FTD Mercury X

Quick Reference Guide

Contents

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Using the FTD Mercury Quick Reference Guide

Although you will rapidly become proficient in using FTD Mercury in your shop, there are some tasks you may not perform often, and others that are important for everyone (including new or seasonal employees) to know how to perform. This *FTD Mercury Quick Reference Guide* walks you through many of the important tasks you may need for day-to-day operations and will be particularly helpful for those new to FTD Mercury.

Topic cards in the *FTD Mercury Quick Reference Guide* are double-sided. The front side contains the procedure to follow; when possible, the reverse shows one or two images of the windows you interact with when performing the task. In procedures, user interface elements (such as window, button, and option names) appear in boldfaced text.

Cards are organized into sections by different flower banners as follows:

Administrative
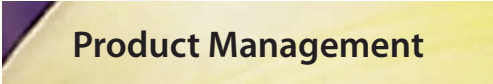
Product Management

Customer Management

Operations

Order Management

Checklists

For more details about these procedures, or for other information not included in this guide, check out the *FTD Mercury Reference Guide* (a link to it is available on your FTD Mercury desktop). You can also access online help for FTD Mercury by selecting Contents from the Help menu within FTD Mercury.

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Contacting FTD

By Phone

FTD Mercury Support:	**1-888-309-2244**
Mercury Technology Sales:	**1-800-767-3222**
FTD Member Services:	**1-800-788-9000**
FTD Directory Services:	**1-800-788-9000**
FTD Mercury Billing:	**1-800-788-9000**

By Email

Mercury Technology Sales:	**TechSales@FTDi.com**
FTD Member Services:	**FTDMemberServices@FTDi.com**
FTD Directory Services:	**DirectoryServices@FTDi.com**

By General Message

FTD Mercury Technical Support:	**90-5034AA**
Mercury Technology Sales:	**90-4664AA**
FTD Member Services:	**90-0555AA**
FTD Directory Services:	**90-0258AA**
FTD Mercury Billing:	**90-0373AA**

By Web

FTD, Inc.:	**www.FTDi.com**
FTD Mercury:	**www.FTDMercury.com**

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Searching for Customers

Customer Search allows you to find customers already in your database. Once you have located the customer, you can view the information or change it (such as address, phone number, or account information). You can search for a customer while entering an order (from the Customer field in Order Entry or Point of Sale) or from the FTD Mercury Main Menu.

To search for customers 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. In the **Search Parameters** area, enter information to locate the customer. If you enter more than one parameter, the customer must match all parameters to be included in the results list.
3. Click **Search**. Customers who match your search criteria appear in the results list below the **Search Parameters** area.
4. Double-click on a customer in the results list to view information in the **Customer Detail Information** window.

When you are entering a sale and enter the customer name, phone number, or account number, FTD Mercury searches the customer database. If multiple customers are found with the same or similar name, the Customer Search window asks you to select the correct customer. If no customer matches the name you entered, you are asked if you want to add the new customer to your database.

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Searching for Customers

Enter your search parameters to locate the customer. If you select multiple parameters, the customer must match all of them to appear in the results list.

Customer Search results are color coded; customers who are highlighted in red have past-due accounts and customers highlighted in yellow are inactive.

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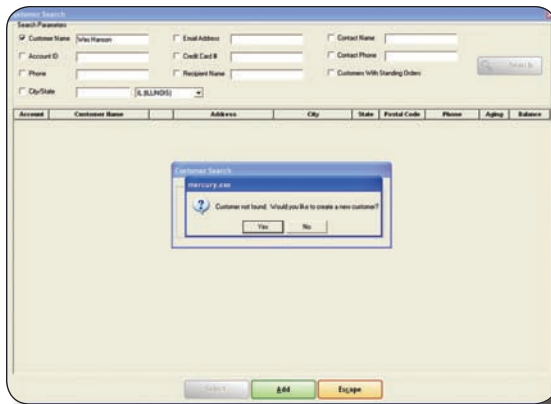
Adding New Customers

FTD Mercury makes maintaining your customer information easy. Once you have added a customer to your database, FTD Mercury stores the customer's transactions, so you can quickly see the order information, contact information, and credit card details for each of your customers. Maintaining this information also helps you with your marketing strategies. It all starts with adding a customer to your database.

To add a new customer to your FTD Mercury database:

1. On the **File** menu, click **New Customer**. In **Order Entry** or **Point of Sale**, when you enter a name in the **Customer** field, if the customer does not already exist in your database, you are prompted to add the new customer from the **Customer Search** window.

2. In the **Customer Detail Information** window, on the **General** tab, enter the customer's name, address, and phone number.

3. If you plan on faxing statements to this customer, select **Fax** from the **Contact Information** list and enter the customer's fax number. If you want to email statements to the customer or send email delivery confirmations, enter the customer's email address in the **E-mail Address** field.

4. If the customer is tax exempt, select the **Tax Exempt** option and enter the exemption code.

5. If you want to assign a default discount for this customer, enter it in the **Discount Percent** field.

6. From the **Referral Code** list, select the way you obtained the customer.

7. Ensure the **Active Status** option is selected.

8. Select whether you want to send delivery confirmation email messages to the customer, whether you want to include the customer in direct mail or email marketing, and whether you want to protect the customer record from system purges if you run the **Purge Customers** utility.

9. If you have multiple stores, from the **Store of Origin** list, select the store with which the customer is to be associated (the customer can still place orders in all stores).

10. Click other tabs, such as **House Account** and **Marketing**, to configure house account information and marketing categories (if desired). Customers can only charge sales to accounts if you have created a house account for the customer.

11. Click **Save**.

Adding New Customers

In Order Entry and Point of Sale, if you enter the name of a customer who is not already in your customer database, FTD Mercury asks if you want to create a new customer.

Regardless of whether you add new customers from Order Entry, Point of Sale, or the FTD Mercury Main Menu, you enter information about the customer in the Customer Detail Information window.

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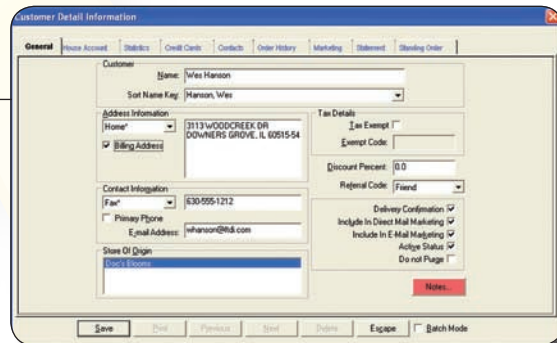
Configuring House Accounts

House accounts allow customers to run a balance at your store, so they may charge products and services from your store and not pay immediately. At the end of the billing cycle, you send statements to each customer for payment on their account. Only customers with configured house accounts can charge sales to their accounts.

To set up a house account:

1. For new customers, on the **File** menu, click **New Customer**. For established customers, click **Customer Search** and perform a **Customer Search** to locate the customer, then double-click on the customer.
2. In the **Customer Detail Information** window, click the **House Account** tab.
3. In the **Account ID** field, click **Auto** to automatically generate an account number, or enter the account ID for the customer.
4. From the **Accounting Type** list, select whether you want to use **Balance Forward** or **Open Item** accounting.

    TIP: You can configure the default settings for house accounts in **Mercury Administration**.

5. In the **Credit Limit** field, enter the maximum dollar amount of credit you want to extend to the customer.
6. From the **Billing Cycle** list, select the billing frequency.
7. From the **Default Payment** list, select the default method of payment. Typically, you should set this to **Credit**.
8. Configure finance charges:
    » In the **Annual Finance Charge** field, enter the finance charge percentage to charge if the account is past due.
    » In the **Minimum Finance Charge** field, enter the minimum finance charge to assess if the account is past due.
    » From the **Finance Grace Period** list, select the number of days you want to wait before assessing finance charges.
9. Select whether you want to print statements, fax statements, and/or email statements to the customer.
10. If desired, select **Print Dunning Messages** if you want to print a dunning message at the bottom of each statement.
11. In the **Terms on Account** field, enter any additional text you want to appear on this customer's statements.
12. Click **Save**.

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Configuring House Accounts

Use the House Account tab in the Customer Detail Information window to configure house account details.

You can either enter your own account ID, or you can click Auto and let FTD Mercury generate one for you.

Make sure you set the account type, credit limit, billing cycle, annual finance charge, minimum finance charge, and grace period for the account. Also ensure you select whether you want to print, fax, and/or email statements to the customer.

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Receiving House Account Payments

When you have house accounts set up for customers, you must update the balance when a customer provides payment for the goods and services they purchased from you.

To receive payment on a house account:

1. For walk-in customers, or if you want the payment to be included in the drawer count, you can click **Receive Payment** from the **Point of Sale** window. If you are receiving payments by mail, you can process payments by clicking **Receive Payment** on the **FTD Mercury Main Menu**.

2. In the **Customer** field, enter the customer's name or account number and press **Tab** to look up the customer, or click the **Search** button (**…**) to open the **Customer Search** window.

3. In the **Payments** area:

    » In the **Type** column, select the payment type.

        » If this is a credit card payment, in the **Account Number** column, enter the card number (or swipe the card). In the **Exp Date** column, enter the expiration date for the card. In the **Name** column, enter the cardholder's name.

        » If this is a debit card payment, if you are a Canadian shop processing debit cards through FTD Mercury, select **Debit** and have the customer swipe their card and enter their PIN (you must process Canadian debit cards in **Point of Sale**). For U.S. shops, select **Debit**, enter the account number and process the payment using a third-party device outside of FTD Mercury.

    » In the **Amount** column, enter the dollar amount to be applied to the account.

4. For customers with open item accounts, in the **Allocation** area, enter the dollar amount to be allocated to each ticket in the **This Payment** column. The **Unallocated Balance** field displays the amount that has not been allocated to an invoice.

5. In the **Date** field, enter the payment date.

6. From the **Store Name** list, select the name of the store that has invoices where the payment is to be applied.

7. If this is a cash payment, enter the amount being tendered in the **Tendered Amount** field. If change is due, FTD Mercury will display the amount for you to give to the customer.

8. Click **Complete**. If you used **Point of Sale** to receive payment, a receipt will print.

Receiving House Account Payments

Receiving House Account Payments

When you receive payment on a house account, you enter in the amount of money the customer is paying you in the Receive Customer Payment On Account window. This payment is credited to the customer's house account.

If a customer is making a cash payment at your Point of Sale terminal, enter the amount the customer is paying in the Tendered Amount field. If this amount is more than the amount due, FTD Mercury will calculate the change due.

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Manually Changing House Account Balances

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 they purchased on the house account. Debit memos allow you to apply a debit against a customer's house account. You may need to do so to add a miscellaneous charge to the account that was not associated with a purchase.

To create a credit memo or a debit memo:

1. On the **Management** menu, click **Credit/Debit Memo**. The **Credit/Debit Memo** window opens.

2. Select either **Debit Memo** or **Credit Memo**, depending on whether you are debiting or crediting the account.

3. In the **Customer** field, enter the customer's name and press **TAB**, or click the **Search** button (**…**) to perform a **Customer Search**.

4. If you have multiple stores, from the **Store Name** list select your store.

5. In the **Ticket Date** field, enter the date the charge or credit is to be applied.

6. In the **Reference** field, enter any text that will help you identify this memo, such as a date or Order Entry number.

7. In the product grid, in the **Product Code** column, enter the product code for the product being credited, or click the **Search** button (**…**) to perform a **Product Search**.

8. In the **Qty** column, enter the number of each product being credited or debited. The **Description** fills in automatically. If a default price has been assigned to the product code, the **Amount** and **Extension** (final cost for the product) will also populate automatically; if no default price has been assigned, enter the price for the product and the **Extension** will update automatically. If the customer received a discount on the product(s), you must enter the discount in the **Discount** column. The **Total** field will display the total credit or debit dollar amount. FTD Mercury will enter the correct tax automatically.

9. Click **Save**.

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Manually Changing House Account Balances

You can create a credit or debit memo for a customer's house account using the Credit/Debit Memo window. Make sure that you select the appropriate memo type (Debit Memo or Credit Memo) from the options at the top of the window.

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Generating Customer Statements

For customers with house accounts, statements provide a detailed list of charges and payments made during the billing cycle. They also display the total amount due (including previously billed invoices that have not been paid).

To generate customer statements:

1. On the **FTD Mercury Main Menu** menu, click the **Statements** button. The **Generate Statements** window opens.
2. Select the statement and sorting information. You must select the store, billing cycles, statement date, and whether you want to generate finance charges. Click **OK**.
3. When the **Finance Charge** window opens, select any customers you do not want to apply finance charges to and click **Remove**. Click **OK** to accept the finance charges for the remaining customers in the list.
4. In the **Output Statements** window, specify your print, fax, and email options.
5. Select other options as necessary, including the number of statements on the page (one for letter-sized paper, two for legal-sized paper), whether you want to print accounts with credit balances, and whether you want to print statements only if there has been activity since the last statement. You can also define the minimum amount owed on a customer account that will result in a generated statement (allowing you to exclude customers with small balances from receiving statements).
6. Click **Execute**.
7. You will be reminded to load statement forms into the printer. Click **OK**.
8. FTD Mercury will display the number of statements being printed, and the combined number of statements being faxed or emailed, along with the total dollar amount billed. Click **OK**. Statements will begin to print, and faxes and email messages will be sent according to settings for that house account.

Generating Customer Statements

Use the Generate Statements window to select the billing cycles for the statements you are about to generate, the statement date, how you want to sort the statements, and whether you want to include finance charges.

The Output Statements window allows you to select how many statements per page, additional criteria for generating statements, and when to fax or email the statement to the customer (if configured for the customer).

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Entering Orders for Local Delivery

The most basic order you enter in FTD Mercury is an order for local delivery. Typically, this is either placed by a customer in person or over the phone. If the customer is placing the order in person, you should use Point of Sale; orders placed by a customer over the phone should be entered in Order Entry.

To enter an order for local delivery:

1. On the **FTD Mercury Main Menu**, either click **Order Entry** or **Point of Sale**. The **Order Entry** or **Point of Sale** window opens.
2. From the **Employee** list, select your employee name.
3. In the **Customer** field, enter the customer's name and press **TAB**. If more than one customer matches the name, you need to select the correct customer. If the customer does not exist in your database, you need to add the customer.
4. In the **Ordered By** field, enter the name of the person placing the order.
5. In the **Recipient** area, enter the recipient's name, address, and phone number.
6. In the **Delivery** area, enter the delivery information for the order. If you have configured FTD Mercury to apply delivery zone fees, the delivery fee will be added to the product grid.
7. In the **Card** area, enter the card message.
8. From the **Occasion** list, select the occasion for the order.
9. In the **Products** area, enter product information.
10. Click **Payment**. The **Payments** window opens.
11. Enter payment information for this order.
12. Click **Complete**.

Depending on configurations for your system, billing invoices, worksheets, cards, and/or receipts will print.

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Entering Orders for Local Delivery

When entering an order for local delivery, make sure you enter all information. This includes customer, product, recipient, card, and delivery information.

In the Payments window, enter the payment method for the order. You may also have marketing questions to ask the customer.

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Creating 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.

To enter an order as C.O.D.:

1.   In **Order Entry** or **Point of Sale**, create the order as you normally would. If the order is for pickup, select a pickup zone. For C.O.D. orders that will be delivered, select a local delivery zone.

2.   When you finish entering the order, instead of clicking **Complete** or **Payment** as you normally would, click **COD**.

When the invoice prints, the order will be clearly marked as requiring payment before delivery or pickup.

To complete a C.O.D. order:

1.   On the **FTD Mercury Main Menu**, click either **Order Entry** or **Point of Sale**.

2.   In the **Order Entry** or **Point of Sale** window, click **Lookup**. The Ticket Search window opens.

3.   Select the **Type** option and select **C.O.D.** from the available order types.

4.   If necessary, select the store where the C.O.D. order was placed from the **Store** list.

5.   Click **Search**.

6.   In the results list, double-click the ticket you need to complete. The order opens in either **Order Entry** or **Point of Sale**.

7.   Click **Complete**. The **Payments** window opens.

8.   In the **Payments** area, select the payment type and the amount tendered.

9.   Click **Complete**.

10.   Click **Escape** to close the **Order Entry** or **Point of Sale** window.

Creating C.O.D. Orders
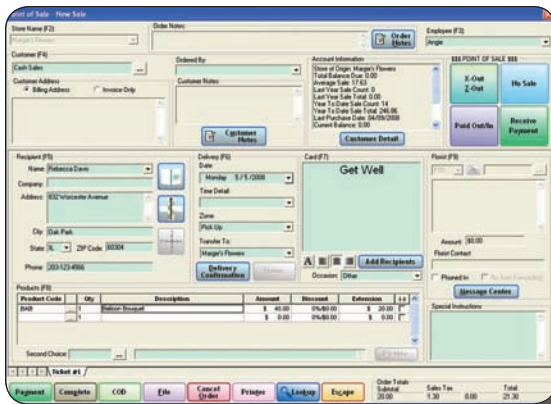
When creating a C.O.D. order, you fill out information in Point of Sale or Order Entry the same as you would for any other order. However, you click COD instead of Payment or Complete.

When the customer picks up the order or after your driver has collected cash when the order was delivered, you need to perform a Ticket Search to find the order and complete it.

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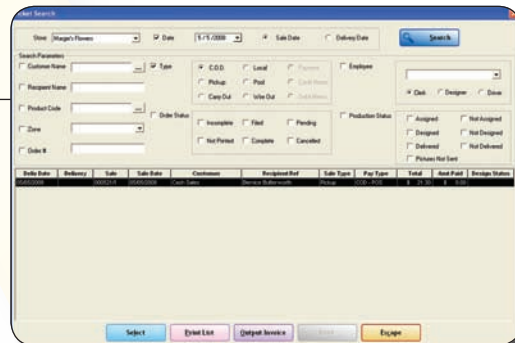
Handling Returns & Exchanges

When a customer returns something purchased from your shop, you need to enter information in FTD Mercury for record keeping and to determine the correct amount of money to return to the customer. This may require you to create a credit memo for an order that was charged to a house account, or you may have to credit funds back to a credit card or provide a cash refund, depending upon the original purchase method.

To process a return or exchange:

1. On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. You can also click **Lookup** from the **Order Entry** or **Point of Sale** window. The **Ticket Search** window opens.

2. In the **Search Parameters**, enter search criteria and click **Search**.

3. If you are refunding or exchanging an item from a specific ticket in a multi-ticket sale, right-click on the ticket and click **Refund Ticket**. Otherwise, right-click on the sale and click **Refund Sale**. (Tickets which already have refunds associated with them are highlighted in light blue.)

4. When the **Order Entry** or **Point of Sale** window opens, FTD Mercury displays a refund sale containing a copy of the original order with negative values for the items. Remove the items not being refunded or exchanged, and add any new products for exchanges.

5. Click **Complete**. Depending on whether you owe the customer money or the customer owes you money (in the case of an exchange), the **Refund** or **Payments** window opens.

    » For a refund, in the **Payments** area, select the refund type. The **Cash Due** field indicates the amount of cash to return to the customer. If this is a credit card refund, either manually enter the credit card number or swipe the credit card.

    » For an exchange where the customer owes you additional funds, in the **Payments** area, select the payment type. The **Balance Due** field indicates the amount the customer owes you.

6. Click **Complete**.

    NOTE: For refunds to a house account when the customer uses open item accounting, select **Receive Payment** from the **Management** menu and apply the credit to the appropriate ticket.

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Handling Returns & Exchanges

Refund sales automatically have the items from the original sale marked as negative amounts. When you create a refund from Ticket Search, the recipient is listed as a refund of the original sale.

The Refund window displays the amount refunded to the customer, whether it is back to a house account, to a credit card, or in cash to the customer.

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Adding & Using Funerals in Orders

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.

To add funeral information to the 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.
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 manually enter it or click the **Facility Search** button to search for the funeral home.
6. If there are any notes, add them to the **Notes** field.
7. Click **Save**. The recipient appears in the **Funeral Log** window.

Once you have entered funeral information, you can use the funerals to populate recipient information when entering orders in Order Entry or Point of Sale.

To use funeral information from the Funeral Log in an order:

1. In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. The **Funeral Log** window opens, displaying funerals for the current and future dates.
2. If the recipient is not displayed, enter search parameters to locate the recipient and click **Search**.
3. From the list of funerals, double-click the funeral. The **Funeral Log** window closes and information about the funeral is automatically inserted into the **Recipient** area of the **Order Entry** or **Point of Sale** window.

Adding & Using Funerals in Orders

Selecting the recipient from the Funeral Log populates the Recipient information in Order Entry or Point of Sale.

Use the Add Recipient window to enter details about a funeral.

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Canceling Orders

If the customer has charged an order to their house account, you can cancel the order as long as you have not run statements for this transaction, have not exported it to QuickBooks, or (if the order was placed in Point of Sale) you have not performed a Z-out transaction for the Point of Sale session. Otherwise, you must either issue a credit memo to credit the house charge back to the account, or process a return. You cannot cancel a credit card order if the order has been settled.

If the customer placed the order on a credit card, the amount is credited back to the customer's account. If the order was a cash sale, you will refund cash back to the customer.
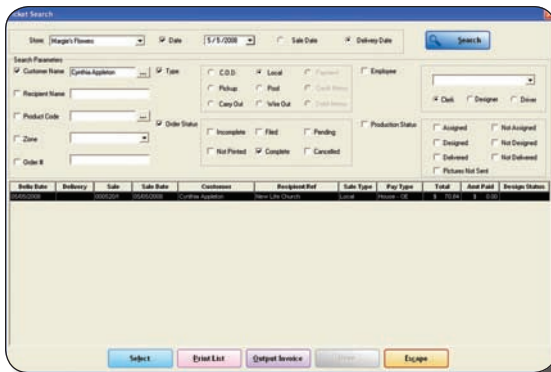
To cancel an order:

1. On the **FTD Mercury Main Menu**, either click **Order Entry** or **Point of Sale**, depending on where the original order was entered. This is critical for house charges entered in **Point of Sale;** you can only cancel these within **Point of Sale** before you have performed a Z-out transaction for the session.
2. Click **Lookup** to perform a **Ticket Search**. The **Ticket Search** window opens.
3. Enter the criteria you are searching by in the appropriate field(s) and click **Search**.
4. From the results list, double-click on the ticket to open it in **Order Entry** or **Point of Sale**.
5. Click **Cancel Order**. If **Cancel Order** is disabled, you need to process the order as a return or refund.
6. FTD Mercury asks you "*Are you sure you want to cancel this order?*" Click **Yes**.
7. When the **Order Entry** or **Point of Sale** window appears again, the order has been canceled.

If you cannot cancel an order, you can create a refund for the customer. Consult the *FTD Mercury Reference Guide* or online help for specifics on when you can cancel or change an order.

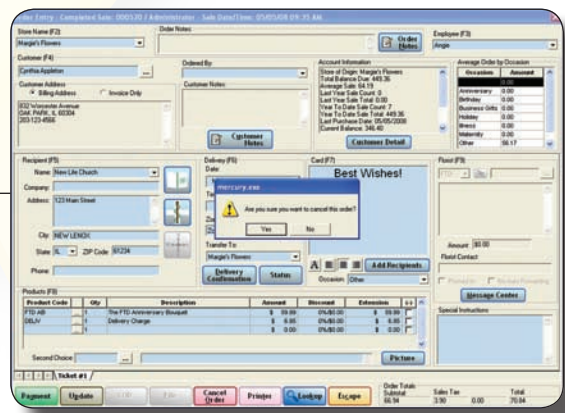Simply **Easier**. Simply **Better**. Simply **Mercury**.™

Canceling Orders

Use Ticket Search to locate the order you want to cancel.

Once you have found the order and opened it in Order Entry or Point of Sale, click Cancel Order. You will be asked to confirm the cancellation.

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Changing Prices for Credit Card Orders

Before a credit card transaction has been settled, you still have an opportunity to change the price for the order. You may, for example, need to change a delivery or product price, or you may need to add to an order. You cannot make changes after the transaction has settled.

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 transaction was originally entered.
2. Click **Lookup**. The **Ticket Search** window opens.
3. In the **Search Parameters**, enter the customer's name in the text box and click **Search**.
4. From the results list, double-click on the ticket you want to change. The ticket opens in **Order Entry** or **Point of Sale** (where you launched **Ticket Search**).
5. Make changes to the product or delivery amounts as necessary.
6. Click **Payment**. The **Payments** window opens.
7. In the **Payments** grid, change the value of the **Amount** column for the credit card to equal the amount displayed in the **Total** field.
8. 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**.
9. Click **Complete**. The sale is approved with the new total.

For information on when you can modify orders, see the section Editing an Order from History in the Working with Orders chapter of the *FTD Mercury Reference Guide* (click on the shortcut on your FTD Mercury desktop to open the Adobe Acrobat PDF).

Changing Prices for Credit Card Orders

In the Payments window, you need to change the value of the Amount column in the Credit row to match the value in the Total field. This allows you to change the price for a credit card order.

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Reprinting Invoices

Many situations may require you to reprint an invoice, including losing the invoice, damaging the invoice, or printer problems where the invoice did not print correctly. You can reprint any invoice from Ticket Search.

To reprint an invoice:

1. On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. The **Ticket Search** window opens.
2. In the **Search Parameters** area, enter information necessary to locate the ticket and click **Search**.
3. From the results list, select the order you want to print, and click **Output Invoice**. The **Output Options** window opens.
4. In the **Print Output** area:
    a. Ensure the **Print Invoice** box is selected.
    b. From the **Store Name** list, select the store where you are reprinting the invoice. You must select the store so FTD Mercury can determine the printers you can use to reprint the invoice.
    c. From the **Ticket** list, select the ticket you want to reprint, or select **ALL** to reprint all tickets associated with the order.
    d. From the **Form** list, select the form you want to reprint.
    e. From the **Printer Name** list, select the printer where you want to reprint the invoice.
    f. From the **Tray** list, select the tray on the printer which contains the correct paper to use.
5. In the **Fax Output** area, ensure the **Fax** box is cleared.
6. In the **Email Output** area, ensure the **Email** box is cleared.
7. Click **Execute**.

Reprinting Invoices

To locate the order you want to reprint the invoice for, you need to perform a Ticket Search. Select the order in the results list and click Output Invoice.

On the Output Options window, ensure you select the ticket(s) you want to print, the form you want to use, and the printer and tray where you want to reprint the invoice.

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Searching for Mercury Messages

Message Center allows you to locate a message sent from or received by your store via the Mercury Network. You can perform a search by delivery date, message date, message type, recipient name, Mercury order number, local order number, message type, or florist member code. After you search, messages that match your search criteria appear in a results list. You can then highlight individual messages to view details about them, including the text of the message, the florist you were corresponding with, and any messages related to the original order.

To search for messages in FTD Mercury:

1. On the **FTD Mercury Main Menu**, in the **Search** area, click **Message**. The **Message Center** window opens. You can also click the **Message Center** button in **Order Entry** or **Point of Sale**.
2. In the **Search Parameters** area, enter your search criteria. Click **Search**.
3. From the results list, highlight the message for which you want to view details. Related messages appear in the related messages area; the text of the message and information about the florist appear at the bottom of the window.

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Searching for Mercury Messages

Open the Message Center from the FTD Mercury Main Menu (click Message in the Search area) or by clicking Message Center in Order Entry or Point of Sale.

The Message Center window allows you to search by delivery date, message type, message date, recipient name, order number, or florist shop code. After you perform the search, messages that match your search parameters appear in the results list. Highlight a message to display full details for it.

Unattached orders appear in green text. Messages currently being viewed on another FTD Mercury system in your shop (or at a remote location) are highlighted in yellow. Messages with errors appear in red text.

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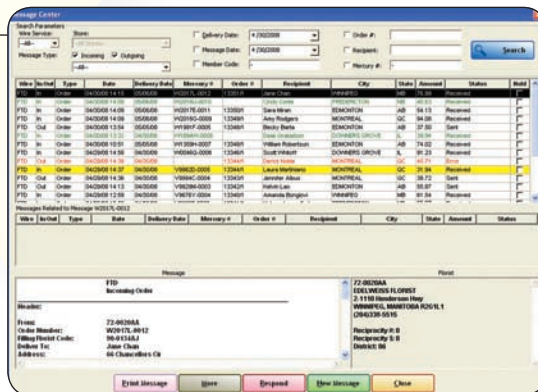
Sending Mercury Orders

Using Order Entry or Point of Sale to create a Mercury wire out order allows you to access your customer database so you can add or change information when entering the order. You can also charge the order to the customer's house account.

To create an outgoing Mercury wire order:

1. On the **FTD Mercury Main Menu**, click **Order Entry** or **Point of Sale**. The **Order Entry** or **Point of Sale** window opens.
2. From the **Employee** list, select your employee name. If you are in a multi-store environment, from the **Store** list, select your store.
3. In the **Customer** field, enter the customer's name and press Tab to locate the customer's information.
4. In the **Ordered By** field, enter the name of the person placing the order.
5. In the **Recipient** area, enter the recipient's name, address, and phone number.
6. In the **Delivery** area, enter delivery information for the order. You must select a wire out zone from the **Zone** list.
7. In the **Card** area, enter the card message.
8. From the **Occasion** list, select the occasion for the order.
9. In the **Products** area, enter product information. You should also fill in a second choice in case the first choice is not available.
10. In the **Florist** area, select a wire service and enter the filling florist's wire code (you can click the **Auto Select** button to have FTD Mercury select the florist for you). If you have called the florist to place the order by phone, selected the **Phoned Out** box; if you are transmitting the order over the Mercury Network, ensure the **Phoned Out** box is cleared.
11. Select whether you want to disable auto forwarding for this order.
12. Click **Payment** to open the **Payments** window.
13. In the **Payments** area, from the **Type** list, select the payment method. For credit card orders, in the **Account** column, enter the account number or swipe the card.
14. Click **Complete**.

When FTD Mercury sends the outgoing message, the message will contain the information in the Order Entry or Point of Sale window.

Sending Mercury Orders

You enter information about the outgoing Mercury order in the Order Entry or Point of Sale window. This includes customer information, product information, recipient information, delivery information, and the card message.

When you select a wire out zone, the Florist area becomes active. In this area, you need to either select a filling florist or let FTD Mercury automatically select one based on the recipient's location.

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Processing Incoming Mercury Wire Orders

As a member of the Mercury Network, you can receive incoming Mercury wire orders. Incoming wire orders are charged to the appropriate wire service house account, allowing you to track incoming orders from each wire service. When you attach an incoming order, FTD Mercury automatically applies all fees associated with the delivery zone, reducing the product amount by the total fee amount. This eliminates the need to change the product amount manually to match the order amount.

To process an incoming Mercury wire order:

1. On the **FTD Mercury Main Menu**, click **Order Entry**.
2. From the **Employee** list, select your employee name.
3. In the **Florist** area, click **Message Center**. Messages requiring attention (including incoming orders) are displayed in the results list when Message Center opens.; unattached messages are displayed in green text.

    TIP: If you use Automatic Order Processing (AOP), depending on your configuration, many of your incoming orders may already be attached and processed.

4. Double-click the order from the results list. It automatically opens in **Order Entry**, with most information already entered.
5. In the **Products** area, enter the appropriate product codes (if necessary).
6. If the order is for delivery, from the **Zone** list, select the appropriate delivery zone (if the correct one is not already selected). If the zone was not already selected, adjust the product amount so the sale total is correct.
7. Click **Payment**. The **Payments** window opens.
8. In the Payments area, change the payment type in the **Type** column (if necessary). For wire orders, this should already be set to **House**; for Florists Online (FOL) or Flowers All Hours (FAH) orders, you should typically set this to **Credit**.
9. Click **Complete**.

Depending on your system settings, invoices, worksheets, and/or cards will print.

Processing Incoming Mercury Wire Orders
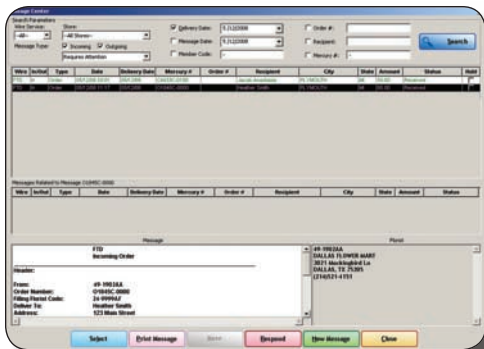
In the Order Entry window, click Message Center to open the Message Center window. You can then search for the wire order you want to attach (most likely with today's date). Unattached orders appear in green text. Double-click the order to attach the order.

After you attach the incoming order, information about the order is transferred to your Order Entry window. You can then complete the order as you would for a local order. Make sure you select a local delivery zone.

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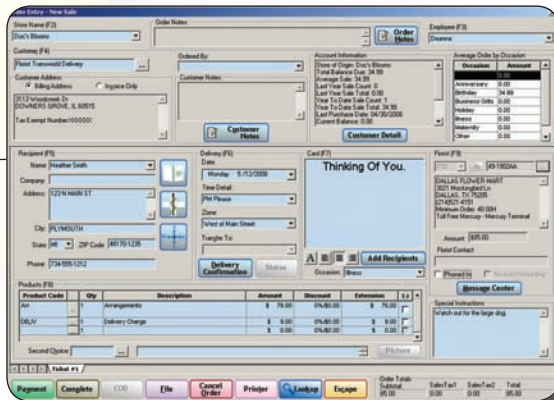
Processing Phoned-In Mercury Orders

Phoned-in orders come from florists associated with a wire service. By keeping track of phoned-in FTD orders using FTD Mercury, the Rec Message List is automatically built for you, and you can send it to FTD at the end of each month. Using Order Entry to enter incoming phone orders allows you to print a Report of Orders Filled to send to the wire services you are a member of to receive credit for your orders.

To process a Mercury order received over the phone:

1. On the **FTD Mercury Main Menu**, click **Order Entry**.
2. From the **Employee** list, select your employee name.
3. In the **Florist** area, click **Phoned In**. Select the wire service the sending florist is using, enter the sending florist's shop code, enter the name of the person you spoke with at the sending florist shop, and enter the amount the provided to you by the sending florist in the **Amount** field.

    TIP: When you select Phoned In, the wire service's house account is automatically filled in as the customer.

4. In the **Recipient** area, enter recipient information.
5. In the **Delivery** area, enter delivery information.
6. In the **Card** area, enter the card message.
7. From the **Occasion** list, select the occasion for the order.
8. 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 the products you add should be the same as the value of the **Wire** product.
9. When the total of the products is the same as the **Wire** product, right-click on the **Wire** product and click **Remove**.
10. Click **Payment**. The **Payments** window opens.
11. Click **Complete**.

Depending on the settings for your system, invoices, worksheets, and/or cards will print.

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Processing Phoned-In Mercury Orders

Fill out product, recipient, and delivery information using the wire service house account as the customer.

When you click Phoned In, the Florist area becomes active. You can then select the florist ID, wire service, and adjust the amount to reflect the total price of product and delivery. When you click Payment, the wire service house account will be selected.

Searching for Florists

When you create a wire out order to be transmitted over the Mercury Network, you need to select a florist to fill the order. You can perform a Florist Search while you are entering an order (in Order Entry or Point of Sale) or from the FTD Mercury Main Menu.

To search for a florist:

1. On the **FTD Mercury Main Menu**, in the **Search** area, click **Florist**. Alternatively, if you are in **Order Entry** or **Point of Sale**, you can click the **Search** button (**…**) in the **Florist** area (you must either have a wire out zone selected or have clicked the **Phoned In** option to enable the Florist area). The **Florist Search** window opens.
2. Enter your search criteria. You must at least search by **City/State**, **Zip**, **Member Code**, **Phone**, **Florist Name**, or **Owner's Name**. If you enter multiple search parameters, only florists who match all parameters will be displayed.
3. Click **Search**. Florists who match your search parameter(s) are displayed in the results list.
4. Highlight a florist to view detailed information, such as florist location, special listing information, and pricing. You can also click on a banner ad at the bottom of the screen or on a paid placement ad at the right side of the screen to jump to that florist and view detailed information.

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Searching for Florists

In the Search Parameters area, enter the criteria you are using to locate the florist.

Florists matching your search criteria appear in the results list. Florists who have purchased red ink in the printed Florist Directory have red text; florists who appear in the Sunday Supplement are highlighted in light green. If you want to see a legend for Florist Search, press F1 to display online help.

If you click on a banner ad or a paid placement ad, FTD Mercury highlights the corresponding florist in the results list.

Information about the selected florist is displayed below the results list, including the florist's location, pricing information and special listings.

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Resending Rejected Orders

When you send a Mercury wire order, the florist you selected may reject the order. This may be for a variety of reasons, such as if the recipient is outside of the filling florist's delivery area, if the florist is out of product, or even if the florist is too busy to fill the order.

To resend a rejected order:

1. On the **FTD Mercury Main Menu**, in the **Search** area, click **Message**. The **Message Center** window opens.
2. In the **Search Parameters** area, next to **Message Type**, select **Incoming** and ensure **Outgoing** is cleared. From the **Message Type** list, select **Reject**.
3. Click **Search**.
4. From the results list, double-click the rejected order you want to resend. The order opens in **Order Entry**.
5. In the **Florist Area**, change the florist code to a new florist. You can also click the **Auto Select** button to select a new florist, or click the **Search** button (**…**) to perform a **Florist Search** to find a new filling florist.
6. Click **Update**. The order is automatically sent to the new filling florist.

Resending Rejected Orders
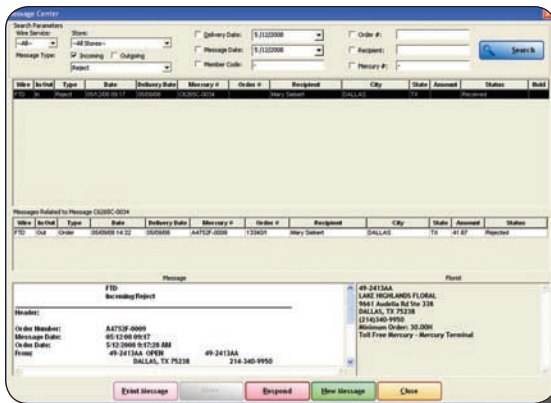
Use the Message Center to locate the message you want to resend. Double-click the message to open it in Order Entry or Point of Sale.

In the Florist area, enter a new florist and click Update. The order will be sent to the new florist.

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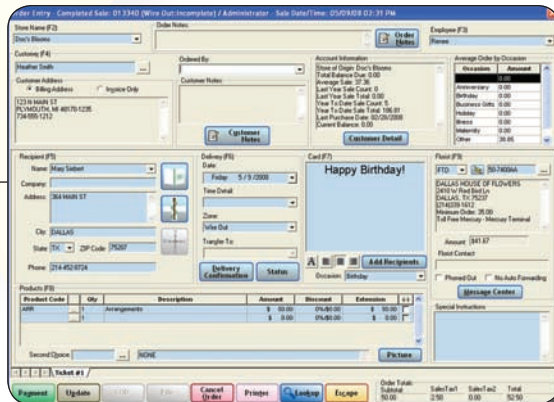
Reporting Phoned-In Orders to FTD

When you receive phoned-in orders from FTD florists, you need to report the orders to FTD to receive payment. FTD reconciles order information for sending and filling florists to ensure all parties receive payment or bills for orders filled.

To report a phoned-in order to FTD:

1. On the **FTD Mercury Main Menu** window, on the **Mercury Message** menu, click **Rec Message List (REC)**.
2. When the **REC Message List** window opens, it already contains all orders in FTD Mercury that you marked as phoned-in orders (by using the **Phoned In** check box in the **Florist** area of the **Order Entry** or **Point of Sale** window and entering information about the phoning florist).
3. Inspect the list to ensure it is accurate. Add additional orders (one per line) if necessary.
4. Click **Send**. The list is sent to FTD over the Mercury Network, where it will be reconciled with the sending florist's information.

After a phoned-in order has been sent to FTD via the REC Message List, it will no longer appear automatically when you create a subsequent REC Message List.

Reporting Phoned-In Orders to FTD

REC Message List

Florist

Store Name: Doc's Blooms

Sending Floris		Delivery Date	Recipient	Occasion	Order Amount
24-5662AA	...	03/29/2007	Jane Smith	Birthday	$ 120.00
12-4016AA	...	04/11/2007	Heather Smith	Illness	$ 56.00
36-0792AA	...	04/11/2007	Heather Smith	Illness	$ 84.99
	...	04/11/2007		Other	$ 0.00

Send (F9)   Save   Remove   Escape

The REC Message List window contains a listing of all phoned-in orders that you have recorded in FTD Mercury. After visually inspecting the list, click Send to send it to FTD.

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Searching for Tickets

Each time you enter a new order, you create one or more tickets. These tickets are a record of the order in FTD Mercury. When you need to find the order again, either to find out information, to provide additional information, or to handle a refund or an exchange, you need to perform a Ticket Search.

To search for a ticket:

1. On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. Alternatively, if you are in **Order Entry** or **Point of Sale**, click **Lookup**. The **Ticket Search** window opens.
2. In the **Search Parameters** area, enter the search criteria you want to use. You can search by **Customer**, **Recipient**, **Product Code**, **Delivery Zone**, **Order #**, **Sale Date**, **Delivery Date**, **Order Type**, **Order Status**, **Employee**, or **Production Status**. Typically, you will search by customer, sale date, employee, or order status.

    NOTE: If you enter more than one search parameter, the ticket must match all parameters to appear in the results list.

3. Click **Search**. Tickets that match your search parameters display in the results list.
4. Double-click the ticket to open it. If you opened **Ticket Search** from **Point of Sale** using the **Lookup** button, the ticket opens in **Point of Sale**. If you opened **Ticket Search** from **Order Entry** or from the **FTD Mercury Main Menu**, the ticket opens in **Order Entry** (even if the order was originally entered in **Point of Sale**).

Searching for Tickets

In the Search Parameters area, enter the criteria for how you want to search for the ticket. You can search by customer, recipient, product code, delivery zone, order #, sale date, employee, order type, order status, or production status.

Results in Ticket Search are color coded. Tickets that are highlighted in red are associated with a credit card error or declined credit card. Tickets highlighted in yellow are canceled. Tickets highlighted in blue have refunds associated with them.

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Adding & Copying Tickets

In both Order Entry and Point of Sale, you can copy tickets. This allows you to create a ticket for a customer and then create additional tickets based on the information you already entered — all within the same order. You can also add tickets to an order in Order Entry and Point of Sale.

To duplicate tickets in Order Entry or Point of Sale:

1. On the **FTD Mercury Main Menu**, click **Order Entry** or **Point of Sale**. The **Order Entry** or **Point of Sale** window opens.
2. Fill out order information that will be common to tickets. Typically, this is customer information and possibly the items being ordered.
3. At the bottom of the window, right-click on **Ticket #1** and click **Copy Ticket**. **Ticket #2** is created (and is identical to **Ticket #1**).
4. With **Ticket #2** selected, make any changes necessary for the second ticket.
5. Complete the order as you normally would.

You can also add tickets to an order (where you have common customer information).

To add a ticket in Order Entry or Point of Sale:

1. At the bottom of the window, right-click on **Ticket #1** and click **New Ticket. Ticket #2** (a blank ticket) is created.
2. Enter in ticket information for the new ticket.

Additionally, you can also copy entire sales or individual tickets in multi-ticket sales from Ticket Search. When you copy a sale or ticket from Ticket Search, you are creating a new order with identical information from the previous order or ticket in the order. You can then modify the order as necessary.

To copy a ticket or sale in Ticket Search:

1. Perform a **Ticket Search** and locate the sale or ticket you want to duplicate.
2. In the results list, right-click on the ticket or sale and either click **Copy Sale** (if you want to duplicate the entire sale) or **Copy Ticket** (if you want to duplicate this ticket only).
3. When the order opens in the **Order Entry** or **Point of Sale** window, make modifications as necessary and complete the sale as you normally would.

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Adding & Copying Tickets

After you enter information in the first ticket, right-click on Ticket #1 and click Copy Ticket. FTD Mercury creates an identical ticket and labels it Ticket #2.

You can copy entire sales or individual tickets from a multi-ticket sale from Ticket Search.

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Taking, Attaching, and Sending Recipient Pictures

Recipient pictures are product pictures you attach to a completed order to send to the sending florist (in the case of wire orders) or to a customer (in the case of local orders). Although it is not mandatory to send Recipient Pictures, it can increase customer satisfaction to see the arrangement you created — whether that customer is your customer or the sending florist.

To take, attach, and send product 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. In the **Products** area, click **Picture**. The **Picture Center** window opens.
4. In the **Attach Pictures** area, select **Recipient**.
5. Take and attach the picture:
    » If you are taking and attaching the picture using a connected Logitech QuickCam Orbit AF camera:
        a. Click **Camera View**.
        b. Place the product so that it is in view of the Logitech QuickCam. If you want to change the camera settings, in the **Logitech QuickCam Toolbar**, click **Change Settings**.
        c. In the **Picture Center** window, click **Take Picture**. If you are satisfied with the picture, click **Attach** to save it. If you want to retake the picture, click **Camera View** and retake the picture, then attach it.
    » If you are attaching a picture that is already on your computer:
        a. Click **Browse**. The **Open Photo** window opens.
        b. Browse to the picture you want to attach, select it, and click **Open**.
        c. Click **Attach**.
4. Click **Send**. Depending on the type of order, the system does one of the following:
    » For wire orders, FTD Mercury sends an **ASK** message containing the URL for the picture.
    » For local orders, the **Output Options** window opens. Verify or modify sending options, then click **Execute** to send the customer an email with a link to the picture.
7. Click **Escape** to close the **Picture Center** window.

Taking, Attaching, and Sending Recipient Pictures
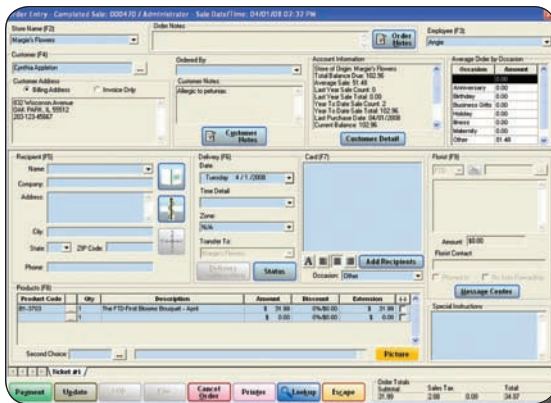
Open the Picture Center by clicking Picture in the Products area of a completed order.

The Picture Center window allows you to take, save, and send product pictures.

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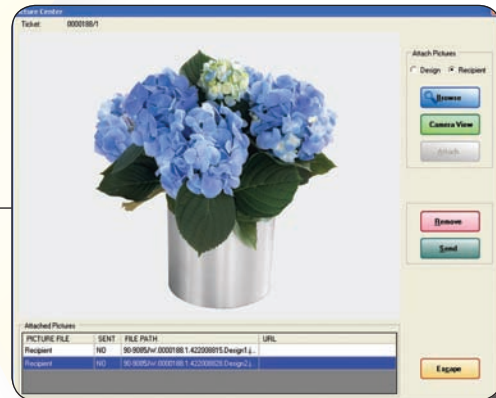
Checking for Pending or Incomplete Orders

Pending orders usually involve some issue with credit card approval. Incomplete orders are ones that you have not yet finished for some reason (not enough information, clarification needed, etc.). In either case, you want to ensure orders are completed and processed.

To search for pending or incomplete orders:

1. On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. The **Ticket Search** window opens.
2. In the **Search Parameters** area, click **Order Status** and both **Incomplete** and **Pending**.
3. If you have multiple stores, from the **Store** list select the store you want to restrict the search to, or select **All Stores** to search for pending orders for all of your stores.
4. Click **Search**. The results list contains all pending and incomplete orders for the store(s) you selected. You can double-click an order to open it.

You can also use the same procedure to search for filed orders, which may also need to be completed. When performing a Ticket Search, select Filed in the Search Parameters area.

Checking for Pending or Incomplete Orders

When performing a Ticket Search, select Incomplete and Pending to display all orders that fall into either of those categories. After the Ticket Search returns results, double-click on the order and take whatever action necessary to complete it.

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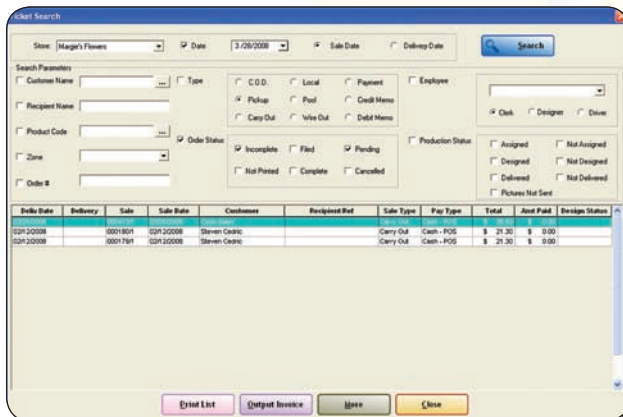
Adding New Products

FTD Mercury is pre-loaded with your FTD wire service–branded and Selection Guide products. However, you may decide to add your own products to the system.

To add a new product to your FTD Mercury database:

1. On the **File** menu, click **New Product**.
2. In the **Local Product Code** field, enter the product code for the new product. You can use any format for the code.
3. In the **Product Name** field, enter a short name for the product.
4. In the **Price** field, enter the price for the product (if desired, enter premium and deluxe prices as well).
5. If you want FTD Mercury to monitor how many units of this item you have on hand, select the **Monitor** option and enter the number of this item you have. FTD Mercury will inform you in **Order Entry** and **Point of Sale** if you are out of the item.
6. Select the **Active** check box to ensure the product is available in FTD Mercury.
7. From the **Category** list, select the category for this product.
8. From the **Occasion** list, select the occasion for this product.
9. From the **Statement Category** list, select the category for this product on customer statements.
10. In the **Care Instructions** field, enter instructions on how to care for the product (if necessary).
11. In the **Bar Code** field, enter the bar code for the product (if you use a bar code reader).
12. If you have multiple stores, in the **Stores** area, select the stores that will be carrying this product. Inventory will only be monitored at the store where the product is entered in the system.
13. In the **Recipe** area, enter instructions for designing or assembling the product. These instructions will appear on the working invoice (worksheet) for the designer.
14. Click **Save**.
15. After saving the product, you can add a picture to the product by clicking **Add Picture**, and either browsing for the image or using a Logitech QuickCam Orbit AF camera to take a picture.

Adding New Products

Use the Product Entry window to provide details about a new product you are adding to your FTD Mercury database. If you enter a memorable Local Product Code, your employees will be able to enter this product much more quickly in Order Entry and Point of Sale.

Assigning Products to Designers

If you have a shop with more than one designer, you can assign designers to products using the Design Center window. Once products have been designed, you can use Design Center to mark the orders as designed.

To assign products to designers:

1. On the **FTD Mercury Main Menu**, click **Designer**. The **Design Center** window opens.
2. Enter search criteria to list tickets that have not been designed.
    » From the **Store Name** list, either select the store where the product is being designed, or select **All Stores**.
    » In the **Delivery Date** field, enter the delivery date for the orders.
    » In the assignment status options, select **Not Assigned** and **Not Delivered**. Ensure **Assigned** and **Delivered** are cleared.
3. Click **Search**. The results list displays the products that you need to assign to your designers. Each row represents a product. A ticket may include several products, and a single order may have more than one ticket, so there may be more than one row in the results area per order.
4. In the **Designer** column, from the list of available designers, select a designer for this item. If there are multiple products in the ticket that need to be assigned to designers, you are given the option to assign all products to the same designer.
5. When the product is designed, click in the **Status** column and mark the product as **Designed**. If there were multiple products in the order, you are given the option to mark all products for that order designed. Additionally, you can mark all orders currently displayed in the **Design Center** as designed by clicking **Mark All Orders Designed**.
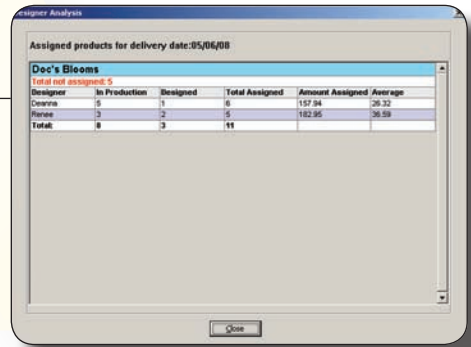
Assigning Products to Designers

Use the Design Center to manage designer assignments and mark products as designed.

In the Design Center, click Design Analysis to view a snapshot of designer assignments.

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Taking & Attaching Design Pictures

Design pictures allow you to keep pictures of arrangements created for orders. This enables you to check design quality and have photographic records of orders if customer questions arise. 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 them to tickets.

To take and attach pictures to orders 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. 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.
5. In the **Attach Pictures** area, select **Design**.
6. Take and attach the picture:
    » If you are taking and attaching the picture using a connected Logitech QuickCam Orbit AF camera:
        a. Click **Camera View**.
        b. Place the product so that it is in view of the Logitech QuickCam. If you want to change the camera settings, in the **Logitech QuickCam Toolbar**, click **Change Settings**.
        c. In the **Picture Center** window, click **Take Picture**. If you are satisfied with the picture, click **Attach** to save it. If you want to retake the picture, click **Camera View** and retake the picture, then attach it.
    » If you are attaching a picture that is already on your computer:
        a. Click **Browse**. The **Open Photo** window opens.
        b. Browse to the picture you want to attach, select it, and click **Open**.
        c. Click **Attach**.
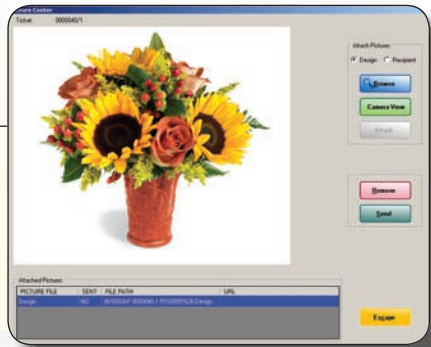7. Click **Escape** to close the **Picture Center** window.

Taking & Attaching Design Pictures

Open the Picture Center by clicking Pictures in the Design Center window.

The Picture Center window allows you to take and save design pictures.

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Selling & Activating Gift Cards

Gift cards are plastic cards printed with your store information on which you store value for a customer or recipient. You sell gift cards in Point of Sale. 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.

To sell and activate a gift card:

1. On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
2. If you are configured as a multi-store environment, from the **Store Name** list, select your store name.
3. From the **Employee** list, select your employee name.
4. In the **Customer** area, enter the customer's information or leave this blank to use the default Point of Sale customer.
5. Ensure you have selected a delivery zone (even if the zone is **N/A**).
6. Fill in the **Products** area:
   » In the **Product Code** column, enter ****Gift Card** or swipe the gift card being purchased. The **Description** field displays the number of the gift card.
   » In the **Amount** column, 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.
   » If you are offering a discount on the gift card, or giving it away free as a promotion, enter a percentage or value in the **Discount** column.
7. From the **Occasion** list, select the occasion for the purchase.
8. Click **Payment**. The **Payments** window opens.
9. In the **Payments** area, enter payment information. You can use any payment type (except Gift Card).
10. Click **Complete**.

Once the sale is complete, the gift card is activated with the balance you entered in the Amount column.

Selling & Activating Gift Cards

You can sell gift cards as you would any other product in FTD Mercury — but you must do so in Point of Sale. When you sell a gift card, you activate the gift card with the value of the purchase.

Viewing Total Daily Sales

You can generate a report of your daily sales numbers using the Balance Wizard. This report allows you to see a detailed breakdown of your daily sales by cash transactions, charges, and house accounts — enabling you to understand your incoming cash flow on any given day. You can generate reports only for data not already exported to QuickBooks; to generate reports for dates you have already exported, you need to access the GL Export History in Mercury Accounting.

To use the Balance Wizard to view total daily sales:

1. On the **FTD Mercury Main Menu**, click the **Accounting** button. The **Mercury Accounting Interface** opens.
2. Click **Balance**. The **Store Selection** panel opens.
3. From the **Store Name** list, select your store name.
4. In both the **Start Date** and **End Date** fields, enter the date for which you want to view total daily sales. By entering the same date in both fields, you restrict the report to a single day.
5. Click **Print Balance Report** to generate a report of figures for the day.
6. If you want to see sales broken down into categories on screen, click **Detail** and then click **Next**. Each subsequent panel will provide you with the option to print the report.
7. Click **Cancel** to exit the **Balance Wizard**.

Viewing Total Daily Sales

When you open the Mercury Accounting Application, click Balance to launch the Balance Wizard.

To view the sales summary for the current date, use the same date as both the Start Date and the End Date. If you select detail, you can view a breakdown of sales information in the Balance Wizard when you click Next.

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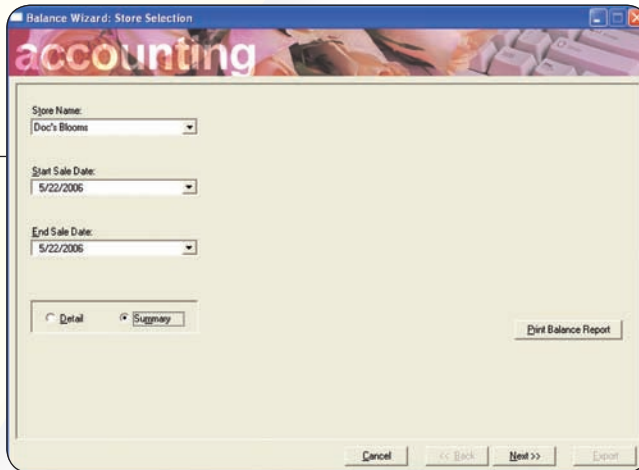
Generating Reports

FTD Mercury allows you to print several different reports to assist you in the daily operations of your shop. In addition to financial reporting functionality, reports are designed as business management tools, allowing you to get a pulse on your business operations. Each report is generated and printed in Microsoft Excel.

To generate a report in FTD Mercury:

1. On the **FTD Mercury Main Menu**, click **Business Reports**. The **Office Templates** window opens in **Windows Explorer**.
2. Double-click the **Mercury Forms** folder.
3. Double-click the report you want to generate. **Microsoft Excel** opens.
4. If a security warning appears:
   » If you are using **Office 2007**, next to the warning, click the **Options** button. When the **Microsoft Office Security Options** window opens, click Enable this content and click **OK**.
   » If you are using **Office 2003**, click **Enable Macros**.
5. In the window that opens, enter appropriate criteria for the report.
6. Click **Finish**. The report generates and opens in **Microsoft Excel**.

Generating Reports

You can access reports by clicking Business Reports on the FTD Mercury Main Menu.

After you double-click the report you want to generate, you need to configure it from the window that opens. Each report requires different information.

FTD Mercury - Sales Summary Report

Select Store | Doc's Blooms

Sale Date Range
Start Date | 3 /11/2007
End Date | 4 /11/2007

Date Type
○ Delivery Date ○ Sale Date

Finish | Cancel

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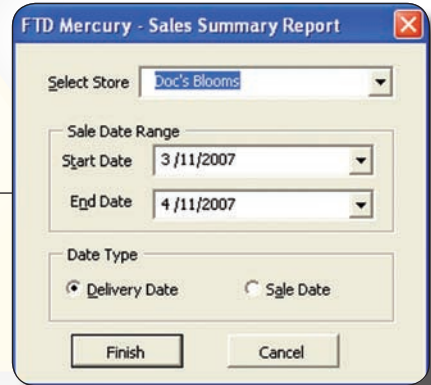
Reprinting Point of Sale Receipts

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.

To reprint a Point of Sale receipt:

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. In the **Print Output** area, ensure the **Print Receipt** check box is selected, and the **Print Invoice** check box is cleared.
5. In the **Fax Output** area, ensure the **Fax** check box is cleared.
6. In the **Email Output** area, ensure the **Email** check box is cleared.
7. 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.

Reprinting Point of Sale Receipts
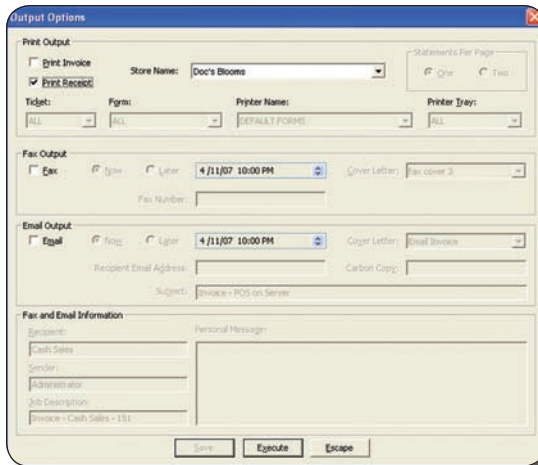
You reprint receipts by locating the original ticket in Ticket Search and then clicking Output Invoice. You then select Print Receipt in the Output Options window.

In addition to the original date and time of the transaction, the reprinted receipt includes the print date and print time and the word REPRINT at the bottom of the 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
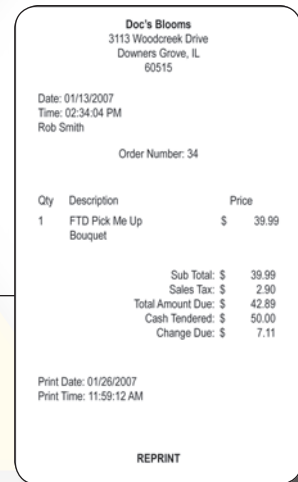
Performing a Z-Out Transaction (End of Day)

The Z-out transaction closes the Point of Sale session and prints out totals for all completed transactions so you can balance the cash drawer. Depending on your selection, a summary or detailed receipt then prints, showing the cash drawer activity for the day.

To perform a Z-out transaction at the end of the day for a Point of Sale terminal:

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.
5. In the **Z-Out Date** field, specify the date for the Z-out.
6. In the **Receipt Report** area, either click **Summary** to print a summary of the Point of Sale transactions for the session, or click **Detail** to print a receipt for every transaction performed in the session (including the opening balance transaction).
7. Click **Z-Out** to print the receipt report. The **Z-Out Amount** field displays the Z-out amount.
8. In the **Count Drawer** area, enter cash and check amounts manually, or click the dollar sign button to use the **Money Counter**.
9. Click **Save** to complete the Z-out transactions and close the Point of Sale session. The **Opening Balance** window opens, allowing you to enter the opening balance for the next Point of Sale session. If you do not want to enter the opening balance at this point, you can click **Escape**. However, your must enter an opening balance prior to beginning the next Point of Sale session.

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Performing a Z-Out Transaction (End of Day)

The Z-Out window allows you to instruct FTD Mercury to count the total sales for a Point of Sale terminal for the day. You can then count the money in your cash drawer to ensure it matches what was entered over the course of the day.

Z-Out

Authorization
Login Name: Angie
Password: ********

Z-Out Date
Z-Out Date: 4 / 1 /2008

Count Drawer
Z-Out Amount: $ 0.00
Cash Amount: $ 0.00
Check Amount: $ 0.00
Over/Under: $ 0.00

Receipt Report
● Summary ○ Detail

[X-Out] [Z-Out] [Escape]

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
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]

Use the Money Counter to help you calculate your cash drawer totals, including coins, bills, checks, and other payments (such as gift certificates).

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Checking Mercury Network Connectivity

If you are having issues sending and receiving orders via the Mercury Network, you may need to confirm your connection is working. This will assist the Mercury Technology Assistance Center (MTAC) in determining the issue. You can confirm connectivity by sending a General message to FTD and waiting for a verified copy of the message to print.

To check your connectivity to the Mercury Network:

1. On the **FTD Mercury Main Menu**, in the **Search** area, click **Message**. **Message Center** opens.
2. Click the **New Message** button. The **New Message** window opens.
3. Select the **General** option and click **OK**. The **General Message Detail** window opens.
4. In the **Filling Florist** field, enter **90-5034AA** for the florist code.
5. Click **Yes** when a message appears stating "*90-5034AA belongs to FTD, Inc. Transmit with this code?*"
6. From the **Priority** list, select **Express**.
7. In the **Text or Reason** field, enter **Test for Mercury Connection**.
8. From the **Operator** list, select your employee name.
9. From the **Sending Florist** list, ensure your store is selected.
10. 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 you do not receive a printout within 10 – 15 minutes, contact MTAC for support.

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Checking Mercury Network Connectivity

Open the Message Center from the FTD Mercury Main Menu by clicking the Message button in the Search area at the top right of the window. Once in the Message Center, click New Message.

You send the General message to 90-5034AA. Make sure you state in the Text or Reason field that this is a test for your Mercury Network connection.

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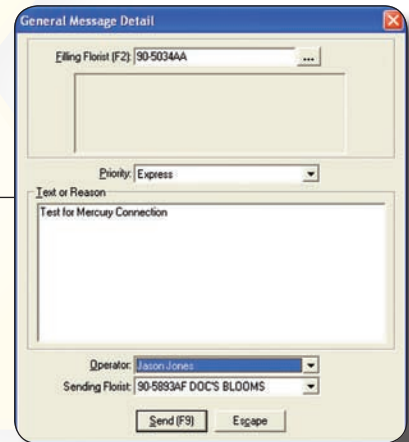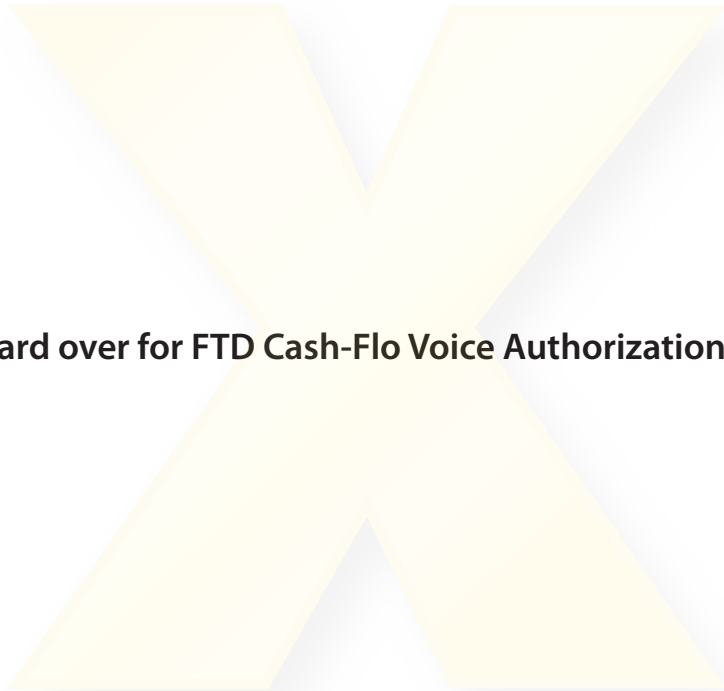
FTD Cash-Flo Voice Authorization Numbers

If you need to receive voice authorization for a credit card transaction, use the phone number for the appropriate card to receive authorization for the payment. After receiving voice authorization over the phone, enter the order in FTD Mercury, including the authorization code you received over the phone.

Credit Card	Telephone Number	Bank Number	Merchant ID Number
Visa/MasterCard	1-800-944-1111	097700	3830 + Your FTD # + 88*
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 FTD Mercury terminal number is usually 88. If you are unsure of your terminal number, check your monthly Confirmation of Credit Cards report. The first two digits on any transaction line item is your terminal number.

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FTD Cash-Flo Voice Authorization Numbers

Flip this card over for FTD Cash-Flo Voice Authorization Numbers.

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Daily Checklist

At the beginning of the day, perform these tasks:

» 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.

» Set the opening balance for each Point of Sale terminal.

During each day, perform these tasks:

» Use Ticket Search to check for pending orders, particularly orders that are pending due to credit card authorization.

» Check to see if you have incomplete orders and process them.

» 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.

» Check for any credit card errors or declined credit card transactions.

For end-of-day tasks, see the other side of this card…

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Daily Checklist

At the end of each day:

» Verify all incoming wire orders have been attached.

» 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.

» Ensure all orders have been marked as Designed in Design Center.

» For Mercury Delivery users, verify all orders have been marked as delivered.

» 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.

   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.

» Prepare your bank deposit.

» Run the Balance Report using the Balance Wizard in Mercury Accounting. Print any pages you need for your records.

» Double-check your backup media (Zip disk or USB thumb drive) in place for your server.

For other daily tasks, see the other side of this card…

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Weekly Checklist

Although you can complete these tasks at any time, FTD suggests you do so 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.

To run a Symantec AntiVirus Live Update:

1. On the **Windows Start** menu, point to **All Programs**, then to **Symantec Client Security**, and click on **Symantec AntiVirus**.

2. Click **Live Update**.

3. Follow the on-screen instructions to update your virus definitions.

For monthly tasks, see the other side of this card…

Monthly Checklist

On a monthly basis, you should perform these tasks:

- » Print the Aged Analysis report (you should also save an electronic copy of it). Review the report to ensure it is accurate, and make any necessary corrections to accounts.
- » Generate customer statements.
- » When you receive your Combined Report, perform wire reconciliation.
- » Print the Sales Tax report.
- » Print the Sales Summary report.
- » Print any other applicable reports.
- » Complete a General Ledger export.
- » Run a Windows Update.

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.

For weekly tasks, see the other side of this card…

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Glossary

Aged Analysis Report
Report that provides an analysis of your customer account balances.

Automatic Order Processing (AOP)
Feature that allows FTD Mercury to automatically process inbound Mercury, Flowers Online, Flowers All Hours, and Web orders if all necessary information is included in the order.

Balance Forward Accounting
Customers with this type of house accounts receive statements that show running unpaid balances. As payments are made, the payment amount is applied to the oldest invoice.

Balance Wizard
Allows you to view or print your sales information for a given date range and, if you have Mercury Accounting, export it to QuickBooks.

C.O.D. Order
Orders that are paid for when the order is delivered or picked up.

Communications Alert
Received if FTD Mercury cannot connect to the Mercury Network. It is usually caused by a problem with your Internet connection. If you can connect to the Internet when you receive this alert, contact the Mercury Technology Assistance Center.

Credit Memo
Allow you to apply credit to a customer's house account (for example, if a customer returns an item purchased on their account).

Debit Memo
Allow you to apply a debit to a customer's house account (for example, to add a miscellaneous charge to the customer's account).

Delivery Code
Allows you to flag an order as delivered or not delivered.

Design Pictures
Pictures you can take and attach to orders to show what was designed for the customer.

Distance Map
Tool that allows you to see the location of potential filling florists in relation to the recipient for a wire out order. This can help you select the best florist to fill the order.

Funeral Log
Tool that allows you to enter in details about funerals and use that information to populate recipient information in tickets. Also can be used to generate a list of items to provide to the funeral director or deceased's family.

General Message
Allows you to communicate with other Mercury Members and FTD Personnel. The General (GEN) message does not link with an order or order-related messages in Message Center.

Gift Cards
Plastic cards you can sell to customers and can be used as payment for goods in your store. You can also provide store credit on these cards.

House Account
An account used to extend credit from your store to a customer. When the customer purchases items from your store, they are charged to the customer's house account, and the customer provides payment when you send an invoice or statement.

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Glossary

Map It
Tool that allows you to see how far a recipient is from your shop.

Message Center
Allows you to view all incoming and outgoing messages sent over the Mercury Network for your shop. Also allows you to search for messages and view any related messages between you and other florists.

One-Click Refund
A refund created by locating the original ticket or sale using Ticket Search, right-clicking on it, and editing the resulting Refund Sale.

Open Item Accounting
Accounting where as each payment is made, it is applied to an individual ticket. Typically used by companies or customers who pay by invoices.

Phoned-In Order
An order that is phoned to your shop by an FTD florist who does not have Mercury technology in their store. You must report phoned-in orders via an REC Message List to receive payment.

Point of Sale (POS)
FTD Mercury system connected to the cash drawer and receipt printer. You typically enter orders from walk-in customers on this system.

REC Message List
Reports incoming orders that were received via phone from other Mercury Network florists. Use this message to report these orders to FTD so you can receive payment for them.

Recipient Pictures
Pictures you can send to a customer, or a filling florist can provide to the sending florist.

Router
Hardware that allows multiple computers to use the same Internet connection.

Sales Summary Report
Report that lists the total sales summary for your store for a given date range. Also prints outgoing and incoming sales according to wire service.

Send To Codes
Also known as abbreviation codes, these are shortcuts that allow you to quickly enter in card messages and recipient addresses. You can configure them in Mercury Administration.

Server
The computer that contains the shared information for all of your FTD Mercury systems.

Standing Order Templates
Used to create orders that recur on a set schedule.

Ticket Search
Tool used to locate previously created orders.

Wire Out Order
Orders sent over the Mercury Network to another Mercury florist.

Z-Out Transaction
Closes the current Point of Sale session and prints out totals for all completed transactions so the cash drawer can be balanced. A Z-out is usually performed at the end of the day.

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