicator displays the number of orders in your system where the credit card has been declined. As long as the order has not been canceled, the declined order will be included in the numerical indicator box at the top right of the indicator. Once the order is canceled, or the order is completed with different payment information, the declined credit card will no longer be reflected in the Dashboard.

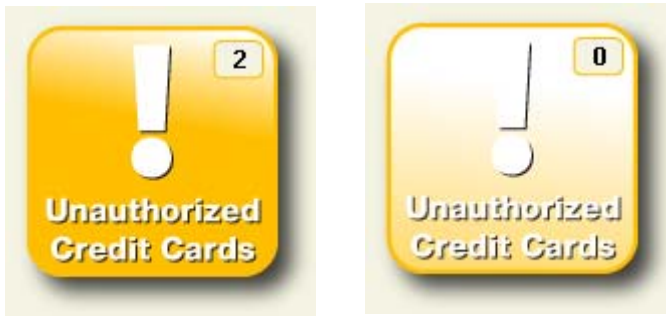
Figure 25-5: Declined Credit Cards (with and Without Items)

When there are orders with declined credit cards, the indicator appears in a bright red color and the number of orders appears at the top right of the indicator. When the orders have been processed with another payment method or cancelled, the indicator changes to a light red.

Unauthorized Credit Cards

The Unauthorized Credit Cards indicator displays the number of orders in your system that were paid for with credit cards where the credit card could not be authorized. This can happen if there are communication problems between your shop and the credit card authorization center. If this happens, you must resend the credit card transaction.

Once the transaction is authorized, or if the payment is updated or the order is canceled, the unauthorized credit card will no longer be reflected in the Dashboard.

Figure 25-6: Unauthorized Credit Cards (with and Without Items)

When there are orders with unauthorized credit cards, the indicator appears in a bright yellow color and the number of orders appears at the top right of the indicator. When all credit card authorization has taken place, the indicator turns a pale yellow.

Undelivered Orders

The Undelivered Orders indicator lets you know how many orders for today are undelivered. When orders are marked as delivered (either in the order itself, in Ticket Search, or in Mercury Delivery), the Dashboard will reflect the change.

Figure 25-7: Undelivered Orders (with and Without Items)

When there are undelivered orders for today, the indicator appears in a bright berry red color and the number of undelivered orders appears at the top right of the indicator. When all orders for the day have been delivered, the indicator turns to a light red.

Incomplete Orders

The Incomplete Orders indicator lets you know how many orders in your system are currently marked as incomplete. Perform a Ticket Search by Status to open these orders and complete them. If you complete or cancel an incomplete order, it will no longer be reflected in the Dashboard.

Figure 25-8: Incomplete Orders (with and Without Items)

When there are incomplete orders, the indicator appears in a bright blue color and the number of incomplete orders appears at the top right of the indicator. When there are no incomplete orders, the indicator dims to a light blue.

Filed Orders

The Filed Orders indicator lets you know how many orders are currently filed in your store. You should perform a Ticket Search by Status to locate filed orders and complete them or cancel them to reduce the Filed Orders count.

If an order for pickup today is filed, only the Filed Orders indicator lights up; the Pickup Orders indicator does not light up.

Figure 25-9: Filed Orders (with and Without Items)



When there are filed orders, the indicator appears in a bright purple color and the number of filed orders appears at the top right of the indicator. When there are no filed orders, the indicator dims to a light purple.

Communication Status Indicators

At the bottom of the dashboard, there are three communication status indicators:

- » [External Communication](#)
- » [Mercury Connection](#)
- » [Backup Status](#)

All status indicators are bright orange; changes in status are highlighted by the addition of a large red X over the icon when there is an issue.

External Communication

The External Communication indicator lets you know if there is an issue with external communication, which can affect fax operations, email, credit card processing, Mercury Messages, and wireless GPS. If there is an issue, the External Communication indicator will have a large red X over the icon.

Figure 25-10: External Communication Status Indicator (Normal and With Connection Problems)



Should there be a problem with external communication, you should try to relaunch external communications for FTD Mercury.

TASK **To relaunch external communications:**

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

If, after the next Dashboard refresh (polling interval), the External Communication indicator still has a red x over it, contact the Mercury Technology Assistance Center to resolve the problem.

Mercury Connection

The Mercury Connection status indicator monitors the connection of your server to the Mercury Network.

Figure 25-11: Mercury Connection Status Indicator (Normal and with Connection Problems)



If your system loses connection to the Mercury Network, the icon appears with a large red x over the icon. Should this happen, you should send a GENERAL message to FTD to see if that allows FTD Mercury to reestablish its connection to the Mercury Network.

TASK **To send a GENERAL message to check for Mercury Network connectivity:**

- 1 In FTD Mercury, on the **Mercury Message** menu, click **General (Gen)**. The **General Message Detail** window opens.
- 2 In the **Filling Florist** field, enter 90-5034AA for the florist code.
- 3 When a message appears stating 90-5034AA belongs to FTD, Inc. Transmit with this code? appears, click **Yes**.
- 4 From the **Priority** list, select **Express**.
- 5 In the **Text or Reason** field, enter Test for Mercury Connection.
- 6 From the **Operator** list, select your employee name.
- 7 From the **Sending Florist** list, ensure your store is selected.
- 8 Click **Send**.

A verified copy of the message should print out on your Mercury printer within a few minutes. If a verified copy prints, you have a connection to the Mercury Network. If the Mercury Connection status indicator indicates there is a problem after the next Dashboard refresh (polling interval), contact the Mercury Technology Assistance Center for help in resolving the issue.

Backup Status

The Backup Status indicator lets you know at a glance if your FTD Mercury backup is up-to-date. If the previous night's automatic backup did not take place as scheduled, the Backup Status indicator will have a large red x over the icon.

Figure 25-12: Backup Status Indicator (Normal and with a Backup Problem)



If the Backup Status indicator has a red x over the icon for two consecutive days, it indicates there is a problem with your backup. You should contact the Mercury Technology Assistance Center to resolve the issue.

Multi-Store Capabilities

Beginning with version 7.0, if you have multiple locations, FTD Mercury can accommodate all of your business needs. For example, you can do the following:

- » Enter orders for any customer, for any store (without having to log off the current user).
- » Search for customers associated with all stores, or a particular store.
- » View customer order history by store.
- » Associate products with particular stores.
- » Search for products at all stores or a particular store.
- » Generate statements for all stores or a particular store.
- » View statements generated by one or all stores.
- » Manually reconcile Mercury orders for all stores or an individual store.
- » Print reports for all stores or an individual store.

Adding New Stores to Multi-Store Environments

If you add a new store, by default all existing customers are associated with that store. In Order Entry and Point of Sale, you will not receive any error messages stating that the customer is not associated with the store. All customers can be shared across all stores, but the store of origin is the original store where the customer was created (see [Customer Store of Origin](#) on page 26–2).

For information on adding new stores, see [Adding Stores](#) on page 24–64

Employees and Multiple Stores

Employees have equal rights in all stores. When you set up an employee in FTD Mercury Administration, that employee's security settings apply at all locations. For information on setting up employees and issuing passwords, see [Managing Employees](#) on page 6–1.

Customers and Multiple Stores

There are several areas to consider regarding customers in multiple store environments:

- » [Customer Store of Origin](#)
- » [Order History by Store](#)

Customer Store of Origin

Each customer has a store of origin. The store of origin is the store where the customer was first added to the system. For customers that existed prior to upgrading to FTD Mercury 7.0, the system automatically assigns each customer 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 the store where the first sale took place. If a customer does not have any sales, then that customer is associated with the first store that was created on the system.

When you add a new customer to FTD Mercury, you must select a store of origin for the customer. By default, a new customer's store of origin is the currently logged in store. If you want the customer's store of origin to be a different store, select that store's name in the **Store of Origin** field before clicking **Save**. You can change this later if you edit the customer information.

The customer's store of origin also displays in the customer statistics area on the **Order Entry** and **Point of Sale** windows:

When printing the following reports, you are now prompted for the Store of Origin:

- » [Abbreviated Customer Master List with Balance Report](#)
- » [Abbreviated Customer Master List with Days Late Report](#)
- » [Aged Analysis Reports](#)
- » [Customer Master List](#)

You can select to print data for customers that originated from a particular store, or all customers at all stores.

Order History by Store

You can view order history by store. You can view a customer's tickets for an individual store, or you can view tickets for all stores.

When you perform a **Customer Search**, the **Order History** tab provides you access to the orders placed by the customer. You can view a customer's tickets for an individual store, or you can view tickets for all stores. Select the store from the **Store Name** list at the bottom of the window; by default, **All Stores** is selected. For each ticket listed, the store where the customer placed the order is listed in the ticket grid.

Statements in Multi-Store Environments

There are three main areas to consider with statements in multi-store environments:

- » [Statement Generation](#)
- » [Statement Search](#)
- » [Customer Statement History](#)

Statement Generation

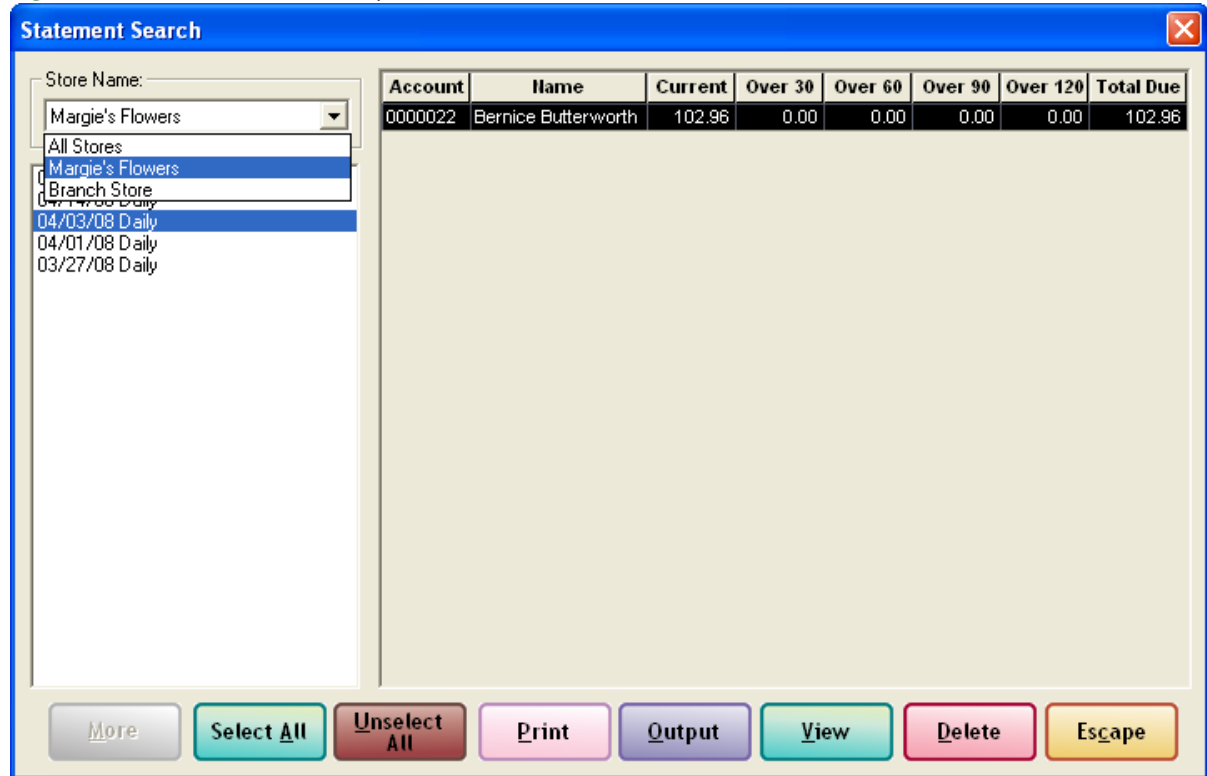
You can generate statements for a particular store or for all stores. If your customers should receive only one bill, regardless of where transactions were placed, you should generate statements for all stores. However, if you have separate locations and want to send customers separate bills from each location, you should generate statements for each store individually.

For more information, see [Generating Statements](#) on page 18-12.

Statement Search

When performing a **Statement Search**, you can view generated statements for all stores, or for each individual store.

Figure 26-1: Statement Search by Store



For information on searching for customer statements, see [Searching for Statements](#) on page 18–20.

The printed statement indicates at which store each transaction was completed. The product detail is followed by a slash (/), and then the store name is printed. For example, an invoice might contain the following information:

000127/1 Jenni fer Smi th Local Del i very Fresh arrangement / Karen' s Flower Shop

000241/1 Carry Out Bl oomi ng Pl ants / Doc' s Blooms

After the final slash, the store name is printed. In the first example, the customer purchased the fresh arrangement at Karen's Flower Shop. The second purchase was made at Doc's Blooms.

The name of the store that is currently logged in prints at the top of the statement.

Customer Statement History

When viewing a customer's statement history (via the **Statement** tab in the **Customer Detail Information** window), FTD Mercury lists the store where each statement was generated. The store where the statement was generated is listed in the **Store** column. If you generated statements for all stores, **All Stores** appears in the **Store** column.

Order Entry/Point of Sale

When working with multiple stores in Order Entry and Point of Sale, you can select the store where you are taking the order from the Store Name list at the top left of the window (this replaces the

Change User button in FTD Mercury versions prior to 7.0). The default selection is the store the employee is currently logged in to (the logged in store is displayed in the status bar at the bottom of the window).

If you perform a lookup, the store originally associated with the order remains on the order. However, if the order is updated, the store is updated to the store currently logged in to during the update.

The **Point of Sale** window has this **Store Name** field, but it is read-only and set to the logged-in store (as displayed in the status bar).

In **Point of Sale**, if a previously entered sale is updated with price-related changes, the sale becomes part of the current **Point of Sale** session and the store name is changed to the current store name. However, if you make changes that are not price related, the store associated with the sale is not changed. No Sale, Z-Out, X-Out, Paid In, Paid Out, and Receive Payment transactions are associated with the currently logged-in store.

Ticket Search

When performing a **Ticket Search**, you can search for a ticket based on the store where the ticket was generated, or search by all stores. The **All Stores** option is selected by default, and is available on all tabs in the **Ticket Search** window except for the **Sale** tab.

If you print **Ticket Search** results, the store name (or the store you are logged in to if you selected **All Stores**) is printed at the top of the report. Each ticket on the report displays the store in which it was generated. When printing, faxing, or emailing invoices from **Ticket Search**, the store name and address where the order originated appears on the invoice.

Product Codes and Product Search

When accessing **Product Search** from Order Entry or Point of Sale, only products associated with the store you are currently logged in to are displayed in the results list. You can select a different store or all stores when searching for products.

If you select a product code that is not associated with the selected store, you are warned with the following message:

The product code you have entered is not available at this store. Use anyway?

If you click **Yes**, you can use the product anyway. If you click **Associate product with all stores** and then click **Yes**, that product will not be placed in local inventory for all stores.

When you search for a product in **Product Search**, you can select the store you are searching from the **Store Name** list. If you select an individual store, only products associated with that store appear in the results list. If you select **All Stores**, you search all stores in your environment for the product.

By default, if you access **Product Search** from Order Entry, Point of Sale, or the Credit/Debit Memo window, the **Store Name** will be set to the currently logged in store. If you access **Product Search** from the **Search** menu, the **Store Name** will be set to **All Stores**.

In the **Product Entry** window, the **Stores** area displays a list of stores where the product is available. When you enter a new product, by default, the product is available for all stores. You can deselect individual stores if you want to limit the product to certain stores.

Wire Service Reconciliation

If you are running a multi-store environment, manual wire reconciliation can be performed on a store-by-store basis. In the **Manual Wire Reconciliation Filter** window, you can select the name of the store you want to reconcile, or you can select All Stores.

For more information, see [Manual Reconciliation](#) on page 17-4.

Reports

You can now generate most FTD Mercury reports for a single location, or all locations. Following are the business management reports that you can now generate for a single location, or for all locations:

- » [Abbreviated Customer Master List with Balance Report](#)
- » [Abbreviated Customer Master List with Days Late Report](#)
- » [Aged Analysis Reports](#)
- » [Business Snapshot Report](#)
- » [Credit Card Settlement History Report](#)
- » [Customer Account Payment Report](#)
- » [Customer Master List](#)
- » [Product Sales Reports](#)
- » [Sales Tax Report](#)
- » [Sales by Referral Code Report](#)
- » [Tax Exempt Customer Report](#)
- » [Ticket Report](#)
- » [Standing Order Log Summary Report](#)
- » [Sales Tax Report](#)
- » [Report of Orders Filled](#)

You can generate the following marketing letters for a single location, or for all locations:

- » [Delinquency Letter](#)
- » [Occasion Code Letter](#)

For the reports and letters listed above, the **Select Store** list now allows you to select **All Stores** so you can print data from all locations.

Remote Location Printing

If you have remote locations, you can select a default invoice printer for any of these locations. This allows you to enter an order for a remote store, and then the invoice is printed automatically at the remote store. The only requirements are that the printer must be on your store's network, and it must be set up in Windows (using the **Printers** screen in **Control Panel**).

For more information, see [Printing Invoices to Remote Locations](#) on page 9-70.

Web Order Interface

The Web Order Interface allows you to configure FTD Mercury so orders placed on your Web site are automatically converted to incoming orders in FTD Mercury. When an order from your Web site is sent to your email address, FTD Mercury retrieves that order and translates the email message into an incoming FTD Mercury order. You can then attach the order in Order Entry or Point of Sale.

How the Web Order Interface Works

The FTD development team has created a custom conversion program to work with your Web site and FTD Mercury. When installed, this conversion program allows FTD Mercury to interpret data from orders placed on your Web site and bring them into FTD Mercury.

To set up your system, you will give FTD Mercury the information it needs to access the Internet and your email account. The information your system will need is your Internet connection information, as well as the information for the incoming mail server for your email account and your email login and password. You provide this information so that the system can automatically connect to the Internet, access your email account, and retrieve the orders.

You will also configure your system so that it knows which orders to retrieve from your e-commerce email account. It is recommended that you only use the email account for orders. The system must know which messages are orders, and which are not. You will specify the subject line for the orders that are sent from your Web site to the email address. FTD Mercury only creates orders from email messages with this subject line.

FTD Mercury will be set up so that it automatically connects with the Internet and logs into your email account for a given time interval. The email messages then are translated into incoming orders in FTD Mercury. You will treat the orders just like regular incoming orders, and process the order as normal.

After the orders are retrieved from your email account, they are deleted from your email account. Therefore you will use Order Entry and Message Center to track your orders. If there is an error with an order, the order is sent to an alternate email address (you will specify this address during the setup process).

When a message is created for an order from WOI, FTD Mercury prints a copy of the message to your Mercury printer. If a company name is provided

Requirements for Your Web Site

Your Web site must meet a certain number of formatting, encryption, and setup requirements before you can set up the Web Order Interface. FTD provides your Web site designer a list of these

requirements so that he or she can make modifications to your Web site if necessary. See [Web Order Interface Web Site Requirements](#) on page 27-4 for a list of these requirements.

Setting Up the Web Order Interface

This section walks you through the Web Order Interface configuration process. It consists of the following steps:

- » [Before You Begin](#)
- » [Step 1: Confirm that the License Key is Valid](#)
- » [Step 2: Set Up Your Mail Server Information in Mercury Administration](#)

Before You Begin

Before you set up the Web Order Interface, you should clean out the inbox of the email address that receives Web orders. If you have order email messages in your inbox that have already been processed, you should delete these before setting up the Web Order Interface; otherwise these email messages will be processed in FTD Mercury and will result in duplicate orders. Orders that are not order-related will be forwarded to your Error inbox (which you will set up later), so you should also delete these before beginning.

Step 1: Confirm that the License Key is Valid

After you purchase the Web Order Interface feature, the Mercury Technology Assistance Center sends you a General (GEN) message that enables the features on your system. The first step is to make sure that the GEN message has turned on the features for you.

TASK To check that the module has been enabled:

- 1 Double-click **Mercury Administration** on your desktop.
- 2 Double-click the **Security** folder.
- 3 Click **License**.
- 4 Ensure **Web Orders** is **Valid**.

Step 2: Set Up Your Mail Server Information in Mercury Administration

After confirming the license key is valid, you must complete the incoming and outgoing mail server information in Mercury Administration.

You must enter your incoming mail server information in this screen so that Web orders can be retrieved from your email account. Your incoming mail server is the server that your Internet service provider (ISP) uses to manage your email account. If you have multiple email accounts where Web site orders are sent to, you can set up multiple incoming mail server accounts.

The outgoing mail server information is required because if there are any errors associated with Web order email messages, the email messages are sent to your error email address (which you will indicate in this screen).

TASK To access the Mail Server screen in Mercury Administration:

- 1 Double-click the **Communication** folder.
- 2 Click **MailServer**.

To complete this screen, you will need the help of your ISP's technical support department. Please refer to [MailServer Screen](#) on page 24–31 to learn how to complete the information on this screen.

How Messages are Retrieved from Your Email Account

FTD Mercury checks to see if there are any new incoming orders in your email account for the time interval that you specified in the Polling Interval field in the Mail Server option in Mercury Administration (see [MailServer Screen](#) on page 24–31). Below is the process that occurs when checking for new incoming orders:

- 1 FTD Mercury checks your email account for any new incoming email messages.
- 2 If there are incoming email messages, FTD Mercury checks to see if any email messages have the matching subject line that you specified in the Subject field in the Mail Server option in Mercury Administration.
- 3 If any email messages have a matching subject line, the email messages are removed from your inbox and translated into incoming FTD orders. At this time the order can be found in Message Center and is available to attach as an incoming order in Order Entry.

If any email messages subject lines that do not match, these email messages are forwarded to the error email account that you specified in the Send Errors To field in the MailServer Screen in Mercury Administration.

Processing Web Orders in FTD Mercury

TASK To process incoming Web Order Interface orders in FTD Mercury:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 From a blank **Order Entry** window, click **Message Center** to search for the incoming Web order. Incoming Web orders are listed as FTD IN orders.
- 3 Enter your search criteria and then click **Search**. From the results list, select the order you want to attach and click **Select**. The order populates the **Order Entry** screen.

NOTE

Web orders always have a status of "Exception" and a filling florist code of 90-0000AA. To search for Web orders in Message Center, change the Wire Service list to WEB and click Search.

- 4 The system attempts to locate the customer in your customer database. If it locates a customer, the customer's information is populated in the **Order Entry** screen. If a customer cannot be located, you are prompted if you want to add a new customer.

Consider the following:

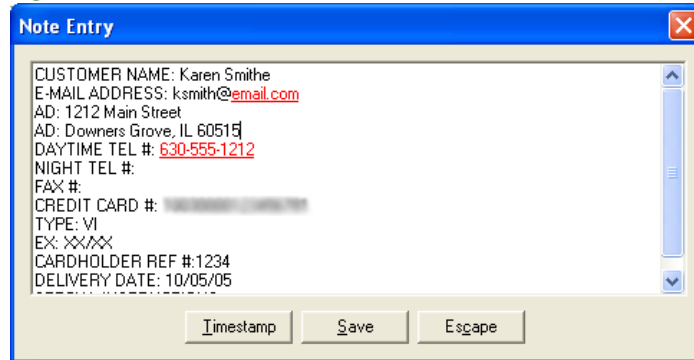
» **Order information is found in Order Notes**

The Web order information is located in Order Notes. Having the information in Order Notes allows you to access the information. However, Order Notes do not get printed on the invoice and do not get transmitted over Mercury if the order is sent as an outgoing Mercury order. (To learn how to send a Web order as an outgoing Mercury order, follow the steps outlined in [Creating a Wire Out Order from an Incoming Florists Online or Flowers All Hours Order](#) on page 9–26.)

To access Order Notes, click the **Order Notes** button in the Order Entry order screen.

Below is an example of how the Web order information is displayed in Order Notes:

Figure 27-1: Order Notes



» **An automatic Web Order adjustment is applied**

After the incoming Web order is attached in Order Entry and all automatic charges are applied (delivery zone fees, service charges, etc.), the new order total is validated. The new order total, after all automated processing and after line item taxes have been established, is compared to the original order total from the incoming Web order. If these values do not match, the non-taxable “Web Order Adjustment” product is added to the order to adjust the balance, positively or negatively, to ensure that the current order total matches the incoming Web order total. This “Web Order Adjustment” product has been added to your product database with a product code of ADJUST_WEB.

If you make any changes to the order (adding a customer discount or products for example), the Web order adjustment line does not change.

» **Discounts are listed (if applicable)**

A new product has been added to your system called “Website Order Discount,” with a product code of DISCOUNT_WEB. This product is treated like a coupon. Any discount amount coming from the Web order uses this product on a product line in Order Entry.

If a customer account is set up to receive discounts, you must add this discount manually.

- 5 Check the information in the Order Entry screen. Select the delivery zone if necessary. If the customer receives a discount at your store, you have to add this discount manually.
- 6 Click **Payment** to check the information on the Payment screen. The credit card information from the order is populated for you. If the customer placed the order on his or her house account, the house account is already selected.
- 7 Click **Save** in the **Payments** window.
- 8 Click **Complete** to complete the order.

Web Order Interface Web Site Requirements

This section will help you understand how to program your Web site so FTD Mercury can retrieve Web orders from your e-commerce email address. Give this information to your Web site designer before you set up the Web Order Interface.

General Requirements

- » **E-commerce Web site with SMTP capability and symmetric encryption capability.**
- » **A working Internet connection.**
- » **An outgoing SMTP server.** You can use FTD’s mail server or your own. This should be set up in Mercury Administration (see [MailServer Screen](#) on page 24–31).

- » **An email address for e-commerce Web orders.** The account must be accessible via POP3 or IMAP protocols from the Internet. If your ISP has any IP restrictions on which addresses are allowed to communicate with the mail server, then WOI will be unable to pick up these email messages.
- » **A separate email address for error reporting.** It is recommended that this address use the same incoming mail server as your e-commerce email address (for example, if your email address for Web orders is **orders@email.com**, it is recommended that your Web site for error reporting is **errors@email.com**). You do not have to use this email address for error reporting only (it can be used for personal use as well).

Field Requirements

The following table lists the requirements for fields on your Web site. Information about the contents of each column is provided below:

- » **Web Site Field**—This column lists the fields that FTD Mercury is able to interpret on your Web site.
- » **Requirements for Field**—This column lists the standards that your field must follow (if any) so that FTD Mercury can properly interpret the information. If no standards are listed, then there are no requirements for this field (the text will be copied into FTD Mercury “as is”).
- » **Number of Characters**—This column lists the maximum number of characters that FTD Mercury can use to obtain information. You may decide to allow your customers to enter more characters than what is listed here; however any number of characters that is greater than what is listed here will be lost.

Table 27-1: Field Requirements

Web Site Field	Requirements for Field	Number of Characters
Additional Information	Goes in Order Notes	1000
Bill Address1		100
Bill Address2		100
Bill City		30
Bill Country	USA or CND for example	3
Bill Fax Area Code		3
Bill Fax Number	Prefix plus phone number, or remaining phone number values	20
Bill Fax Prefix	Can be left blank	3
Bill Name	This field should list the person that is PLACING the order	50
Bill Phone Area Code		3
Bill Phone Extension	Must be SEPARATE field from Phone Number	4
Bill Phone Number	Prefix plus phone number, or remaining phone number values	20
Bill Phone Prefix	Can be left blank	3
Bill Phone2 Area Code		3
Bill Phone2 Extension	Must be SEPARATE field from Phone Number	4

Table 27-1: Field Requirements (cont.)

Web Site Field	Requirements for Field	Number of Characters
Bill Phone2 Number	Prefix plus phone number, or remaining phone number values	20
Bill Phone2 Prefix	Can be left blank	3
Bill State	2-digit abbreviation	2
Bill Zip Code		10
Business Name	Populates the company name for the recipient on the order.	50
Card Message		600
CC Cardholder	(Not Required.) This field should list the same name that is on the CREDIT CARD. If payment is to be applied to a house account, provide house account number.	30
CC Company	Credit card company that the number applies to (VISA, DISCOVER, etc.). If payment is to be applied to a house account, supply "INHOUSE"	10
CC CVV Code	Credit card security code (on back of card)	10
CC Expiration (Month)	2-digit number	2
CC Expiration (Year)	2- or 4-digit year	4
CC Number	Credit card number. If payment is to be applied to a house account, provide house account number.	20
Delivery (Day)	2-digit number	2
Delivery (Month)	2-digit number	2
Delivery (Year)	2- or 4-digit year	4
Delivery Charge	Can include the decimal or dollar sign	8
Delivery Instructions		250
Discount Amount	Can include the decimal or dollar sign	8
E-mail Address		50
Occasion Code	0 = None 1 = Sympathy 2 = Illness 3 = Birthday 4 = Business Gifts 5 = Holiday 6 = Maternity 7 = Anniversary 8 = Other	2
Product AmountX	Where X is the line item number of the product	8
Product CodeX	Where X is the line item number of the product	10
Product DescriptionX	Where X is the line item number of the product	350
Product QtyX	Where X is the line item number of the product	4
Recipient Address1		100

Table 27-1: Field Requirements (cont.)

Web Site Field	Requirements for Field	Number of Characters
Recipient Address2		100
Recipient City		30
Recipient Country Code	USA or CND for example	3
Recipient Name		100
Recipient Phone Area Code		3
Recipient Phone Extension	Must be SEPARATE field from Phone Number	4
Recipient Phone Number	Prefix plus phone number, or remaining phone number values	20
Recipient Phone Prefix	Can be left blank	3
Recipient Phone2 Area Code		3
Recipient Phone2 Extension	(Must be SEPARATE field from Phone Number)	6
Recipient Phone2 Number	Prefix plus phone number, or remaining phone number values	10
Recipient Phone2 Prefix	Can be left blank	3
Recipient State	2-digit abbreviation	2
Recipient Zip Code		10
Relay Charge	Can include the decimal or dollar sign	8
Retrans Charge	Can include the decimal or dollar sign	8
Service Charge	Can include the decimal or dollar sign	8
Tax Amount	Can include the decimal or dollar sign	8
Total Order Amount	Total order amount should be the total of all products, fees, and taxes minus any discounts. Can include the decimal or dollar sign	20

Special Instruction Tags for Preauthorized Credit Cards

FTD Mercury supports cards preauthorized via your Web site. When transmitting information to FTD Mercury, information is received in the special instructions for orders received from WOI. Credit card processing is not performed in FTD Mercury if an approval code is transmitted with a WOI order.

IMPORTANT These fields also apply to Florists Online (FOL) orders.

The following tags are available for preauthorized credit cards using WOI or FOL (you must have previously provided the credit card number, type, and expiration date to use these tags):

Table 27-2: Special Instructions Preauthorization Tags

Tag	Requirements/Notes	Characters
APPROVAL CODE	If this contains a value, the approval code is displayed in the Payments window for the order. The order will not be reprocessed unless the order total is changed.	1024 (AP, DECLINED, ERROR)
AVS RESPONSE	Must be either Y or N	1 (alpha)
CARD CODE	Always blank	
CARD CODE RESPONSE	Always blank	
CC MESSAGE	Stored in Order Notes	48
CLIENT REFERENCE ID		64 (alphanumeric)
RESPONSE CODE	AP or DC (approved or declined) or blank. NOTE: If this is blank and both Transaction ID and Client Reference ID are not blank, a query of CCAPI will be performed to receive the updated status. If this is blank and Transaction ID and Client Reference ID are blank, the order will be available for normal credit card processing in FTD Mercury.	2 (alpha)
TRANSACTION ID	CCAPI Transaction ID# (required if approval code exists)	9 (numeric)

Other Formatting Considerations

- » Because the Web Order Interface is doing key/value parsing of the email, the email must be in plain text. HTML or rich text formatted (RTF) email cannot be handled and will cause error.
- » Email messages with the given subject line that have been successfully processed will be deleted from the given email server. If the email causes an error of any kind, it will be forwarded onto the error email address configured in Mercury Administration. If the attempt to forward this email fails, the mail will be left on the email server.
- » Email messages that do not have the given subject line will be forwarded to the error email address provided in Mercury Administration.
- » Whether encrypted or not, everything should reside within the body of the email. If the email body is encrypted, it should be Base64 encoded (care should be taken by the Web developer to ensure correct line block length). Attachments will be ignored.
- » Do not use special characters, except in the email address (for example, do not use #, \$, %, ^, &, etc.).
- » If you are not using the Product Description field for a product description, enter the product code in both the Product Description field and the Product Code field.
- » If a field in the Web order form is unused, that field should still be included in the generated email.

- » Given the above table, a valid email body would look like this:

Bill Name: Joe Customer
 Bill Address1: 12345 Main Street
 Bill Address2:
 Bill City: Anytown
 Bill State: IL
 Bill Country: USA
 Bill Zip Code: 60515
 Bill Phone Area Code: 630
 Bill Phone Prefix: 555
 Bill Phone Number: 7890
 Bill Phone Extension: 1028
 ...etc.

NOTE

There is no space between the heading and the colon, and there is a space between the colon and the relevant information.

Encryption

- » Only a user-friendly password will be required for configuration by the user. This password will be used to generate both the key and initialization vector required by the encryption process.
 - » If the password is longer than necessary, it will be truncated to fit.
 - » If the password is shorter than necessary, it will be right padded with asterisks (*).
 - » The valid lengths that will determine truncation or padding are defined as being the maximum length allowed for each respective algorithm. Currently, those lengths are defined as follows:
 - » Valid key lengths:
 - DES - 8 bytes
 - RC2 - 16 bytes
 - Rijndael - 32 bytes
 - TripleDES - 24 bytes
 - » Valid IV lengths:
 - DES, RC2, TripleDES - 8 bytes
 - Rijndael - 16 bytes
- For example, the key and IV that should be used for a password of "flower," for example the TripleDES encryption algorithm:
- Key: "flower*****"
 IV: "flower**"

TripleDES: Since a weak key provided to TripleDES will cause an error, the FTD Mercury encryption library will predetermine whether or not the key is weak. If the key is found to be weak, encryption will be processed via the DES algorithm, not TripleDES. This will not impact the user in any way.



Credit Card Authorization Codes

The following table displays the credit card authorization codes you may receive when you process Global Payment Systems (NDC) credit card transactions.

Table A-1: Global Payment Systems (NDC) Credit Card Authorization Codes

Code	Verbiage	Description
000	AP	Approved or completed successfully.
001	CALL AE	Refer to American Express.
001	CALL CB	Refer to Carte Blanche.
001	CALL DC	Refer to Diners Club.
001	CALL DISCOVER	Refer to Discover.
001	CALL JB	Refer to JBS.
001	CALL ND	Call your Visa/MasterCard Voice Authorization Center.
001	CALL TC	Refer to TeleCredit.
001	CALL TK	Refer to TeleCheck.
001	CALL WC	Refer to Worldcheck.
001	CALL XXXXXXXXXX	Call indicated number.
001	ISSUER UNAVAIL	NDC cannot contact issuing bank for authorization.
003	INVLD MERCH ID	Invalid Merchant ID.
004	PIC UP	Authorization declined.
005	DECLINE	Authorization declined.
006	REVERSED	Requested transaction reversal was successful.
008	AP WITH ID	Approved with positive ID. NDC Host does not capture this transaction.
012	INVLD SERV ID	Service ID number is incorrect
012	INVALID REQUEST	Administrative message contains a syntax error.
012	INVLD TRAN CODE	Processing code entered is incorrect. Please refer to valid processing code.
013	INVLD AMOUNT	Amount entered is not valid.
014	INVLD ACCT	Account number does not pass issuer's edit checks.

Table A-1: Global Payment Systems (NDC) Credit Card Authorization Codes (cont.)

Code	Verbiage	Description
014	INVLD CODE ACCT	Valid account number matched with a transaction code for a different card type.
019	PLEASE RETRY	NDC's user tables are set up incorrectly for this account.
054	INVLD EMP DATE	NDC GATEWAY requests a retry.
055	PIN INVALID	Expired date entered is incorrect.
058	UNAUTH TRANS	Incorrect PIN entered.
075	MAX PIN RETRIES	A transaction code was used for which you are not setup on the Merchant Master File.
094	AP DUPE	Maximum PIN number entry attempts exceeded.
0N1	IN ACCT MATCH	Transaction entered is a duplicate.
0N2	INV AMT MATCH	The account number entered during a void or adjustment transaction does not match the account number stored in the NDC Host for that item.
0N3	INV ITEM NUM	The item number entered for a void or adjustment transaction is incorrect.
0N4	ITEM VOIDED ITEM REVERSED	An adjustment or item review was attempted on a transaction previously voided or reversed.
0N5	MUST BALANCE NOW	Terminal has not been balanced within time specified in the NDC Merchant Master File for this merchant.
0N6	USE DUP THEN BAL	Terminal has not been balanced within time specified in the NDC Merchant Master File for this merchant, but merchant is set up to perform extra transactions before balancing.
0N7	NO DUP FOUND	Override transaction is attempted on a non-duplicated transaction.
0N8	INVALID DATA	Format of the transaction is incorrect.
0NA	NO TRANS FOUND	Reversal transaction is attempted on a transaction that is not in the open batch on the host.
0NC	AP NOT CAPTURED	Approved but not captured (applied to only credit card transactions).
0NE	AP AUTH-ONLY	Approved but this EDC merchant is not set up to capture this card type (applies only to credit card transactions).
0NF	INV BANK	Acquiring Bank ID entered is incorrect.
0P0	TRAN TYPE INVLD	Transaction not supported by EFT network or EFT Group ID is incorrect.
0P1	APPROVED	Merchant is not set up for debit on NDC Merchant Master File.
0P2	DB UNAVAIL 02	NDC GATEWAY is down
0P3	DB UNAVAIL 03	NDC GATEWAY Link ID timed out.
0P4	DB UNAVAIL 04	NDC GATEWAY cannot contact EFT network or EFT Group ID is incorrect.
0P5	UNAUTH USER	Merchant is not set up for debit on NDC Merchant Master File.
0P6	INVALID CARD	Debit card not on issuer file.
0P7	DB ISSUER UNAVAIL	EFT network cannot contact issuer.

Table A-1: Global Payment Systems (NDC) Credit Card Authorization Codes (cont.)

Code	Verbiage	Description
0P8	INVALID POS CARD	Card is not eligible for POS.
0P9	ACCT TYPE INVLD	Type of account entered cannot be accessed (checking, savings, etc.)
0PA	INVALID PREFIX	No sharing arrangement for this card.
0PB	INVALID FIID	NDC GATEWAY Financial Institution ID not set up.
0S0	VERIFY XXXXXXXXXXXX	Match on SCAN file. XXXXXXXXXXXX is routing/transit number on the negative file.
0S1	INVALID LIC	The license or ID number entered during a check authorization transaction is incorrect.
0S2	INVALID STATE CD	State code entered is incorrect.
0T1	EDC UNAVAILABLE	EDC application down, try later.
0T2	DB UNAVAIL 01	Problem at NDC routing transaction.
0T3	SCAN UNAVAILABLE	SCAN application is down, try later.
121	EXCEEDS MAX AMT	Exceeds withdrawal amount limit.
123	EXCEEDS MAX USES	Exceeds withdrawal frequency limit.

State and Province Abbreviations

Your FTD Mercury system is set up so you may search for florists and facilities according to the state and country abbreviations.

U.S. State Abbreviations

Table B-1: United States State Abbreviations (and District of Columbia)

Abbreviation	State	Abbreviation	State
AL	Alabama	NE	Nebraska
AK	Alaska	NV	Nevada
AZ	Arizona	NH	New Hampshire
AR	Arkansas	NJ	New Jersey
CA	California	NM	New Mexico
CO	Colorado	NY	New York
CT	Connecticut	NC	North Carolina
DE	Delaware	ND	North Dakota
FL	Florida	OH	Ohio
GA	Georgia	OK	Oklahoma
HI	Hawaii	OR	Oregon
ID	Idaho	PA	Pennsylvania
IL	Illinois	RI	Rhode Island
IN	Indiana	SC	South Carolina
IA	Iowa	SD	South Dakota
KS	Kansas	TN	Tennessee
KY	Kentucky	TX	Texas
LA	Louisiana	USVI	US Virgin Islands
ME	Maine	UT	Utah
MD	Maryland	VT	Vermont
MA	Massachusetts	VA	Virginia
MI	Michigan	DC	Washington D.C.
MN	Minnesota	WA	Washington
MS	Mississippi	WV	West Virginia
MO	Missouri	WI	Wisconsin
MT	Montana	WY	Wyoming

Canadian Province Abbreviations

Table B-2: Canadian Province Abbreviations

Abbreviation	Province	Abbreviation	Province
AB	Alberta	NU	Nunavut
BC	British Columbia	ON	Ontario
MB	Manitoba	PE	Prince Edward Island
NB	New Brunswick	PQ	Quebec
NF	Newfoundland	SK	Saskatchewan
NT	Northwest Territory	YT	Yukon Territory
NS	Nova Scotia		

Puerto Rico Abbreviation

Table B-3: Puerto Rico Abbreviation

Abbreviation	Country
PR	Puerto Rico



Canadian Configurations

When converting an existing FTD Mercury system to take advantage of the new features provided in FTD Mercury 7.1 or later, you must perform the following configurations:

- 1 [Set the Store to Canada](#)
- 2 [Set and Verify Tax Codes](#)
- 3 [Configure Store Settings](#)
- 4 [Configure Wire Service Exchange Rate and Fill Order Multiplier](#)
- 5 [Configure and Update Delivery Zones](#)
- 6 [Associate Delivery Zone Fees](#)
- 7 [Configure Local Tax Rates for Product Fees and Charges](#)

Set the Store to Canada

For stores that were previously configured as U.S. shops, you need to set the store as Canadian.

TASK To make the store a Canadian shop:

- 1 In **Mercury Administration**, access the **General** screen.
- 2 In the **Country** area, select **Canada**.
- 3 Click **Apply** to save your changes before exiting this screen.
- 4 Exit **Mercury Administration** and FTD Mercury.

The next time you open Mercury Administration or FTD Mercury, the store will be set as a Canadian store.

Figure C-1: General Screen in Mercury Administration

Country: US Canada

How should reciprocity be handled?
 By \$ amount By count

Are you registered with Mercury as a multi-store?
 Yes No

Default Outgoing Message Processing
 Auto Forward No Auto Forwarding

Main Wire Code: 90-9085JW

Automatic Data Purge
Months to Hold: 255

Apply Undo

Set and Verify Tax Codes

Once FTD Mercury can identify the store as Canadian, you can proceed with other configurations, the most important of which are setting up tax codes. You need to set the federal and provincial tax code labels (used when creating new tax codes and in some reports), set the federal and provincial tax rates, and then set up tax codes for local orders, outgoing orders being sent to a GST province, outgoing orders for HST provinces, and outgoing orders for the United States.

Set Federal and Provincial Tax Code Labels

The federal and provincial tax code labels are used when generating reports, and also as the column headings in the Tax Code screen in Mercury Administration. You should ensure these values are set correctly.

TASK To set the federal and provincial tax code labels:

- 1 In **Mercury Administration**, access the **Tax Code** screen.
- 2 In the **Federal Tax Label** field, enter the label you want to use for the Federal tax. This should be **GST** or **HST**, depending upon your type of province.
- 3 In the **Provincial Tax Label**, enter the label you want to use for the provincial tax. This should be **PST** or **QST**, depending on your province.
- 4 Click **Apply** to save your changes before exiting this screen.

Figure C-2: Tax Code Screen with Tax Labels

Federal Tax Label:
 Provincial Tax Label:

Description	GST	PST	Rounding	Tax Code	Tax On Tax
Tax Exempt	0.000	0.000	4-5 Split	TE	<input type="checkbox"/>
Cash Sales	0.000	0.000	4-5 Split	CS	<input type="checkbox"/>
Interstate Commerce	2.000	0.000	4-5 Split	IC	<input type="checkbox"/>
Not Applicable	0.000	0.000	4-5 Split	NA	<input type="checkbox"/>
No Tax	0.000	0.000	4-5 Split	NT	<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>

Set Federal and Provincial Tax Rates

After you have configured the federal and provincial tax rate labels, you need to ensure your local tax rate is defined as a tax code with the correct federal and provincial tax percentages defined.

If your default tax code is already in the tax code grid, you need to ensure the tax percentages for federal and provincial taxes are correct.

TASK To set the correct percentages for the tax code you intend to use as your store default:

- 1 In **Mercury Administration**, access the **Tax Code** screen.
- 2 If the tax code you intend to use as the default is not already present in the grid, click in the blank row at the bottom and enter the name for it in the **Description** column. FTD recommends you name your default tax code as your province abbreviation with the words Sales Tax after it (for example, if your store is in Ontario, you should name your default tax code as ON Sales Tax).
- 3 In the column that has the same label as your **Federal Tax Label** (either GST or HST), enter the correct GST or HST tax percentage.
- 4 In the column that has the same label as your **Provincial Tax Label** (either PST or QST), enter the correct PST or QST tax percentage.
- 5 Click in the **Rounding** column and select the type of rounding you want to use.
- 6 In the **Tax Code** column, enter a two or three letter abbreviation for your tax code.
- 7 If your provincial sales tax should be applied on the federal sales tax, select the check box in the **Tax on Tax** column.
- 8 Click **Apply** to save your changes before leaving this screen.

Figure C-3: Tax Code Screen with Default Tax Rate

Federal Tax Label:

Provincial Tax Label:

Description	GST	PST	Rounding	Tax Code	Tax On Tax
Tax Exempt	0.000	0.000	4-5 Split	TE	<input type="checkbox"/>
Cash Sales	0.000	0.000	4-5 Split	CS	<input type="checkbox"/>
Interstate Commerce	2.000	0.000	4-5 Split	IC	<input type="checkbox"/>
Not Applicable	0.000	0.000	4-5 Split	NA	<input type="checkbox"/>
No Tax	0.000	0.000	4-5 Split	NT	<input type="checkbox"/>
QC Tax	6.000	7.500	4-5 Split	QTX	<input checked="" type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>

Add and Modify Tax Codes

You need to modify the tax code for orders that are sent to the United States, and you need to add additional tax codes for wire out orders sent to GST and HST provinces.

Modify the Tax Code for Orders Sent to the United States

The Interstate Commerce tax code is used for outgoing orders you send to the United States.

TASK To set the tax percentages for orders destined for the United States:

- 1 In **Mercury Administration**, access the **Tax Code** screen.
- 2 In the **Interstate Commerce** row, set the value of the federal sales tax (which will be labeled **GST** or **HST**) to 0.
- 3 Set the value of the provincial sales tax (which will be labeled **PST** or **QST**) to 0.
- 4 Ensure **Tax on Tax** is not selected.
- 5 Click **Apply** to save your changes before exiting this screen.

Figure C-4: Tax Code Screen with Interstate Commerce Rate

Federal Tax Label:

Provincial Tax Label:

Description	GST	PST	Rounding	Tax Code	Tax On Tax
Tax Exempt	0.000	0.000	4-5 Split	TE	<input type="checkbox"/>
Cash Sales	0.000	0.000	4-5 Split	CS	<input type="checkbox"/>
Interstate Commerce	0.000	0.000	4-5 Split	IC	<input type="checkbox"/>
Not Applicable	0.000	0.000	4-5 Split	NA	<input type="checkbox"/>
No Tax	0.000	0.000	4-5 Split	NT	<input type="checkbox"/>
QC Tax	6.000	7.500	4-5 Split	QTX	<input checked="" type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>

Create a Tax Code for Outgoing Orders Sent to GST Provinces

TASK

To create a tax code for outgoing orders sent to GST provinces:

- 1 In **Mercury Administration**, access the **Tax Code** screen.
- 2 In the blank row at the bottom of the grid, click in the **Description** column and enter GST with No PST.
- 3 In the column with the same name as the **Federal Tax Label** (either **GST** or **HST**), enter the correct tax rate for **GST** provinces.
- 4 In the column with the same name as the **Provincial Tax Label** (either **GST** or **PST**), set the value to 0.
- 5 Click in the **Rounding** column and select the type of rounding you want to use.
- 6 In the **Tax Code** column, enter GSTNPST.
- 7 Ensure the check box in the **Tax on Tax** column is not selected.
- 8 Click **Apply** to save your changes before exiting this screen.

Figure C-5: Tax Code Screen with GST with No PST Tax Code

Federal Tax Label:

Provincial Tax Label:

Description	GST	PST	Rounding	Tax Code	Tax On Tax
Tax Exempt	0.000	0.000	4-5 Split	TE	<input type="checkbox"/>
Cash Sales	0.000	0.000	4-5 Split	CS	<input type="checkbox"/>
Interstate Commerce	0.000	0.000	4-5 Split	IC	<input type="checkbox"/>
Not Applicable	0.000	0.000	4-5 Split	NA	<input type="checkbox"/>
No Tax	0.000	0.000	4-5 Split	NT	<input type="checkbox"/>
QC Tax	6.000	7.500	4-5 Split	QTX	<input checked="" type="checkbox"/>
GST with No PST	6.000	0.000	4-5 Split	GSTNPST	<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>

Create a Tax Code for Outgoing Orders Sent to HST Provinces

TASK

To create a tax code for outgoing orders sent to HST provinces:

- 1 In **Mercury Administration**, access the **Tax Code** screen.
- 2 In the blank row at the bottom of the grid, click in the **Description** column and enter HST with No PST.
- 3 In the column with the same name as the **Federal Tax Label** (either **GST** or **HST**), enter the correct tax rate for **HST** provinces.
- 4 In the column with the same name as the **Provincial Tax Label** (either **GST** or **PST**), set the value to 0.
- 5 Click in the **Rounding** column and select the type of rounding you want to use.
- 6 In the **Tax Code** column, enter HSTNPST.
- 7 Ensure the check box in the **Tax on Tax** column is not selected.
- 8 Click **Apply** to save your changes before exiting this screen.

Figure C-6: Tax Code Screen with HST with No PST Tax Code

Federal Tax Label:

Provincial Tax Label:

Description	GST	PST	Rounding	Tax Code	Tax On Tax
Tax Exempt	0.000	0.000	4-5 Split	TE	<input type="checkbox"/>
Cash Sales	0.000	0.000	4-5 Split	CS	<input type="checkbox"/>
Interstate Commerce	0.000	0.000	4-5 Split	IC	<input type="checkbox"/>
Not Applicable	0.000	0.000	4-5 Split	NA	<input type="checkbox"/>
No Tax	0.000	0.000	4-5 Split	NT	<input type="checkbox"/>
QC Tax	6.000	7.500	4-5 Split	QTX	<input checked="" type="checkbox"/>
GST with No PST	6.000	0.000	4-5 Split	GSTNPST	<input type="checkbox"/>
HST with No PST	14.000	0.000	4-5 Split	HSTNPST	<input type="checkbox"/>
	0.000	0.000	4-5 Split		<input type="checkbox"/>

Configure Store Settings

Once you have set up your tax codes, you need to configure settings for your store that are specific to Canadian shops.

TASK To configure store settings for a Canadian shop:

- 1 Open **Mercury Administration** and access the **Store Settings** screen.
- 2 Verify the store address.
- 3 Verify the province in the **Province** list is correct for your store's physical location.
- 4 From the **Default Tax Code** list, select the local default tax rate.
- 5 From the **Default Delivery** list, select the default delivery zone. This is optional.
- 6 In the **US Exchange Rate** field, enter the local currency exchange rate.
- 7 In the **GST ID #** field, enter your GST ID number.
- 8 Click **Apply** to save your changes before exiting this screen.

Figure C-7: Store Settings Screen

Store

Doc's Blooms of Québec Add... Edit...

4101, Sherbrook East
Montréal, QC H1X 2B2

Province: QUEBEC (QC)

Default Tax Code: QC Tax GST ID #: 123456789

Default Delivery: N/A US Exchange Rate: 1.20000000

Change Card Font

Arial, 16

Guarantee:

We have built an excellent reputation on beautiful flowers and prompt service. If we ever fail to meet your expectations, please let us know. We value you as a customer. It was a pleasure to give your order our personal attention.

Restore Default Guarantee

Apply Undo

Configure Wire Service Exchange Rate and Fill Order Multiplier

Wire service exchange rates and fill value multipliers are published in the Florist Directory provided by each wire service, and may be unique for each wire service. Each wire service provides the fill value multipliers for use in GST, HST, and Quebec provinces.

TASK To set the conversion rate and multiplier for a directory service:

- 1 In **Mercury Administration**, access the **WireServices** screen.
- 2 In the **Wire Service** area, select the wire service for which you are setting the exchange rate and conversion chart multiplier.
- 3 In the **Current Exchange Rate** field, enter the exchange rate percentage to use when converting U.S. funds to Canadian funds for the selected wire service. For FTD, you should get this value from the printed FTD Florist Directory.
- 4 In the **Conversion Chart Multiplier** field, enter the conversion rate multiplier for your province. For FTD, you can get this value from the printed Florist Directory.
- 5 Click **Apply** to save your changes before exiting this screen.

Figure C-8: WireServices Screen

Wire Service

FTD

Current Exchange Rate

Conversion Chart Multiplier

Wire Dollar Limit

Base Amount	Sender	Receiver	Wire Service
\$ 30.00	10.00	83.00	7.00
\$99,999.99	20.00	73.00	7.00

Configure and Update Delivery Zones

After you have configured store settings and exchange rates, you need to configure and update delivery zones so the correct taxes are applied to them.

Tax Hierarchy

FTD Mercury applies taxes for products based on a hierarchy. If the highest level in the hierarchy does not apply, FTD Mercury checks to see if the next level should apply.

Table C-1: Tax Hierarchy

Tax	Description
Customer	If the customer is tax exempt, all products and fees are considered tax exempt.
Product	If the product or fee has its own assigned tax code, this will be applied (as long as the customer is not tax exempt).
Zone	If a Delivery Zone tax code exists, use this delivery zone tax on the orders (except ones that have product taxes assigned to them or if the customer is tax exempt).
Store	If none of the other taxes apply, use the default store tax code.

Remove Tax Codes on Products

Beginning with FTD Mercury 7.1, there is no need to have taxes on product codes except for products that are always taxed at a single rate. For example, you may want to have product-based taxes on relay fees and service charges—which are always taxed at the local rate.

TASK To remove tax codes from all products:

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 Click **Remove All Tax Codes From Products**.
- 3 Click **Apply** to save your changes before exiting this screen.

Figure C-9: Delivery Zone Screen—Removing Tax Codes from Products

Zone Name	Delivery Type	ZIP Code	Active	Print Forms	Charge	Type	Tax Code
N/A	Carry Out	00000	<input checked="" type="checkbox"/>	<input type="checkbox"/>	\$ 0.00	Postal Code	
Wire Out	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	
Pick Up	Pickup	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	
Local	Local	60515	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 5.00	Postal Code	
Pool	Pool	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	
Test Address	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 5.00	Address	
Test Address	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Address	
Zone1	Local		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 6.95	Map	
Zone2	Local		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 8.95	Address	
	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	

Pool Address Apply Undo Remove Remove All Tax Codes From Products

Create Provincial Delivery Zones for Outgoing Orders


To ensure the correct taxes are applied for outgoing orders, you need to create delivery zones for each province (including for orders that are within your province, yet are outside of your local delivery zones, necessitating a wire out order). Depending on whether you are licensed for Mercury Delivery, there are two different procedures to follow to set up these wire out zones.

Creating Outgoing Provincial Zones for Mercury Delivery Users

FTD recommends that you use the provincial map zone utility to create a map zone for each province. With that in mind, FTD Mercury includes a utility that will create province map zones automatically.

TASK To use the provincial map zone utility to create province map zones:

- 1 Close **Mercury Administration** and **FTD Mercury**.
- 2 Click the **Windows Start** menu, point to **All Programs**, point to **Accessories**, and click **Windows Explorer**.
- 3 Navigate to the C: \Wi ngs directory and double-click **CreateCanadianMapZones.exe**.
- 4 At the prompt asking if you want to create the zones, click **Yes**.
- 5 When the utility finishes creating the map zones, click **OK**.
- 6 Open **FTD Mercury** and log in.

- 7 On the **FTD Mercury Main Menu**, click **Delivery**. **Mercury Delivery** opens.
- 8 On the **Zone Management** menu, click **Zones**. The **Create Zone** window opens.
- 9 In the **Zone Details** area, from the **Zone Name** list, select the zone that begins with **FTD-** and includes the province name where your store is located. For example, if your store is in Ontario, select **FTD-Ontario**.
- 10 Click **Delete**.
- 11 You receive a warning This will delete the zone permanently. Do you want to proceed? Click **Yes**.
- 12 When you receive a message that the deletion successfully occurred, click **OK**.
- 13 Click **Create Zone**. When you receive a message informing you that creating a zone will clear all fields, click **Yes**.
- 14 In the **Zone Name** field, enter **FTD-** and your province name (the same value you removed in step 9. For example, if your store is in Ontario, enter **FTD-Ontario**).
- 15 In the **Delivery Charges** field, enter any charges for this zone.
- 16 From the **Zone Creation Type** list, select **Map**.
- 17 From the **Delivery Type** list, select **Wire Out**.
- 18 Leave the **Delivery Tax Code** value blank; you will set this later (in [Editing Outgoing Provincial Zones](#) on page C-13).
- 19 Click the **Freeform** button ().
- 20 On the map, click a starting point for this zone. This should be right next to a point on one of your local delivery zones.
- 21 Using the freeform tool, draw a continuous line enclosing your province, but omitting your local delivery zones.
- 22 When you complete the drawing, double-click on the last point. You will see points throughout your line.
- 23 Click **Save**. Mercury Delivery will update your map. When it has finished, a message will appear. Click **OK**.
- 24 Click **Escape** to close the **Create Zone** window. You will receive a message that you need to restart all FTD Mercury clients before your changes take effect. Click **OK**.
- 25 Click **Escape** to close Mercury Delivery.

After using this utility, you need to assign the correct tax to each provincial zone created. This is covered in the [Editing Outgoing Provincial Zones](#) subsection of the [Create Local Zones and Edit Provincial Zones](#) section.

Creating Outgoing Provincial Zones for Users Without Mercury Delivery

If you are not a licensed Mercury Delivery user, you must create each province zone separately as a wire out zone.

TASK To create outgoing provincial zones when you do not have Mercury Delivery:

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 In a blank row, in the **Zone Name** column, enter the name of the province for which you are creating a wire out delivery zone (for example, **Ontario**).

TIP If you want to organize all of your provincial wire out zones together, begin each with the same letters. For example, you could prepend **WO-** to each province (resulting in **WO-Alberta**, **WO-Ontario**, **WO-Yukon**, etc.).

- 3 In the **Delivery Type** column, select **Wire Out**.

- 4 Leave the existing value in the **Zip Code** column. Because this wire out zone encompasses many postal codes, you will have to manually select this wire out zone when you are sending a wire out order to an address in this zone.
- 5 In the **Active** column, ensure the check box is selected.
- 6 In the **Print Forms** column, select whether you want to print an invoice when you send an order to this province by selecting or clearing the check box.
- 7 In the **Charge** column, enter a charge for sending to this delivery zone (if desired).
- 8 You will configure the **Tax Code** column later (in [Editing Outgoing Provincial Zones](#) on page C-13).
- 9 Repeat steps 2-8 for each Canadian province, including your own.
- 10 Click **Apply** to save your changes before exiting this screen.

You now need to assign the correct tax to each provincial zone created. This is covered in the [Editing Outgoing Provincial Zones](#) subsection of the [Create Local Zones and Edit Provincial Zones](#) section.

Create Local Zones and Edit Provincial Zones

IMPORTANT Your local province has no tax code assigned, so the store default tax code is used.

Creating Local Zones Without Overriding Tax Codes

When you create new local zones within your province, you should not assign tax codes to these zones (regardless of whether you create local zones in Mercury Administration or using the Delivery Module). By not assigning an overriding tax code to new zones within your province, the tax rate for your store will be used for these delivery zones.

Creating an Out of Country/U.S. Zone

You need to create a delivery zone for out of country wire orders, with the correct tax code assigned to the delivery zone.

TASK To create a delivery zone for wire out orders that are destined for the United States (or out of country):

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 Click in a blank cell in the **Zone Name** column and enter the name for the zone.
- 3 Click in the **Delivery Type** column and select **Wire Out**.
- 4 Ensure the **Active** and **Print Forms** columns have selected check boxes.
- 5 If you want to assign a delivery charge for that wire out zone, enter the charge in the **Charge** column.
- 6 In the **Tax Code** column, select the tax code **Interstate Commerce** (you modified this earlier).
- 7 Click **Apply** to save your changes before exiting this screen.

Figure C-10: Delivery Zone Screen with Out of Country Zone

Zone Name	Delivery Type	ZIP Code	Active	Print Forms	Charge	Type	Tax Code
Test Address	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Address	
Zone1	Local		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 6.95	Map	
Zone2	Local		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 8.95	Address	
FTD-ALBER	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-BRITISH	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-MANITO	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-NEW B	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-NEWFO	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-NORTH	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-NOVA	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-NUNAV	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-ONTARI	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-PRINCE	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-QUEBE	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-SASKA	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-YUKON	Wire Out		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
USA	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	Interstate ▼
	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	

Pool Address
Apply
Undo
Remove
Remove All Tax Codes From Products

Editing Outgoing Provincial Zones

For each outgoing provincial zone, you need to add a delivery charge and the overriding tax rate for each province.

Figure C-11: Delivery Zone Screen with Configured Zones

Zone Name	Delivery Type	ZIP Code	Active	Print Forms	Charge	Type	Tax Code
Test Address	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Address	
Zone1	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 6.95	Map	
Zone2	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 8.95	Address	
FTD-ALBER	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	GST with
FTD-BRITISH	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	GST with
FTD-MANITO	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	GST with
FTD-NEW B	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	HST with
FTD-NEWFO	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	HST with
FTD-NORTH	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	GST with
FTD-NOVA	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	HST with
FTD-NUNAV	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	GST with
FTD-ONTARI	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	GST with
FTD-PRINCE	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	GST with
FTD-QUEBE	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	
FTD-SASKA	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	GST with
FTD-YUKON	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Map	GST with
USA	Wire Out	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	Interstate
	Local	00000	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	\$ 0.00	Postal Code	

Buttons: Pool Address, Apply, Undo, Remove, Remove All Tax Codes From Products

IMPORTANT Do not add an overriding tax rate to your residing province.

For GST provinces, you should use the tax code you created for GST rate with no PST. The GST provinces are:

- » Alberta
- » British Columbia
- » Manitoba
- » Nunavut
- » Ontario
- » Prince Edward Island
- » Quebec
- » NW Territories
- » Saskatchewan
- » Yukon

For HST provinces, use the tax code create for HST rate with no PST. The HST provinces are:

- » New Brunswick
- » Newfoundland/Labrador
- » Nova Scotia

Note For call centers, overriding tax codes on outgoing zones may vary from the configuration above. Apply the appropriate tax rates to the zones.

Configuring an Wire Out Delivery Zones for GST Provinces

TASK To set the correct tax code for wire out delivery zones for GST provinces:

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 For a GST province (listed above) that has a value of FTD-PROVINCE (for example, FTD-ALBERTA), set the value of the **Tax Code** column to **GST with no PST**.
- 3 Repeat for all other GST provinces with labels beginning with FTD- ***except for your local province***.
- 4 Click **Apply** to save changes before exiting this screen.

Configuring an Wire Out Delivery Zones for HST Provinces

TASK To set the correct tax code for wire out delivery zones for HST provinces:

- 1 In **Mercury Administration**, access the **Delivery Zone** screen.
- 2 For a HST province (listed above) that has a value of FTD-PROVINCE (for example, FTD-NOVA SCOTIA), set the value of the **Tax Code** column to **HST with no PST**.
- 3 Repeat for all other HST provinces with labels beginning with FTD- ***except for your local province***.
- 4 Click **Apply** to save changes before exiting this screen.

Configuring Your Local Zone

You do not need to configure your local zone (step 3 in both of the previous procedures). Because of the tax hierarchy, if you do not configure local zone, the store default tax is used instead. See [Tax Hierarchy](#) on page C-9 for more details.

Associate Delivery Zone Fees

After you have created delivery zones and set up them up for wire out orders, you need to configure whether you want to charge a relay fee, a retrans fee, and/or a delivery charge automatically when you send a wire out order to each zone.

TASK To associate delivery zone fees with the newly created zones:

- 1 In **Mercury Administration**, access the **Delivery Zone Fee** screen.
- 2 For each zone you created, select whether you want to apply a relay fee and/or a delivery charge. Typically, all wire out zones will have both a relay fee and a retrans fee applied. You should only charge a retrans fee for Interstate Commerce (meaning orders sent to the U.S. will have a relay fee, a retrans fee, and a delivery charge). The relay fee is money for you to keep in a wire out transaction; the delivery charge is to help offset the cost of delivery for the filling florist and is transmitted to the filling florist along with the product amount.
- 3 Click **Apply** to save your changes before exiting this screen.

You can now close Mercury Administration.

Figure C-12: Delivery Zone Fees Screen

	Relay Fee	Retrans Fee	Delivery Charge
Wire Out	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Pick Up	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
FTD-ALBERTA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-BRITISH COLUMBI	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-MANITOBA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-NEW BRUNSWICK	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-NEWFOUNDLAND	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-NORTHWEST TER	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-NOVA SCOTIA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-NUNAVAT	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-ONTARIO	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-PRINCE EDWARD	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-QUEBEC	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-SASKATCHEWA	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FTD-YUKON	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
USA	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Configure Local Tax Rates for Product Fees and Charges

Fees associated with outgoing orders typically should be taxed at the local tax rate, as opposed to the tax rate for the destination province. Specifically, relay or service fees charged by the local florist should be taxed at the local rate. Retrans fees for out of country orders should be non-taxable fees. There may be other non-taxable products as well.

Because the tax hierarchy gives priority to the zone delivery tax over the store tax, you must apply a product tax code to the fee or charge to ensure FTD Mercury applies the correct tax (product taxes have priority over zone taxes).

Configuring Product Taxes for Relay or Service Fees

TASK To apply a product tax for relay or service fees:

- 1 On the FTD Mercury Main Menu, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 In the **Search Parameters** area, enter a term (such as fee) and click **Search**.
- 3 From the results list, double-click the fee for which you want to set the tax code. The **Product Entry** window opens.
- 4 From the **Tax Code** list, select the tax code you want to apply (should be your local tax).
- 5 Click **Save** to save your changes.
- 6 Click **Escape** to close the window.
- 7 Repeat steps 3–6 for any additional fees you need to modify.
- 8 Click **Close** to close the **Product Search** window.

Figure C-13: Configuring the Relay Fee

Product Entry

Local Product Code: RELAY Quick Pick

Product Name: Relay Fee

Price: \$0.00 Active

Premium Price: \$0.00 Deluxe Price: \$0.00

Quantity On Hand: 0 Monitor

Category: Fee

Occasion: -- All Occasions --

Statement Category: Relay Charge

Tax Code: GST with No PST

Image Description:

Size:

Section: Local Product

FTD Suggested Retail Price:

Wire Service Product Codes

Wire Service	Product Code
FTD	...
Teleflora	...

Include Product Code with Outgoing Order

Care Instructions:

Bar Code:

Stores:

Branch Store
Margie's Flowers

Recipe:

Qty	Item	Size	Color

Notes:

Configuring Taxes for Retrans Fees

Retrans fees for out of country orders need to be set as non-taxable fees.

TASK

To set the retrans fee as non-taxable:

- 1 On the FTD Mercury Main Menu, in the **Search** area, click **Product**. The **Product Search** window opens.
- 2 In the **Search Parameters** area, enter retrans and click **Search**.
- 3 From the results list, double-click the **Retrans** fee. The **Product Entry** window opens.
- 4 From the **Tax Code** list, select **Interstate Commerce**.
- 5 Click **Save** to save your changes.
- 6 Click **Escape** to close the window.
- 7 Click **Close** to close the **Product Search** window.

Figure C-14: Configuring the Retrans Fee

Product Entry

Local Product Code: RETRANS Quick Pick
Product Name: Retrans Fee
Price: \$0.00 Active
Premium Price: \$0.00 Deluxe Price: \$0.00
Quantity On Hand: 0 Monitor
Category: Fee
Occasion: -- All Occasions --
Statement Category: Service Charge
Tax Code: Interstate Commerce

Image
Description:
Size:
Section: Local Product
FTD Suggested Retail Price:

Wire Service Product Codes

Wire Service	Product Code	
FTD		...
Teleflora		...

Include Product Code with Outgoing Order

Care Instructions

Bar Code

Stores
Branch Store
Margie's Flowers

Recipe

Qty	Item	Size	Color
-----	------	------	-------

Notes

Taxation of Incoming Orders

After you have made the previous configurations, incoming order taxation is maintained by FTD Mercury, which applies taxes for the province defined in the Store Settings screen in Mercury Administration.



Debit Cards

Customers can use debit cards for order payment. However, the implementation is significantly different for U.S. and Canadian shops.

Debit Cards in U.S. Shops

In the United States, you can enter debit transactions in Order Entry and Point of Sale for accounting purposes. Simply select the **Debit** payment type, enter the account number, process the debit transaction with your current debit transaction device, and record the approval code in FTD Mercury.

When you generate the **Sales Summary** report, debit transactions are reported as a line item. Additionally, you can use the **Chart of Accounts Wizard** and **Balance Wizard** to create a chart of accounts and export debit card transactions to QuickBooks®.

For more information, see [Debit Card Payments](#) on page 9–31.

Debit Cards in Canadian Shops

FTD has recognized the large role debit cards play in Canadian commerce, and is proud to provide a comprehensive solution for debit transactions, including PIN pad hardware.

Before you can take advantage of PIN pad capabilities in FTD Mercury, you must have a high-speed Internet connection, purchase a debit card license from FTD, and purchase a PIN pad device from FTD.

The remainder of this chapter covers information on configuring and using debit cards in FTD Mercury on Canadian systems.

Configuring Canadian Systems for Debit Card Transactions

You must perform the following configurations prior to being able to use the FTD Mercury debit card processing functionality.

Hardware Configuration

Before you can accept debit card transactions, you must have installed the PIN pad device on your system. Consult the documentation included with your PIN pad device to ensure you connect it correctly to your computer.

IMPORTANT FTD strongly advises you only connect the PIN pad device to your Point of Sale computer when the computer is off.

After your PIN pad is connected, restart the computer. FTD Mercury will automatically recognize the presence of the PIN pad.

Mercury Administration Configuration

Once your PIN pad is connected and you restart your computer, you must access the **Debit** screen in Mercury Administration and configure settings for debit card transactions.

TIP If the Debit screen is not enabled in Mercury Administration, you are not licensed for debit cards in FTD Mercury. Contact Mercury Technology Sales at 1-800-767-3222 for information on how to purchase a debit card license and hardware from FTD.

TASK To configure FTD Mercury for debit transactions:

- 1 Open **Mercury Administration**.
- 2 Double-click on **Accounting**.
- 3 Double-click on **Debit**.
- 4 From the **Store Name** list, select the store for which you are configuring debit card processing. You must configure this separately for each store that will accept debit card transactions.
- 5 In the **HTML Code** field, enter the HTML Code value provided by Mercury Technology Sales.
- 6 In the **Developer Code** field, enter the Developer Code value provided by Mercury Technology Sales.
- 7 Click **Apply** to save your changes before exiting this screen.

You must restart FTD Mercury clients before debit card processing will be enabled.

Point of Sale Configuration

When you restart a client connected to the PIN pad device, open FTD Mercury and log in to the system. Then, on the **File** menu, click **Settings**, ensure **Process Debit Cards in POS** is selected and click **Save**.

If your system is licensed for debit card processing in FTD Mercury, the Point of Sale system will check for the presence of the PIN pad device each time Point of Sale is started. If the PIN pad device is not detected, FTD Mercury will warn you and disable debit card payments for the session; the Payments window will not allow you to select Debit as the payment type.

TIP You can disable the warning message in the FTD Mercury Configuration window.

Using Debit Cards on Canadian Systems

Most processes in accepting debit cards in FTD Mercury are the same as any other payment type. You still enter the order beforehand, however, the payment type will be **Debit** and your customer will use a PIN pad device to enter their account information and PIN number. Additionally, settlement of debit card transactions are immediate.

The following topics contain information about using debit cards on Canadian systems:

- » [Debit Card Payments in Point of Sale](#)
- » [Debit Card Payments in Order Entry](#)

- » [Splitting Payments](#)
- » [Debit Card Refunds](#)

Debit Card Payments in Point of Sale

When licensed for debit card transactions in Point of Sale using PIN pad hardware purchased from FTD, your customers can use their debit cards to pay for transactions. For the most part, the transaction is the same as any other purchase using Point of Sale.

TASK To use a debit card for a purchase in Point of Sale:

- 1 Enter the order as you would any other order in Point of Sale, and click **Complete**.
- 2 When the **Payments** window opens, fill it out as you would for other transactions.
- 3 If the customer is using other payment types in addition to their debit card (such as cash, checks, or gift certificates), enter these payments first in the payments area.

IMPORTANT FTD Mercury is unable to split payment between multiple debit cards or between debit cards and credit cards. Other payment methods (such as cheques, cash, and gift certificates) are valid payment types to split with debit cards.

- 4 On a blank line in the payments area, select **Debit** as the payment type. The **Account Number**, **Exp Date**, **Name**, and **Approval** fields become read only.
- 5 Ensure the **Tendered Amount** is correct. You cannot enter a tendered amount larger than the transaction total when you use a debit card (that is, you cannot give cash back when a customer uses their debit card).
- 6 Click **Complete**. An onscreen message appears, informing you that the transaction is processing.
- 7 Instruct your customer to follow the directions on the PIN pad device, including swiping their card, entering their PIN number, and verifying the total.
- 8 When the transaction has been approved, the approval code will automatically be entered in the payment grid in the **Approval** column for the debit card. A receipt will print.
If the card was declined, you will be informed via an onscreen message and you can then select a different payment type to use to complete the sale.
- 9 Click **Complete**.

Debit Card Payments in Order Entry

The Debit payment type is available in Order Entry, but does not use the PIN pad device nor does it attempt to receive authorization for the payment. You must use an external debit card processing device for authorization of debit card payments in Order Entry.

Splitting Payments

FTD Mercury does support splitting payments between different payment types. However, you cannot split a payment between two or more debit cards, or between a debit card and a credit card. If your customer is paying with a debit card and splitting payment, the other available payment types are check, cash, and gift certificate.

Debit Card Refunds

FTD Mercury does support refunds using debit cards. However, because debit card transactions are settled immediately upon authorization, you must enter a new ticket and select the (-) check box

for each item so it is marked as a refund. You must create a new order in Point of Sale; you cannot copy the existing order.

TASK To issue a refund on a debit card:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the **Customer** area, leave the field blank to use the default Point of Sale customer.
- 4 In the product area, in the **Product Code** column, type or scan the product code of the first product being returned. Alternatively, click the search button (...) to perform a product search.
- 5 In the **Qty** column, enter how many of this item the customer is returning and press **TAB**. The **Description** column automatically populates.
- 6 Depending on the product and customer configuration, the **Amount** and **Discount** columns may automatically populate; if they do not, or if you want to make changes, enter the correct values for the product amount and discount now. The **Extension** column automatically populates based on the values of **Qty**, **Amount**, and **Discount**.
- 7 Select the box in the (-) column to indicate this is a refund.
- 8 Click **Complete**. The **Payments** window opens.
- 9 In the **Payments** area, click in the **Type** column so that an arrow appears. Click the arrow and select **Debit**.
- 10 Click **Complete**.

The customer will need to enter their PIN number into the PIN pad device; once the transaction is complete, a receipt will print.

Reversal File

To assist in processing debit cards, FTD Mercury automatically creates a reversal file when it cannot complete a debit card transaction. FTD Mercury automatically searches for a reversal file when Point of Sale starts. If FTD Mercury detects this file, the system will automatically attempt to process the reversal file prior to displaying the Point of Sale window. FTD Mercury will also attempt to process the reversal file prior to allowing you to enter an opening balance for the day.

If FTD Mercury cannot process entries in the reversal file, you will receive a message on the receipt printer instructing you to contact the FTD Credit Card Department. The receipt will contain all entries in the reversal file that could not be processed.

Accounting Balance Report in Detail

If you are licensed for debit card transactions in FTD Mercury, the Balance Summary Report and Balance Wizard separate debit cards entered in Order Entry from those entered in Point of Sale. In the Summary By Credit Card Company section, there is a line item for Debit-OE which contains any transactions paid by debit card in Order Entry. A second line item named Debit-POS reports any orders entered in Point of Sale that were paid by debit card.

Approval and Declined Responses

During the debit card process, both the Point of Sale display and the PIN pad display will indicate whether the transaction was approved or declined. Additionally, reasons for declined transactions will appear on the bottom of customer receipts.

Some possible reasons for a declined or incomplete debit card transaction include:

- » Insufficient funds in the account
- » Incorrect PIN (follow the directions on the screen to allow the customer to reenter their PIN)

- » The transaction amount or refund amount exceeds the amount that can be processed
- » The customer used a credit card used instead of a debit card
- » Network problems, which can cause timeouts during transaction authorizations
- » The transaction was cancelled by the customer
- » Disconnected PIN pad

Bar Code Reader Configuration

This configuration is for the LS2208 bar code reader for use with the FTD Mercury Cherry keyboard in Point of Sale.

IMPORTANT Do not attempt to scan these bar codes on the monitor; it will not work. You must print the page out and scan it.

TASK To configure the LS2208 bar code reader:

- 1 Set the LS2208 defaults by scanning this barcode:



- 2 Scan the Scanner Emulation Host barcode:



- 3 Scan the 50 uS Module Width barcode:



- 4 Scan the Ignore Decode LED barcode:



- 5 Reboot your system.



Glossary

Throughout FTD Mercury documentation, as well as throughout FTD Mercury itself, there are a number of terms that may be unfamiliar to users. Some are technical terms, others are specific to the floral industry, FTD Mercury, or FTD itself. The following list of terms and their definitions is provided as a reference.

Table G-1: Glossary of FTD Mercury Terms

Term	Definition
Abbreviated Customer Master List with Balance Report	Report that provides you with a list of all of your customers and their current balance totals.
Abbreviated Customer Master List with Days Late	Report that provides you with a list of all of your customers and the number of days their payments are late.
Abbreviation Codes	Two- or three-letter codes entered in the card message field that designate common messages. Entries are prefaced by a backslash (\) (for example, \hb is converted to HAPPY BIRTHDAY!). The Abbreviation Code list is maintained in Mercury Administration.
ADJ Message	Allows you to report an error on the Outgoing Orders section of the combined report. Only the sending florist can send an ADJ message.
Administrator	Your store's computer system administrator. This person is often an owner or manager, who determines employee access to information as well as the status of other florists.
Aged Analysis Report	Report that provides you with an analysis of your customer account balances. This report is only available if you have purchased the Billing upgrade module.
ANS Message	Allows you as a sending florist who receives an ASK message to respond. If the ASK message is a price change request, you must respond with a new price.
ASK Message	Allows you to inquire about an order-related issue. Also allows you, as a filling florist, to request a price change.
Associated Florist	In the Facility Detail window, this is the list of florists that deliver to that particular facility.
Attach Incoming	An option in the Order Entry and Point of Sale windows that allows you to access incoming orders.
Attach Outgoing	An option in the Order Entry and Point of Sale windows that allows you to access outgoing orders.

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
Auto Forward	A field in Order Entry and Point of Sale that tells the system whether you wish to forward an order automatically to anyone other than the selected filling florist (if the filling florist cannot fill your order).
Auto Select	A feature that allows FTD Mercury to select a filling florist for you automatically. Taken into consideration are location of florist, reciprocity, and status.
Automatic Reconciliation	A feature that compares the data on your Combined Report diskette to the data in your FTD Mercury system. When loading the Combined Report file from diskette, your system will compare the orders from the diskette to the orders on your system and reconcile all orders that match automatically. This process verifies that you are paying and receiving the correct amount of money from the wire service.
Automatic Transmission	Automatic transmission priority. The Host Computer selects the most economical priority based on the delivery date and time zone of the filling florist.
Average Order	The total dollar amount of orders divided by the number of orders.
Backup	A process by which the system transfers data files stored on the hard drive to a zip disk, so that your data is "backed up" on the zip disk.
Balance Forward Accounting	Customers with this type of house accounts receive statements that show running unpaid balances. As payments are made, the payment account is applied to the oldest invoice.
Balance Wizard	A tool in the Mercury Accounting module that allows you to export your FTD Mercury data to QuickBooks.
Batch Mode	A program function that allows you to complete a message or authorization, click Send, and the window will remain open for the next entry.
Billing Cycle	The frequency of billing (for example, monthly).
Bi-Monthly Directory Updates	The Florist Directory is updated twice every month, and can be downloaded via the Mercury Technology Software Update application.
Both Routed and Non Routed Orders Report	Report that includes routed and non-routed orders for a particular delivery date. This report is available only if you have the Mercury Delivery module.
Business Snapshot Report	Report that provides you analysis of your business for a given date range. Four different cross-sections are included: Sales, Delivery, Products, and Wire.
Button	An on-screen button is a shortcut, or it further executes a program. A button is usually a square or rectangle and consists of words, pictures, or both.
CAN Message	Allows you to request that a filling florist or the Host Computer cancel a previously sent message by your shop.
Cash-Flo	An FTD program that allows you to process all your credit card payments through your own terminal and deposits your credit card transactions directly to your bank account. For more information, call Member Services at 1-800-788-9000.

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
Check Box	A box next to information that, when checked, indicates the information is true.
Clearing House	The FTD Clearing House is responsible for working with Members on the payment of their statements and outstanding balances.
Click	This is an instruction to press and release the left mouse button one time, quickly. Clicking on an item allows you to select the item. To click on an item: (1) position the pointer on the item using the mouse, (2) press the left mouse button once to select the item, and (3) release the mouse button.
Close City Match	A search function that will list city names spelled very much like the one you entered. The Close City Match window will appear with such a list if it cannot match the city you have entered during a Florist Search.
Closest City Search	A search function that allows you to search for a city closest to any city in the United States. You may need to perform a Closest City Search if there is no Mercury florist in the recipient's city.
Combined Report	This is a Clearing House report confirming your store's incoming and outgoing orders each month.
CON Message	Allows you to send a message to a sending florist to confirm their CAN message.
Configuration Wizard	See Store Setup Wizard.
Credit Card Settlement History Report	Report that lists credit card settlement for the given date range. The report also includes the settlement number, date, approval or error codes, and dollar amounts. This report is available only if you have the Credit Card module.
Credit Memo	Credit memos allow you to apply credit toward a customer's house account. You may need to apply the credit if a customer returns an item purchased on a house account.
Customer Account Payment Report	Report that lists all payments made on house accounts in a given date range. This report is available only if you have the Billing upgrade module.
Customer Master List	Report that provides you a list of all of your customers, as well as their current balance information, and house account information such as their credit limit and discount account.
Customer Name	Name of the person or organization placing an order.
Customer Search	A search in FTD Mercury that allows you to locate customers in your FTD Mercury system.
Data	Information of any type that is stored in an electronic file, such as a customer database file.
Data Files	Files containing information utilized by the program.
Data Processing Center	Division of FTD Headquarters which, for billing purposes, automatically reports incoming orders processed through the Mercury Network.
Database	A collection of data stored and organized especially for rapid search and retrieval. For example, your FTD Mercury system stores your product information in a product database.

Table G-1: Glossary of FTD Mercury Terms (cont.)



Term	Definition
Debit Memo	Debit memos allow you to apply a debit toward a customer's house account. You may need to apply the debit to add a miscellaneous charge onto the customer's house account.
Default	A setting that is assigned automatically by the system and remains in effect unless changed manually.
Delivered Orders Report	Report that includes all orders that have been marked as delivered for a particular delivery date. This report is available only if you have the Mercury Delivery module.
Delivery Code	Allows you to flag an order as either delivered or not delivered.
Delivery Priority Code	Custom delivery codes to use in Order Entry and Point of Sale. These codes designate when an order should be delivered.
Delivery Problem Report	Report that includes orders that have not been delivered due to a delivery problem (customer not at home, order refused, etc.). This report is available only if you have the Mercury Delivery module.
Delivery Trip Analysis Report	Report that includes delivery trip statistics for each delivery driver, such as total trips, percent trips complete, total miles traveled, and total time traveled. This report is available only if you have the Mercury Delivery module.
Delivery Zone Report	Report that includes the number and total dollar amount of deliveries per delivery zone for a given date range. This report is available only if you have the Mercury Delivery module.
Delivery Zones	Used to help you route your deliveries and automate delivery charges in Order Entry and Point of Sale.
DEN Message	Allows you to send a message to the sending florist to refuse their CAN message.
Design Center	The window in FTD Mercury where you assign products to designers and mark orders as designed.
Design Picture	A picture attached to an order which displays the product created. This picture is not sent externally.
Desktop	The visual work area that fills your screen.
Directory	See Florist Directory.
Double-click	An instruction to push down the left mouse button two times, quickly. Double clicking an item allows you to open a file, folder, or execute an option. To double-click an item: (1) position the pointer on the item using the mouse, and (2) quickly press and release the left mouse button twice.
Down Arrow	The down arrow  is used to open a drop-down menu or calendar.
Drop-Down Menu	A list of options, opened by clicking  (the down arrow).
Dunning Messages	Payment reminders that appear on customer statements. You can set up messages for customers who are current with their statements, 30 days late, 60 days late, 90 days late, and 120+ days late. You can create dunning messages in Mercury Administration.

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
Economy Transmission	Economy transmission priority. The order or message is processed by 8:00 a.m. the following day. If the order is relayed through call forwarding, it will be received by 10:00 a.m. the following business day. (The times 8:00 a.m. and 10:00 a.m. refer to the local time of the filling florist.)
Edit Outgoing	An option in the Order Entry window that allows you to send an order as a Mercury Order message.
Email	Electronic mail. A way of sending other people messages from your computer.
Employee Analysis Report	Report that allows you to print productivity reports for your clerk designer, and driver employee types.
Employee Sales Report	Report that provides an order count and total dollar amount of orders for each employee for a given date range. This report is only available if you have either the Billing, Order Entry, or Point of Sale module.
Express Transmission	Express transmission priority. The order or message will be processed immediately.
F1 Help	A help program that is accessed by pressing the <F1> key. F1 help is context sensitive; it displays a help page for the window you are working in (the active window).
Facility	A delivery site such as a hospital, funeral parlor or nursing home.
Facility Search	Search that allows you to locate a facility, such as a hospital, nursing home, or funeral home.
FAH	See Flowers All Hours.
Fax and Email Monitor	Application that allows you to monitor outgoing faxes and email messages sent from FTD Mercury.
Field	Individual work screen lines allowing you to enter data or choose listed options.
Field Help	A help system in FTD Mercury that is accessed by right clicking on a field or by pressing the <Ctrl> and <F1> keys simultaneously. Field Help displays a small pop-up window that gives you information on how to complete a particular field. To access field help in the Mercury Administration program, right click or press the <Shift> and <F10> keys simultaneously.
File	A computer document.
File Name	Letters or numbers assigned to identify a file.
Filling Florist	The florist who receives an order message and fills the order.
Finance Charge	A charge that is applied to a house account that is past due. You can set up default finance charges for house accounts in Mercury Administration). Or, you can specify a finance charge for individual customer accounts.
Finance Grace Period	The period of time that you would like the system to wait before applying finance charges to a house account.

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
First Choice Status	A florist status type. Marking florists First Choice will choose them automatically when using the Auto Select option and sending an order to that florist's city. A florist's status may be changed in the Florist Search or Florist Detail window.
Floral Order Relay Center	The division of FTD Headquarters which handles orders and order-related messages by telephone to Members with temporarily inoperative systems.
Florist Code/ID	A code number assigned by a wire service to identify each store. Each wire service's number format is different and a single store will have different florist codes for each wire service to which they subscribe.
Florist Directory	A directory containing FTD member florists, including their addresses, phone numbers, and minimum ordering information. You can access florists from the directory by performing a Florist Search.
Florist Search	A search in FTD Mercury that allows you to locate florists in the Florist Directory.
Florists Online	The Floral Industry's Leading E-Commerce Solution! See http://www.ftdi.com/ftdfloristsonline/default.htm for details.
Flowers All Hours	A service which provides Members' stores and customers with 24-hour telephone service. See www.ftdi.com/flowersallhours for details.
FOL	See Florists Online.
Folder	A structural device for representing the location of files. A folder may contain other folders.
FOR Message	Enables you as the selected florist to forward an order received on your system to another Mercury member for delivery.
FTD International Retrans Service	Allows Members to send flowers to virtually anywhere in the world. FTD International Retrans Service receives your order, prepares it for dependable delivery, and transmits it to the appropriate country.
FTD Reporter	The program that manages your printers.
FTD Startup	The program in the system that starts the server and FTD Reporter (printer communications).
FTO Transmission	Toll free transmission priority. If possible, the Host Computer selects the most economical priority based on the delivery date and time zone of the filling florist.
Funeral Log	Allows you to track funerals and quickly enter them as recipients in Order Entry and Point of Sale.
GEN Message	Allows you to communicate with other Mercury Members and FTD personnel. The GEN message does not link with an order or order-related message in Mercury history.
General Ledger Export	The process by which your store transactions are sent to accounts you have created in third party accounting software.
Gift Cards	Plastic cards onto which you can load values for your store. Customers can use gift cards as a payment type.
Goods and Services Tax	See GST.

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
GST	Acronym for Canada's Goods and Services Tax. This tax type is only collected on products and delivery for the province in which the products are delivered.
Harmonized Provincial Sales Tax	This tax is a combination of the Canadian Goods and Services Tax (GST) and the Provincial Sales Tax (PST). This tax applies to Nova Scotia, New Brunswick, and Newfoundland. GST is included in this tax type.
Host Computer	The FTD computer that routes the orders sent from a sending florist to a filling florist.
House Account	Allow a customer to run a monthly balance at your store so they may charge products and services and receive statements.
HST	See Harmonized Provincial Sales Tax.
Icon	A small picture that represents a program or a shortcut to a program. When you double-click on an icon, the program starts.
Incoming Message	A message sent to your store by another florist.
Input Auto Select	This occurs when the filling Member selected by the sending Member is closed or not accepting orders. Upon receipt of the order, the Host Computer automatically selects a new filling Member, based on the city server, not on the zip code.
Interflora	An Interflora order is an order for flowers, plants or other floral related items, with or without gifts, with its value specified in fleurins, exchanged between two active Members belonging to two different groups of Interflora, Inc.
Job Function	A short description of the job types at your store (for example, "clerk" or "designer").
Jump	An item in an Online Help system that, when clicked on, takes you to another help page. Jumps are displayed as blue text underlined once in blue.
Key	A single button on the keyboard.
Keyboard	The device you use to enter data into a program on your computer.
Keyword	A word related to the term you are searching for in an Online Help program. For instance, if you were looking for information on Slimcast Message procedures, you could enter the word "Slimcast" as a keyword.
Log	See Message Log.
Login Name	The name an employee enters in order to login to FTD Mercury. The login names and login IDs are issued in the Employee window of the Mercury Administration program when adding employees for the first time.
Mail Merge	Importing data into a word processing program for marketing purposes. With mail merge you may personalize form letters; print addresses on envelopes and mailing labels; and produce other marketing documents.
Main Menu	The window that appears when you log into the FTD Mercury software. The FTD Mercury Main Menu contains 10 items that will take you to commonly-used areas of the program.

Table G-1: Glossary of FTD Mercury Terms (cont.)


Term	Definition
Manual Reconciliation	An alternative to automatic reconciliation, manual reconciliation allows you to compare the orders on your printed Combined Report to the orders on your FTD Mercury system. This process verifies that you are paying and receiving the correct amount of money from the wire service.
Maximize	To increase window size to original size or the size of the screen. To maximize a window, either double-click the window's title bar, or click  in the upper right corner of the window.
Menu	A list of program options. When you click on a menu item, that function is available to you.
Menu Bar	A Menu Bar is a collection of menus in a program. The bar can be used as an alternate way of accessing the functions On the FTD Mercury Main Menu.
Mercury Administration	A program in your FTD Mercury software that determines certain program defaults and settings, such as your delivery zones and house account defaults.
Mercury Component System	The Mercury Component System is the distributed system of computers in FTD Member stores.
Mercury Host Computer	The computer at FTD Headquarters which processes orders and messages and sends them on to Members.
Mercury Messages	Mercury messages have been established to help communication among FTD Members and with FTD Headquarters and your FSR. The various message types perform several business functions including placing orders, processing product orders through Marketplace, and administering billing activity.
Mercury Network	A communications network developed for FTD Members. It consists of two key elements: the Mercury Component system and FTD Headquarters in Downers Grove, IL.
Mercury Number	A system-assigned number for each Mercury message.
Mercury Sales Department	Division of FTD Headquarters which can fill orders for new equipment or can answer questions as to what equipment would best suit your store. You can reach this department between 7:00 A.M. and 5:00 P.M. Central Time at 1-800-669-1000. You can also send a free general (GEN) message to 90-4664AA.
Mercury Technology Assistance Center	Division of FTD Headquarters which can answer questions and help Members find solutions to their problems. Members can contact the Mercury Technology Assistance Center by dialing 1-800-669-1000, or by sending a free general (GEN) message to 90-5034AA.
Message Center	A function in your FTD Mercury program that allows you to search for incoming and outgoing messages..
Message Log	A list of Mercury messages that have been sent from or been received by your shop. The Message Center serves as this log.
Message Report	Report that lists all orders and messages that you have sent or received in a given time period.

Table G-1: Glossary of FTD Mercury Terms (cont.)


Term	Definition
Minimize	Sending a window to the task bar. To minimize a window, click  in the upper right corner of the window.
Minimum Finance Charge	The minimum charge you would like added to overdue accounts.
Mouse	A hardware item used to navigate by “point and click” navigation through a program. A mouse replaces the need to use navigation keys on your keyboard such as the arrow keys, the <Tab> key, and the spacebar. The mouse allows you to select menus easily, click on items (graphics, fields), move the cursor to a different location, or to drag and drop graphics and files.
MTAC	See Mercury Technology Assistance Center.
Multi Store	A store setup category that allows you to set up more than one store. Each store will have a completely separate customer base. All aspects of bookkeeping must be done separately. However, the physical bookkeeping can be consolidated at a central location or maintained individually by each store.
Navigate	The process of opening and closing drives and folders in Windows to find what you are looking for.
No Auto Forward	See Auto Forward.
No Sale	A Point of Sale transaction that is used when you must open the cash drawer without taking out or adding in money, for example, making change for a customer.
Non Routed Orders Report	Report that includes all orders that have not been routed for a particular delivery date. This report is available only if you have the Mercury Delivery module.
Normal Status	A florist status type. By default, all florists are marked Normal. A florist’s status may be changed in the Florist Search or Florist Detail window.
Normal Transmission	Normal transmission priority. The order or message will be processed within 90 minutes. This time period is extended during major floral holidays.
Not Preferred Status	A florist status type. This status type indicates to the program to never select this florist to fill an order when using the Auto Select option. A florist’s status may be changed in the Florist Search or Florist Detail window.
Online Help	A help program, usually titled Help Topics, that is located in the software’s Help menu. This program allows you to search for procedures and troubleshooting guidelines. FTD Mercury, the Mercury Administration program, and Microsoft Windows each have their own Online Help systems. To access FTD Mercury Online Help, select Contents from the Help menu.
Open Item Accounting	In this type of account, as each payment is made, it is applied to an individual ticket. Typically used by companies or customers who pay by invoices.
Opening Balance	The amount of money that is in the drawer at the start of a Point of Sale session (usually the amount of money that is in the drawer when you begin the day).

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
Operator	The name of the employee completing the transaction or message.
Outgoing Message	Messages sent from your store to another florist.
Paid Out/Paid In	A transaction that is used to take money out of or put money in to the cash drawer, but is not a sale.
Password	An access code used to access the FTD Mercury system. Passwords are assigned in the Employee window of the Mercury Administration program when adding an employee to your system.
Payment Type Totals Report	Report that lists all payments made by your customers within a specified date range. This report is available only if you have the Billing upgrade module.
Phoned In	An option in the Order Entry and Point of Sale windows that allows you to enter orders phoned in from other florists.
Point of Sale Session	A series of transactions on one Point of Sale terminal that begin with an opening balance and end with a z-out.
Pointer	A small, white arrow on the screen that follows the direction of your mouse. The pointer can be a number of things. For example, it can be a small vertical line that blinks (cursor) that allows you to enter text, an hourglass (indicating wait time), a small white hand (indicating an object can be moved), a double-sided black arrow (indicating an object can be resized), or a cross (also indicating an object can be moved).
Pop Up	An item in an Online Help system that, when clicked on, displays a small window containing more information on that item. Pop ups can be identified in online help systems as blue text with a blue underline.
POS	Point of Sale.
Preferred Status	A florist status type. When you mark a filling florist Preferred, the likelihood of the program selecting this florist during an Auto Select is increased. Marking a florist "Preferred" also brings the florist to the top of your lookup screen when performing a Florist Search.
Product Code	An abbreviation consisting of numbers and letters assigned to each product you sell in your store. Product codes help your FTD Mercury system track which products are being sold in your store. Wire service branded products are assigned product codes automatically.
Product Comparison Report	Report that allows you to view a sales comparison of two date ranges or the same date range for two stores.
Product Sales Report	Report that provides you with an analysis of which products are selling and how many are being sold either in-house, outgoing, or both.
Product Search	A feature of your FTD Mercury software that allows you to search for a product's detail information.
Prompt	A message that requests or gives information. A typical prompt is: You have received a message.
Provincial Sales Tax	Also known as PST. Canadian provinces other than Quebec and Prince Edward Island charge this tax before applying Goods and Services Tax (GST) to a sale.
PST	See Provincial Sales Tax.

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
QST	See Quebec Sales Tax.
Quebec Sales Tax	Also known as QST. Provincial sales tax for order originated or received in Quebec.
Reason Codes	A reason for sending a message (for example, "Customer Cancelled Order" may be a reason code for a CANCELLATION message). Reason codes are maintained in the Mercury Administration program.
REC Message	Reports incoming orders phoned, faxed, or received in your shop through means other than the Mercury Network. A REC message should be sent for every incoming order that is not received over the Mercury Network.
Recipient	The person who will receive the order.
Recipient Pictures	Pictures you attach to an order and send to customers.
Reciprocity	The Host Computer's attempt to send an equal number of orders or total value of orders between stores.
Reciprocity Report	Report that provides you with an analysis of your reciprocity statistics by wire service.
Reconciliation	See Wire Service Reconciliation.
Referral Code	A code that helps you determine how customers hear about your shop. Referral codes are maintained in the Mercury Administration program.
Referral Codes	Used to explain how a new customer first heard about your store, such as through a newspaper ad, word of mouth, or a friend.
REJ Message	Allows you to reject an order sent by another Mercury member.
Report of Orders Filled	Report that lists all incoming orders that you filled and entered in FTD Mercury in a given date range. The report also provides the grand total number of orders filled, and the dollar amount associated with the orders. This report is available only if you have the Billing, Order Entry, or Point of Sale module.
Reprint Route Report	Report that includes the route information for a saved route. It includes each order in the saved route, stop numbers for each order, delivery zone, recipient information, product information, and priority. This report is available only if you have the Mercury Delivery module.
RES Message	Informs your system to accept orders, in addition to administration messages, earlier than the time specified when suspending your receiving capacity.
RET Message	Allows you to retrieve a copy of an order or message you previously received.
Retrans (International)	A service provided by FTD for international orders that will convert language and costs between countries.
Right-Click	To press down the right mouse button once, quickly. A right click usually displays an additional menu.
Sales Analysis Report	A report that provides you with an analysis of which products are being sold in your shop.

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
Sales By Referral Code Report	Report that lists the total sales by referral code for a given date range. This report is only available if you have the Order Entry or Point of Sale modules.
Sales Summary Report	Report that lists the total sales summary for your store for a given date range. This report is only available if you have the Billing, Order Entry, or Point of Sale module.
Sales Tax Report	Report provides information to assist in completing the monthly sales tax report that you are required to file with your state. This report is only available if you have either the Billing, Order Entry, or point of Sale module.
Sales Tax Report	A report that displays all of the sales and tax paid on each product within a specific tax category.
Scroll	To cause text to move vertically or horizontally across the screen so a new line appears for each line that moves off the screen.
Scroll Bar	A bar that is used to move text across the screen. A scroll bar is found on the right side of vertical scrolling text and the bottom of horizontal scrolling text.
Second Choice Product	An optional product if the First Choice product is not available.
Select	To mark an option, check box, or item in a list by highlighting it with your mouse or keyboard. Selecting (or highlighting) an item does not start an action.
Sending Florist	The florist who sends the order or message.
Setup Wizard	See Store Setup Wizard.
Shop Code	See Florist Code/ID.
Shortcut Keys	Items on your keyboard that help you navigate faster. To activate the shortcut keys in FTD Mercury, press and hold the <Alt> key, then press the underlined letter of the shortcut item. For example, you can activate the File menu shortcut by pressing and holding the <Alt> key, and then pressing F.
Single Store	A store setup option with one store and one customer base. All bookkeeping is done at a single location.
Slimcast Message	Slimmed down, targeted messages used for marketing floral products, promoting upcoming functions, or communicating with fellow Mercury Network members.
Software	The instructions, in computer languages, that control and direct computer programs and operating systems to perform designated tasks.
Sort Name	The name by which FTD Mercury will sort a customer's name for reports and statements.
Special Instructions	A field to enter any special instructions for the delivery driver such as "Leave on the front porch if recipient is not home."
Standing Order	A recurring order that FTD Mercury generates based on a Standing Order template.

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
Start Button	When you click the Windows Start button on your desktop, the Windows Start menu opens, allowing you to access programs, adjust computer settings, and find files.
Status	How one florist is ranked in relation to others when the Administrator marks a specific florist. All stores are ranked "normal" by default, but other statuses are "First Choice," "Preferred" and "Not preferred." You can change a florist's status in the Florist Search or Florist Detail windows.
Store Setup Wizard	A program that is executed when you turn on your computer for the first time. This program prompts you for basic store information, such as wire service codes and store name and address.
Store Transfer	The ability from Order Entry or Point of Sale to transfer an order in a multi-store environment. You must enable Store Transfer in Mercury Administration.
SUS Message	Allows you to suspend FTD Mercury from receiving orders temporarily. Your system will continue to receive administrative and order-related messages during the suspension period. While suspended, orders sent to your shop are forwarded automatically.
System Tray	The system tray appears on the right side of
Tabs	Items that allow you to access more information without changing windows. For example, the Mercury Message window contains tabs that allow you to choose how you would like to search for a message.
Task Bar	The bar located at the very bottom of your screen. This bar displays every program or file you have open. When you minimize a window, it is sent to the task bar. To open an item on the task bar, simply click it with your left mouse button once.
Tax Exempt Customer Report	Report that lists all tax-exempt customers that have had transactions within the specified date range. This report is only available if you have either the Billing, Order Entry, or Point of Sale module.
Ticket Report	Report that provides you with an analysis of each ticket type, the products ordered on each ticket, and the cost and quantity of product ordered per ticket, for a given date range. This report is available only if you have the Billing, Order Entry, or Point of Sale module.
Title Bar	Located at the very top of every window, this bar displays the name of that window.
Transmission Priority	The priority of an order, which determines the processing time and cost for transmitting the order. Once the Host Computer receives the order, it is sent to a filling Member based on the priority selected by the sending Member.
Transmit	Sending or transferring data over the Mercury Network.
Wire Reconciliation Report	Report that lists disputed, reconciled and/or non-reconciled orders.
Wire Service Incoming/ Outgoing Report	Report that provides you with all incoming and outgoing orders by wire service in a given date range.

Table G-1: Glossary of FTD Mercury Terms (cont.)

Term	Definition
Wire Service Reconciliation	Comparing the messages in your Message Log to those on your Combined Report to determine whether you are paying the correct amount of money or receiving the correct amount of money from each wire service of which you are a member.
Wire Services	Organizations (such as FTD) that provide floral-ordering services electronically.
X-Out	A Point of Sale transaction that prints out cash drawer totals, but does not close the Point of Sale session.
Z-Out	Closes out the current Point of Sale session for the given terminal and prints out totals for all completed transactions so the cash drawer can be balanced. A z-out (also known as “end of day”) is usually performed at the end of the day.

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