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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 24–63

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 of for all stores. If you 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 18–7.

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 18–14.

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 Jennifer Smith Local Delivery Fresh arrangement / Karen's Flower Shop

000241/1 Carry Out Blooming Plants / 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.