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Mercury Administration

The Mercury Administration program allows you to change your program settings such as delivery zones, house account defaults, and printer routing. Some of these settings were set up in the Store Setup Wizard when you initially configured your system.

The Mercury Administration window is divided into a left pane and a right pane, with the left pane displaying the main categories maintained in the Mercury Administration program. The Accounting, Communication, Delivery, Employee, Security, Store, System, and Wire Service folders contain the customizable features. The right pane displays the contents of the folders you have chosen by clicking in the left pane.

When you apply changes to the Mercury Administration program, you receive the following message if you are running the FTD Mercury application software:

```
Changes have been made to the FTD Mercury program settings. For these changes to
take effect you must close and then manually restart the application. Would you like
to close this application now?
```

Click **Yes** to close the FTD Mercury application and then restart the application so that your change in Mercury Administration can be applied to the program. If you click **No**, you can continue to use FTD Mercury, however the change that you made in Mercury Administration is not applied until you later close and then re-open the program.

Mercury Administration Interface

The Mercury Administration interface is divided into two sections. The left pane, called an explorer, is structured like a tree (similar to Windows Explorer). When you select an item in the explorer, its contents appear in the right pane. The explorer also can expand and contract items when you click the + or – next to a folder name.

Navigation

The Mercury Administration program is used to set up or change program settings in your FTD Mercury software. Some items in the Mercury Administration program were set up in the Store Setup Wizard when you set up FTD Mercury for the first time. The preferences/settings that you specified in the Wizard have become your system defaults.

Should you wish to use the keyboard to navigate through the windows in Mercury Administration, remember that the SPACEBAR is used here as the ENTER key is used in the FTD Mercury program. For example, as you TAB through each field and enter your changes, once you reach the bottom of a window and the Apply button appears with a black, dotted box around the text, press the SPACEBAR to apply your changes. The same applies to the Undo button.

The Apply and Undo buttons work somewhat differently than their Save and Escape counterparts in the FTD Mercury program. For example, if you make a change in the Dunning Message window and do not click Apply before opening another window, the change is not saved. Therefore, it is important that you click the Apply button to save any changes you have entered before you exit from a window. Also, the Undo button can undo only unsaved (or unapplied) changes.

Toolbars

Toolbars are icons displayed at the top of the window. Toolbars in Mercury Administration change according to which option you are working in.

For example, when you are working in the Employee option, the toolbar looks like this:

Figure 24-1: Employee Toolbar

When you are working in the Job Functions option, the job function toolbar looks like this:

Figure 24-2: Job Function Toolbar

Notice the icons on the toolbar have changed. The first toolbar contains an button that allows you to add a new employee, while the second toolbar contains an button that allows you to add a new job function. Familiarize yourself with the working environment by studying the menus, toolbars, and the system navigation.

Resources for Help

The Mercury Administration program has help resources similar to those in the FTD Mercury program. Should you have an Mercury Administration usability issue, the following resources may be helpful to you:

» Check the Table of Contents and/or Index of this reference guide for the topic for which you need assistance. You can access an online version of the manual by double-clicking the FTD Mercury Manual icon on your computer's desktop.

» Use Mercury Administration Online Help to search for your topic. Click ▨ in the Menu Bar to access help.

» Press **F1** to display a help page.

» Use Mercury Administration Field help. If you need help with a particular field, right-click on that field to display help text. A brief explanation of that field displays and describes how it is used in the screen.

» If you cannot resolve your issue using the methods listed above, you can call the Mercury Technology Assistance Center for assistance. See FTD Mercury Technical Support on page 1–4.

Logging into Mercury Administration

Mercury Administration is accessible only on the server. When you make changes in the program, you are instructed to restart FTD Mercury on the server and any client computers so changes can take effect.

TASK **To access the Mercury Administration program if you are logged into FTD Mercury:**

On the **Tools** menu, click **Mercury Admin**.

TASK **To access the Mercury Administration program if you are not logged into FTD Mercury:**

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

Double-click Mercury Administration in the left pane to display different folders, from which you can access different areas in Mercury Administration.

The Mercury Administration interface is divided into two sections. The left pane, called an explorer, is structured like a tree (similar to Windows Explorer). When you select an item in the explorer, its contents appear in the right pane. The explorer also can expand and contract items when you click the + or – next to a folder name.

Accounting Folder

The following screens are accessible from the Accounting folder:

» HouseAccount Screen
» Dunning Message Screen
» Questions Screen
» Credit Cards Screen
» Debit Cards Screen
» Tax Code Screen
» GL Export Screen
» POS Setting Screen
» Marketing Screen
» StoreTransfer Screen

HouseAccount Screen

When setting up a house account for a customer, you must specify a credit limit, how you want to bill the customer, what type of account you want to open, and how you want to apply finance charges. To set a consistent billing pattern, you may set up house account defaults in Mercury Administration. These defaults make entry time quicker, but still can be changed at time of entry.

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

Figure 24-3: HouseAccount Screen

You can configure the following settings in the HouseAccount screen:

Table 24-1: HouseAccount Settings

Setting	Description
Credit Limit	Enter a default maximum dollar amount of credit to extend to your customers.
Billing Cycle	Click the arrow and select the default cycle at which you want to bill your customers
Default Payment	Click the arrow and select the default payment method for house payment accounts.
Annual Finance Charge	Enter the default percentage at which you want to apply finance charges to customer accounts. Finance charges are applied per billing cycle.
Minimum Finance Charge	Enter a dollar amount you want to charge as the minimum finance charge for overdue accounts. The system selects either the finance charge percentage in the Annual Finance Charge field or the amount you enter here, whichever is greater.

Table 24-1: HouseAccount Settings (cont.)

Setting	Description
Finance Grace Period	Click the arrow to select the default number of days you want to wait before assessing finance charges to customer accounts.
Finance Cycle	Click the arrow to select the cycle at which you want to assess finance charges.
Accounting Type	Select either Balance Forward Accounting or Open Item Accounting. » **Balance Forward Accounting**—Customers with Balance Forward accounts receive statements that show running unpaid balances. As payments are made, the payment amount is subtracted from the oldest invoice. » **Open Item Accounting**—Use Open Item accounts for corporations and companies that pay by invoice (or other customers that prefer to do so). As each payment is made, the payment is applied to an individual ticket.
Email Statements	Select this option to configure house accounts by default to email statements to customers automatically when the statements are generated.
Fax Statements	Select this option to configure house accounts by default to fax statements to customers automatically when the statements are generated.
Print Statements	Select this option to configure house accounts by default to print statements to mail to customers.
Print Dunning Messages	Select this option to automatically print dunning messages at the bottom of statements when they are generated.
Terms on Account	Type any additional text you wish to be printed on customer statements. For example, **Receive a 5% discount if you pay within 10 days**.

Accessing the HouseAccount Screen

TASK   **To access the HouseAccount screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Accounting** folder.
4 Double-click **HouseAccount**. The **HouseAccount** screen opens.

Setting Up House Account Defaults

TASK   **To set up house account defaults:**

1 In Mercury Administration, access the **HouseAccount** screen.
2 In the **Credit Limit** field, enter a default maximum dollar amount of credit allowed for your customers.
3 From the Billing Cycle list, select the default billing cycle for your customers with house accounts.
4 From the Default Payment list, select your preferred payment method for house account payments.
5 In the **Annual Finance Charge** field, enter the default percentage at which you want to apply finance charges to customer accounts. Finance charges are applied per billing cycle.
6 In the **Minimum Finance Charge** field, type a dollar amount that you want to charge as the minimum finance charge for overdue accounts. The system selects either the finance charge percentage in the **Finance Charge** field or the amount you enter here, whichever is greater.

7   From the **Finance Grace Period** list, select the default number of days you want to wait before assessing finance charges.

8   From the **Finance Cycle** list, select the cycle at which you want to assess finance charges.

9   Select whether, by default, house accounts will be created using **Balance Forward Accounting** or **Open Item Accounting**.

10 Set the defaults for statements, including whether you want to print, fax, and/or email statements, and whether you want to print dunning messages on statements for house accounts.

11 In the **Terms on Account** field, type any additional text you want to be printed on customer statements.

12 Click **Apply** to save the information before exiting this screen.

Dunning Message Screen

Dunning messages are reminders of payment that appear on a customer's statement. You may set up your own default messages for current customer statements or statements for customers that are 30, 60, 90, or 120+ days past due. When these dunning messages are set up, they appear on all customer statements. If you would not like dunning messages to appear on a specific customer statement, you may clear the Print Dunning Message option in the House Account tab of the Customer Detail Information window for that customer.

Figure 24-4: Dunning Message Screen

You can configure the following settings on this screen:

Table 24-2: Dunning Message Settings

Setting	Description
Current	Enter the dunning message you want to use if the customer account is current.
30 Days Late	Enter the dunning message you want to use if the customer account is 30 days late.
60 Days Late	Enter the dunning message you want to use if the customer account is 60 days late.
90 Days Late	Enter the dunning message you want to use if the customer account is 90 days late.
120+ Days Late	Enter the dunning message you want to use if the account is 120 days or more late.
Finance Charge Title	Enter the name of the line item you want to use on statements for the finance charge. For example, instead of calling it a Finance Charge, you may want to call it a Rebilling Fee.

Accessing the Dunning Message Screen

TASK **To access the Dunning Messages screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Accounting** folder.
4 Double-click **Dunning Messages**. The **Dunning Messages** screen opens.

Configuring Dunning Messages

TASK **To configure dunning messages:**

1 In **Mercury Administration**, access the **Dunning Messages** screen.
2 Type the dunning messages you want to include on each statement type in the appropriate text boxes.
3 In the **Finance Charge Title** field, enter how you want the finance charge to be itemized on statements.
4 Click **Apply** to save your changes.

Questions Screen

User questions, such as **How did you find out about our store?**, are the questions that you want your employees to ask each customer. These questions are displayed in the Order Entry Payments window or the Customer Detail Information window (whichever you specify). These questions help you gain valuable customer information.

Figure 24-5: Questions Screen

Question	Type	Active
How did you hear about our store?	Customer	☑
Would you like to be on our mailing list?	Customer	☑
	Customer	☐

Apply   Undo

For each question, you need to set up the following:

Table 24-3: Questions Screen Settings

Setting	Description
Question	Enter the question you want your employees to ask each customer.
Type	Select whether you want the question to be asked in the Customer Detail Information window or in Order Entry on the Payment window.
Active	Select the check box if you want this question to be active in your system. If the box is not selected, the question will remain in your question list, but it will not display in the Customer Detail Information or the Order Entry Payment window until you activate it.

Accessing the Questions Screen

TASK   **To access the Questions screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Accounting** folder.
4   Double-click **Questions**. The **Questions** screen opens.

Adding User Questions

TASK   **To add user questions to your system:**

1   In **Mercury Administration**, access the **Questions** screen.

2   Click inside of a blank cell in the **Question** column and type a question.

3   In the type column, select if you want this question to appear in Order Entry (in the Payment window) or in the Customer Detail Information window.

4   Select the **Active** check box for questions that you want to use.

5   Click **Apply** to save the information before exiting this screen.

Credit Cards Screen

The **Credit Cards** screen (formerly the **Settlement** screen) in Mercury Administration allows you to configure your credit card and gift card processing settings if you are a member of the FTD Cash-Flo program. You can also specify whether you process credit cards over the Internet, or you use direct dial access In order to process gift cards, you must process over the Internet.

Figure 24-6: Credit Cards Screen

The Credit Cards screen contains the following settings:.

Setting	Description
Communication Method	Select whether you use Direct Dial Access or Internet Access. If you select Direct Dial access, the Account Information group becomes active, allowing you to configure direct dial account information for the selected store. If you select Internet Access, you can configure the CCAPI account information (credit cards over the Internet).
	You cannot change the Communication Method if there are unsettled or pending transactions in FTD Mercury. You need to also remove any previously declined credit card transactions.
	IMPORTANT: You must have already set your Internet Connection Type to Always Online in the Internet screen in Mercury Administration to configure and use credit cards and gift cards over the Internet.
	This setting affects all clients connected to this server.
Host Address	This value is used when you process credit cards and gift cards over the Internet. By default it is set to https://paymentgateway.mercurynetwork.com/creditcardapi/webapi/CreditCardService.asmx. You should not change this value except when directed to by the Mercury Technology Assistance Center.
Store Name	Select the store for which you are configuring credit card or gift card processing information. You must configure settings for each store separately, although once you make the settings for one store and then select a different store, settings from the first store are retained until you click the Undo button.
Merchant ID	Enter your Merchant ID number in this field. This is a number provided by FTD Cash-Flo personnel. If you do not have a Merchant ID, contact Member Services at 1-800-788-9000 to obtain one.
Terminal ID	Enter the Terminal ID given to you by Global Payments (NDC).
Merchant Category Code	Enter the Merchant Category Code given to you by Global Payments (NDC).
Account ID	Enter your account ID as provided to you by FTD for processing credit cards and gift cards over the Internet.
Account Password	Enter the account password provided to you by FTD. Your password will be masked during entry for security.
Confirm Password	Reenter your password, which will be masked for security.
Expiration Period (Months)	Enter the number of months that new or reloaded gift cards will be valid. The default number of months, 0, means that gift cards do not expire.

Once you have made changes to credit card processing information, click Apply before exiting this screen. If you change the Communication Method or Host Setting, you are required to perform an FTDShutdown and then an FTDStartup to apply these changes.

Accessing the Credit Cards Screen

TASK   **To access the Credit Cards screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Accounting** folder.
4   Double-click **Credit Cards**. The **Credit Cards** screen opens.

Configuring Credit Card and Gift Card Processing over the Internet

Beginning with version 7.1, FTD Mercury allows you to process credit cards over the Internet. Mercury X allows you to also process gift cards using the same functionality that supports credit card processing. This functionality requires a high-speed Internet connection (DSL, broadband, etc.). You must have already set your **Internet Connection Type** to **Always Online** in the **Internet** screen in **Mercury Administration** to configure and use credit cards over the Internet.

Prior to switching to credit card processing over the Internet, you must have settled all outstanding credit card transactions and removed any declined transactions. For more information, see Credit Cards over the Internet on page 13–1.

TASK   **To configure FTD Mercury to process credit cards and gift cards over the Internet:**

1   In **Mercury Administration**, access the **Credit Cards** screen.
2   In the **Communication Method** area, select **Internet Access**. The **Host Settings** area and the **CCAPI Account Information** area are enabled.

IMPORTANT   If your connection type, set in the Internet screen, is not **Always Online** you will receive a warning message that you need to configure this prior to enabling credit card processing over the Internet.

---

3   The value in the **Host Address** field is already configured. Do not change it unless directed to by the Mercury Technology Assistance Center.
4   In the **Account ID** field, enter your account ID as provided by FTD.
5   In the **Account Password** field, enter your account password. The password will be masked with asterisks (*) for security.
6   In the **Confirm Password** field, reenter your account password.
7   Click **Apply** to save your changes before exiting this screen.

Because you changed the **Communication Method**, you will need to perform an **FTDShutdown** and an **FTDStartup**.

TIP   If you are setting up multiple stores for processing credit cards over the Internet, after you have set up the first store and applied your changes, change the **Store Name** to the next store. The settings from the first store will be retained (unless you click **Undo**), and you can begin your configurations from that point.

Configuring Credit Card Processing Using Dial Up Access

TASK   **To configure FTD Mercury to process credit cards using dial up access:**

1   In **Mercury Administration**, access the **Credit Cards** screen.
2   If you have multiple stores, click the arrow and select your store name from the **Store Name** list.
3   In the **Merchant ID** field, enter your Merchant ID number. This is a number provided by FTD Cash-Flo personnel. If you do not have a Merchant ID, contact Member Services at 1-800-788-9000 to obtain one.

4   In the **Terminal ID** field, enter the terminal ID number given to you by Global Payments (NDC).

5   In the **Merchant Category Code** field, enter the merchant category code given to you by Global Payments (NDC).

6   Click **Apply** to save the information before exiting this screen.

Maintaining Your Credit Card over the Internet Account

When you sign up for processing credit cards over the Internet, FTD will provide you a user ID and password. You can then use the maintenance link in the Credit Cards screen in Mercury Administration to maintain your account. You will be required to update your account password when you first log into the account; you will use your user ID and password in Mercury Administration to configure credit card processing.

The maintenance link launches your Web browser, displays the credit card maintenance login, and allows you to log in to change your password or request a callback from FTD regarding credit card processing.

Setting the Gift Card Expiration Period

By default, FTD Mercury does not set an expiration date for the gift cards that you sell. If you want gift cards to be valid for a specific number of months, you must enter the number of months in the Expiration Period (Months) field in the Credit Cards screen. Expired gift cards cannot be used for payment and expired gift cards cannot be reloaded.

TASK   **To set the gift card expiration period:**

1   In **Mercury Administration**, access the **Credit Cards** screen.

2   If you have multiple stores, click the arrow and select your store name from the **Store Name** list.

3   In the **Expiration Period (Months)** field, enter the number of months that gift cards will be valid.

4   Click **Apply** to save the information before exiting this screen.

Debit Cards Screen

The **Debit Cards** screen allows you to configure settings for accepting debit cards in FTD Mercury. You must be licensed to use debit cards to change information on this screen. For information on purchasing a license and PIN pad hardware from FTD, contact Mercury Technology Sales at 1-800-767-3222.

If your system is licensed for debit card processing in FTD Mercury, the Point of Sale system will check for the presence of the PIN pad device each time Point of Sale is started. If the PIN pad device is not detected, FTD Mercury will warn you and disable debit card payments for the session; the Payments window will not allow you to select Debit as the payment type.

TIP   You can disable the warning message in the **FTD Mercury Configuration** window.

Figure 24-7: Debit Cards Screen

This screen contains the following settings:

Table 24-5: Debit Cards Screen Settings

Setting	Description
Store Name	Select the store name for which you are configuring debit card processing settings. You must configure this separately for each store that will accept debit card transactions.
HTML Debit	Enter the value provided by Mercury Technology Sales.
Developer Debit	Enter the value provided by Mercury Technology Sales.

When you have finished making changes, click **Apply** before exiting this screen. You can also click **Undo** to revert to the previously saved configuration.

Accessing the Debit Cards Screen

TASK   **To access the Debit Cards screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Accounting** folder.
4 Double-click **Debit Cards**. The **Debit Cards** screen opens.

Configuring Debit Cards Screen Settings

TASK   **To configure Debit Screen settings:**

1 Access the **Debit Cards** screen in **Mercury Administration**.
2 From the **Store Name** list, select the name of the store for which you are configuring debit card processing settings.
3 In the **HTML Debit** field, enter the HTML Debit value provided to you by Mercury Technology Sales.
4 In the **Developer Debit** field, enter the Developer Debit value provided to you by Mercury Technology Sales.
5 Click **Apply** to save your changes before exiting this screen.

IMPORTANT   If you have multiple stores, you need to configure settings for each store separately.

Tax Code Screen

If you are using the Order Entry, Point of Sale, and/or Accounts Receivable modules, the Tax Code screen allows you to set up your tax codes and percentages into the system. You may enter tax rates up to three digits past the decimal point, for example, 6.375. The Mercury Administration program performs its rounding based on the third decimal place. Refer to the valid codes for your shop.

Figure 24-8: Tax Code Screen

Tax 1 Label:	Sales Tax	
Tax 2 Label:		

Description	Sales Tax	Tax 2	Rounding	Tax Code	Tax On Tax
IL Sales Tax	6.500	0.000	4-5 Split	IL	☐
Tax Exempt	0.000	0.000	4-5 Split	TE	☐
Cash Sales	0.000	0.000	4-5 Split	CS	☐
Interstate Commerce	0.000	0.000	4-5 Split	IC	☐
Not Applicable	0.000	0.000	4-5 Split	NA	☐
No Tax	0.000	0.000	4-5 Split	NT	☐
			4-5 Split		☐

Apply   Undo

The Tax Code screen contains the following settings:

Table 24-6: Tax Code Screen Settings

Setting	Description
Tax 1/Federal Tax Label	For U.S. systems, this field is labeled Tax 1; for Canadian systems, this field is labeled Federal Tax.
	Enter the label you want to use for your first tax/federal tax. For U.S. systems, this is usually set to Sales Tax or State Sales Tax. For Canadian systems, this is usually set to GST or HST, depending on whether your store is located in a GST or HST province.
	This label is used in the grid below the labels in the third column, in sales tax reports, and in some other windows in FTD Mercury where sales tax is listed.

Table 24-6: Tax Code Screen Settings (cont.)

Setting	Description
Tax 2/Provincial Tax Label	For U.S. systems, this field is labeled Tax 2; for Canadian systems, this field is labeled Provincial Tax.
	In most cases, if you are a U.S. store, you will leave this field blank. The exception is when you have to collect taxes for a smaller taxing authority, such as a county or city. In this case, label this as City Sales Tax, or similar. For Canadian shops, this should either be QST (for Quebec), or PST for all other provinces.
	This label is used in the grid below the labels in the third column, in sales tax reports, and in some other windows in FTD Mercury where sales tax is listed.
Description	Enter the name of the tax code in the Description column.
Tax 1/Federal Tax	Enter the tax rate for your tax 1/federal tax.
Tax 2/Provincial Tax	Enter the tax rate for your tax 2/provincial tax.
Rounding	Select how the tax amounts should be rounded. Consult your state or provincial tax authority for regulations concerning rounding sales tax amounts. You can choose from the following options: » 4-5 Split—This rounds the tax amount down if the third digit following the decimal is a 4 or less (for example, if the tax amount is $5.244, the tax would appear as $5.24). Or, it rounds the tax amount up if the third digit following the decimal is a 5 or greater (for example, if the tax amount is $5.245, the tax would appear as $5.25). » 5-6 Split—This rounds the tax amount down if the third digit following the decimal is a 5 or less (for example, if the tax amount is $5.245, the tax would appear as $5.24). Or, it rounds the tax amount up if the third digit following the decimal is a 6 or greater (for example, if the tax amount is $5.246, the tax would appear as $5.25). » Truncate—This cuts off the tax amount after the second number following the decimal; the third digit is not considered. For example, if the tax amount is $5.244 or $5.247, the tax would appear as $5.24 in both cases. » Round Up—This rounds the tax amount up regardless of the third digit following the decimal. For example, if the tax amount is $5.242, the tax would appear as $5.25.
Tax Code	Enter a short abbreviation for the tax code. Typically, this should be two to three characters in length.
Tax on Tax	If you are required, select Tax on Tax to apply tax 2/provincial tax on top of the tax 1/federal tax percentage.

Once you have finished entering and modifying the tax codes, click Apply to save your changes before exiting this screen.

Accessing the Tax Code Screen

TASK   **To access the Tax Codes screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Accounting** folder.
4 Double-click **Tax Code**. The **Tax Code** screen opens.

Configuring Tax Codes

1 In **Mercury Administration**, access the **Tax Codes** screen.

2 In the **Tax 1/Federal Tax Label** field, enter `Sales Tax` if your store is located in the U.S. or either `GST` or `HST` (depending on your province type) if your store is located in Canada.

3 In the **Tax 2/Provincial Tax Label** field, leave this field blank if your store is located in the U.S. (unless you have a city or county taxing authority—in this case, enter the taxing authority name and the word tax, for example `Chicago Tax`). If you are a Canadian store, enter QST if you are in Quebec, or enter PST for all other Canadian provinces

4 Click **Apply** to save your tax labels in their appropriate columns.

5 In the **Description** column, type in each cell a tax type you must assess (for example, "IL State Tax") as well as a tax type for exempt products. See Typical Tax Codes on page 24–16 for details.

6 In the **Sales Tax** or **GST/HST** column, enter the percentage at which the tax type must be assessed.

7 In the **PST** or **Tax 2** column, enter any additional tax percentage(s) that must be assessed (if applicable).

8 In the **Rounding** column, select the rounding method for this tax code.

9 In the **Tax Code** column, type a tax code abbreviation

10 Click the **Tax on Tax** check box if your province or taxing authority requires it.

11 Click **Apply** to save the information before exiting this screen.

Typical Tax Codes

You will typically set up the following tax codes:

Table 24-7: Typical Tax Codes

Tax Code	Description
Local Tax Code	Typically, this is either your state sales tax (U.S.) or GST or HST (for Canadian shops, depending on your province type.
Interstate Commerce	In the U.S., this is used for wire out orders. In Canada, this is used for wire out orders to the U.S. In both cases, there should be no taxes on this tax code.
Not Applicable	Used for Paid Out transactions, No Sale transactions, and Finance Charges. There should be no taxes on this tax code.
No Tax	Used for non-taxable products. There should be no taxes on this tax code.
Tax Exempt	Used for churches and non-taxable organizations. There should be no taxes on this tax code.
GST no PST	(Canadian shops only) Used when sending wire orders to PST provinces.
HST no PST	(Canadian shops only) Used when sending wire orders to HST provinces.

GL Export Screen

IMPORTANT   This information only applies if you have the legacy General Ledger software (and you do not have the Accounting Module). If you have the Accounting module, all General Ledger functions are accessed from Accounting on the FTD Mercury Main Menu.

If you are using the General Ledger module, the GL Export option allows you to set up the default bank, wire service, and credit card accounts you have set up in your third party accounting software so files are exported to the proper account. Refer to your third party accounting software manual

and GL Chart of Accounts for instructions on how to set up your accounts. Please be sure to consult the special setup procedures required to run Peachtree and QuickBooks beginning with Setting Up Your System for General Ledger Export on page 21–1 before you start the import process.

The GL Export Screen contains the following settings:

Table 24-8: **GL Export Screen Settings**

Setting	Description
Name	Click the arrow and select the store for which you wish to maintain GL accounts.
Export File Type	Click the arrow and select the third-party accounting software to which you wish to export files.
Export File Path	Enter `C:\General.csv`.
Accounts Receivable	Enter the account number in your third-party accounting software for the Accounts Receivable account.
Cash On Hand	Enter the account number in your third-party accounting software for the Accounts Receivable account.
Sales Tax Payable 1	Enter the account number in your third-party accounting software for the Accounts Receivable account.
Sales Tax Payable 2	Enter the account number in your third-party accounting software for the Accounts Receivable account.
Bad Debt	Enter the account number in your third-party accounting software for the Bad Debt account.
Finance Charge	Enter the account number in your third-party accounting software for the Finance Charge account.
Cash Register Over/Short	Enter the account number in your third-party accounting software for the Cash Register Over/Short account.
Gift Certificate Redeemed	Enter the account number in your third-party accounting software for the Gift Certificate Redeemed account.
Wire Service	Click the arrow, and choose the wire service account you are maintaining.
Receivable Account	Enter the account number in your third-party accounting software for the Receivable account.
Payable Account	Enter the account number in your third-party accounting software for the Payable Account account.
Commissions Income Account	Enter the account number in your third-party accounting software for the Commissions Income account.
(Credit Card Account Numbers) Type	Click the arrow, and choose the credit card type for which you are creating an account
Receivable Account	Type the accounts receivable credit card account number for the card type you chose.
(POS Paid Out/In Types) Type	Click the arrow and select a Paid Out/In type (see Paid Out/In Types Screen on page 24–75 to learn how to set up Paid Out/In types).
Account	Enter the General Ledger account number for the Paid Out/In type you selected.

Accessing the GL Export Screen

TASK   **To access the GL Export screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Accounting** folder.
4   Double-click **GL Export**. The **GL Export** screen opens.

Configuring GL Export Options

TASK   **To configure GL Export options:**

1   Access the **GL Export** screen in Mercury Administration.
2   Click the arrow in the **Name** field and choose the store for which you wish to maintain GL accounts.
3   In the **Export File** area:

   a.   Click the arrow in the **Export File Type** field, and choose the third party accounting software to which you wish to export files.

   b.   In the **Export File Path** field, type `C:\General.csv`.

4   In the **Account Numbers** area, type the third party accounting software account numbers for each of the following account types in their appropriate fields:

   »   Accounts Receivable
   »   Cash On Hand
   »   Sales Tax Payable 1
   »   Sales Tax Payable 2 (if applicable)
   »   Bad Debt
   »   Finance Charge
   »   Cash Register Over/Short (POS)
   »   Gift Certificates Redeemed

5   In the **Wire Service Account Numbers** area:

   a.   Click the arrow, and choose the wire service account you are maintaining.

   b.   Type the third party accounting software wire service account numbers for each of the following account types in their appropriate fields:

      »   Receivable Account
      »   Payable Account
      »   Commissions Income Account

   c.   Repeat for all wire service accounts of which you are a member.

6   In the **Credit Card Account Numbers** area:

   a.   Click the arrow, and choose the credit card type for which you are creating an account.

   b.   Type the accounts receivable credit card account number for the card type you chose in step a, above, in the Receivable Account field.

   c.   Repeat for all credit card types.

7   In the **POS Paid Out/In Types** area:

   a.   In the **Type** field, click the arrow and select a Paid Out/In type (see to learn how to set up Paid Out/In types).

   b. In the **Account** field, type the General Ledger account number for the Paid Out/In type you
   selected.

   c. Repeat steps a and b for all your **Paid Out/In** types.

8 Click **Apply** to save the information before exiting this window.

POS Setting Screen

The POS Setting option allows you to create default settings for Point of Sale. By default, all POS
sales have a "cash sales" customer. This screen allows you specify a default customer for each pay
type, and specify whether you want the drawer to open. This screen also allows you to type a
message that prints at the bottom of your receipts.

Figure 24-9: POS Setting Screen

The POS Setting screen contains the following settings:

Table 24-9: POS Setting Screen Settings

Setting	Description
Payment Type	The name of the payment type.
Open Drawer	Select this box if you want the cash drawer to open for this type of payment.
Default Customer	Enter the name of the default customer for this type of payment. In most cases, you want this set to Cash Sales for your Point of Sale system.
Num Signature Receipt	For Credit and House payment types, select how many signature receipts will print when the transaction is complete.
Receipt Trailer	Enter any text you want to include on the bottom of your receipts.

When you have finished making changes, click Apply to save them before leaving this screen.

Accessing the POS Setting Screen

TASK **To access the POS Setting screen in Mercury Administration:**

1 Launch **Mercury Administration**.

2 Double-click **Mercury Administration** in the explorer pane.

3   Double-click the **Accounting** folder.

4   Double-click **POS Setting**. The **POS Setting** screen opens.

Configuring POS Settings

TASK   **To configure POS settings:**

1   In **Mercury Administration**, access the **POS Setting** screen.

2   For each payment type, set whether you want the drawer to open, the default customer, the number of receipts you want printed, and the number of receipts for signature you want printed.

3   In the **Receipt Trailer** field, enter any information you want included on the receipt.

4   Click **Apply** to save your changes before exiting this screen. Upon clicking **Apply** and saving your changes, the system checks to make sure that the customer accounts you entered in the **Default Customer** column exist. If they do not exist, the system warns you to change the customer. Make sure that you typed the account correctly or that the customer account has been created.

Marketing Screen

The Marketing screen in Mercury Administration allows you to set up marketing categories for your customers. Marketing categories help you market to your customers more efficiently. For example, you may want to send marketing letters to customers with a birthday in February, or send a list of specials to your business accounts. You can create custom categories that help you in your marketing efforts.

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

You assign the categories to your customers in the Marketing tab of the Customer Detail Information window (see Marketing Tab on page 7–12 for more information).

Figure 24-10: Marketing Screen

Accessing the Marketing Screen

TASK   **To access the Marketing screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Accounting** folder.
4   Double-click **Marketing**. The **Marketing** screen opens.

Adding Marketing Categories

TASK   **To add marketing categories in Mercury Administration:**

1   In **Mercury Administration**, access the **Marketing Categories** screen.
2   In the **Category** text box, enter the name of a category. Some examples of categories are account type, birthday month, mailing list, age group, etc. After entering a category in the text box, click **Add Category**.
3   With the category highlighted in the text box on the left, enter the first marketing type for that category under the word **Types** (on the right). For example, if the category is "account type," some related marketing types may be Business, Personal, Non-profit, School, and Other. Enter the first marketing type and then click **Add Type**. Then enter another marketing type for this category and click **Add Type** again, until all marketing types are added to the list.
4   Click **Apply** to save your changes before exiting this screen.

Removing Marketing Categories

TASK   **To remove an existing marketing category:**

1   In **Mercury Administration**, access the **Marketing** screen.
2   From the list of existing marketing categories, select the category you want to remove.
3   Click **Remove Category**.
4   Click **Apply** to save your changes before exiting this screen.

Removing Marketing Types

TASK   **To remove an existing marketing type:**

1   In **Mercury Administration**, access the **Marketing** screen.
2   From the list of existing marketing categories, select the category from which you want to remove the marketing type.
3   From the list of existing marketing types, select the type you want to remove.
4   Click **Remove Type**.
5   Click **Apply** to save your changes before exiting this screen.

StoreTransfer Screen

Store transfers allows you to share revenue between stores for local and incoming wire orders that are taken at one store but filled at another. In order for a clerk to transfer an order from one store to another, you must enable store transfers in Mercury Administration StoreTransfer screen. You also use the StoreTransfer screen to set the revenue split that the stores will receive when local and incoming wire orders are transferred.

Figure 24-11: StoreTransfer Screen

You can configure the following settings in the StoreTransfer screen:

Table 24-10: StoreTransfer Settings

Setting	Description
Allow Store Transfers	Select this option to allow one store to transfer orders to another store. When enabled, the Transfer To drop-down list in Order Entry and Point of Sale windows will be available for local and incoming wire orders.

Table 24-10: **StoreTransfer Settings (cont.)**

Setting	Description
Local Order Selling Commission	Enter the percentage of the merchant amount and delivery charge that the store that takes the order will retain for local orders. The percentage that the filling store will receive automatically appears in the Filling Percentage field.
Incoming Wire Orders	Enter the percentage of the merchant amount and delivery charge that the store that takes the order will retain for incoming wire orders. The percentage that the filling store will receive automatically appears in the Filling Percentage field.

Accessing the StoreTransfer Screen

TASK   **To access the StoreTransfer Screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Accounting** folder.
4   Double-click **StoreTransfers**. The **StoreTransfer** screen opens.

Enabling Store Transfers

TASK   **To enable store transfers in the StoreTransfer screen:**

1   In **Mercury Administration**, access the **StoreTransfer** screen.
2   Click **Allow Store Transfers**.
3   In the Selling Commission field for Local Order, enter the percentage of the merchant amount and delivery charge that the store taking the order will receive. The percentage that the filling store will receive automatically appears in the Filling Percentage field.
4   In the Selling Commission field for Incoming Wire Orders, enter the percentage of the merchant amount and delivery charge that the store taking the order will receive. The percentage that the filling store will receive automatically appears in the Filling Percentage field.
5   Click **Apply**.

IMPORTANT   Because you changed a StoreTransfer setting, you will need to perform an FTDShutdown and an FTDStartup.

Enabling Accounting for Store Transfers

The first time that Store Transfers is enabled, you will see a warning message reminding you to run the Chart of Accounts Wizard. Running the Chart of Accounts Wizard adds the necessary general ledger accounts for tracking and reporting store transfers in Mercury Accounting. If you do not use Mercury Accounting or do not run the Chart of Accounts Wizard, you can still perform store transfers, but no data on the transfers will appear in Balance Wizard reports.

NOTE   If your Mercury Accounting is set up with a single QuickBooks company file for all stores, you only need to perform this task once. If you have a separate QuickBooks company file for each store, you will need to perform this task for each store.

TASK   **To enable accounting for Store Transfers:**

Rerun the FTD Mercury Chart of Accounts Wizard to add general ledger accounts. In the Chart of Accounts Setup QuickBooks Chart of Accounts screen, select the following accounts. For more information, see Adding Accounts to the Chart of Accounts on page 20–25).

Communication Folder

The Communication folder contains seven options that allow you to configure the way that FTD Mercury communicates via the Internet, phone lines, and the Mercury Network. The following screens are accessible from this folder:

» Email Screen

» Fax Screen

» Internet Screen

» MailServer Screen

» Mercury Connection Screen

» Phone Lines Screen

» Remote Delivery Screen

Email Screen

If you want to email your customers delivery confirmations, statements, and/or invoices, the Email screen allows you to configure the way the email messages look and how/when they are sent.

Figure 24-12: Email Screen

You can configure the following settings in the Email screen:

Table 24-11: Email Settings

Setting	Description
Store Name	Displays the name of the store you are setting up.
Email Cover Letter	This list displays the name of the email cover letter you want to use for statements and invoices. When a customer receives a statement or invoice via email, the email cover letter is what displays as the content of the email message. The statement or invoice will be an attachment to the email message. If you email statements and/or invoices, select a template from this list. Templates that you created in the FTD Document Center with the type of E-mail Cover Letter are available for selection from this list. Selecting None sends your customers blank email messages with statements or invoices attached.
Local Delivery	Located in the Delivery Confirmations area of this screen, this list allows you to select the name of the default email template that you want to use for local delivery confirmations. This confirmation email message is sent to customers when a local delivery order has been marked Delivered. Select the name of the template from the list, or select None if you do not want to have a default template for local delivery. If None is selected, the clerk must manually select a template at Order Entry.
Outgoing Delivery	Located in the Delivery Confirmations area of the screen, this list allows you to select the name of the default email template that you want to use for outgoing Mercury orders. The confirmation email message is sent when the outgoing order is marked Delivered. Select the name of the template from list, or select None if you do not want to have a default template for outgoing orders. If None is selected, the clerk must manually select a template at Order Entry.
Outgoing Delivery with ANS Received	Located in the Delivery Confirmation area of this screen, this list allows you to select a different email template for orders that received an ANS confirmation message back from the filling florist confirming that the order has been delivered. You may want to select a different template stating that the filling florist has confirmed that the order was delivered. Select the name of the template from the list, or select None if you do not want to have a default template for outgoing orders with ANS messages received. **NOTE:** If a customer has already been sent a delivery confirmation message on an order and you receive a ANS message back on an order, the system does not send another delivery confirmation message to the customer. Only one delivery confirmation message is sent per order.
Design Picture	Located in the Picture Templates area of this screen, this list allows you to select the name of the default email template to use when you send a customer a picture of the product that you have designed for them. For example, you may want to have a template stating that you would like to share a picture of the product that was designed. Select the name of the template from the list, or select None if you do not want to have a default template for local orders with design pictures.

Table 24-11: Email Settings (cont.)

Setting	Description
Recipient Picture	Located in the Picture Templates area of this screen, this list allows you to select the name of the default email template to use when you send a customer a recipient picture. For example, you may want to select a template stating that the recipient would like to share the picture of them receiving their gift. Select the name of the template from the list, or select None if you do not want to have a default template for local orders with recipient pictures.
Outgoing Delivery with Picture Received	Located in the Picture Templates area of this screen, this list allows you to select a default email template for orders when you receive a message with a picture back from the filling florist. For example, you may want to select a template stating that you have received a picture from the florist that delivered the customer's gift. Select the name of the template from the list, or select None if you do not want to have a default template for outgoing order messages received with pictures.
Carbon Copy	The email address in this field receives a copy of each email message. Note that this address displays in the CC line of the email message that the customer receives.
BCC Address	The email address in this field also receives a copy of each email message. However this address does NOT display in the CC line of the email message that the customer receives (the email address is hidden).
Reply To	If the customer replies to the email message, the new message is sent to this address.
From Alias	You can type a common name in this field to disguise the actual email address from which the message is being sent. For example, you can type **Ken's Floral Gift Shop** in this field to disguise your store's email address in the From line.
Default Processing Option	This setting allows you to configure whether messages are sent immediately or in a batch at a later time. If you select Later, you must specify the later time in the Default Later Time field.
Default Later Time	If you selected Later as the Default Processing Option, this is the default time that the email messages will be sent.

Accessing the Email Screen

TASK   **To access the Email screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Communications** folder.
4   Double-click **Email**. The **Email** screen opens.

Configuring Email Settings

TASK   **To configure email settings for FTD Mercury:**

1   In **Mercury Administration**, access the **Email screen**.
2   In the **Store Name** field, select the store for which you are configuring settings.
3   In the **Templates** area, from the **Email Cover Letter** list, select the cover letter you want to use, or select **None** if you do not want to use an email cover letter.

4   In the **Delivery Confirmations** area, select the default templates to use with local delivery confirmations, outgoing delivery confirmations, and outgoing delivery confirmations with ANSwer messages received.

5   In the **Addressing** area, enter any additional email address information.

6   Set the value for the **Default Processing Option**. If you select later, set the **Default Later Time**.

7   Click **Apply** to save changes before you exit this screen.

Fax Screen

If you want to fax statements and/or invoices to your customers, this screen allows you to configure the way the faxes look and how/when they are sent.

Figure 24-13: **Fax Screen**

You can configure the following settings on this screen:

Table 24-12: **Fax Screen Settings**

Setting	Description
Store Name	Select the store which you are configuring from this list.
Fax Cover Letter	From this list, select the cover letter template that you want to use when faxing. You can either leave the default template selected, or select a different template from the list. If you do not want to use a cover letter, select None. To edit any of the fax cover letter templates, see Editing/Creating Fax Cover Letters on page 24–28.

Table 24-12: **Fax Screen Settings (cont.)**

Setting	Description
Default Processing Option	If you want to send faxes immediately, select Now in this field. If you want to send faxes in a batch at a scheduled time, select Later in this field. If you select Later, faxes are held until the time specified in the Default Later Time field.
Default Later Time	If you selected Later in the Default Processing Option field, this is the default time that the faxes will be sent.
Number of Retries	If the fax job fails, this is number of times it will try to resend.
Time Between Retry Attempts	This field lists the number of seconds to wait between retry attempts.

Accessing the Fax Screen

TASK   **To access the Email screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Communications** folder.
4   Double-click **Fax**. The **Fax** screen opens.

Configuring Fax Settings

TASK   **To configure fax settings for FTD Mercury:**

1   In **Mercury Administration**, access the **Fax** screen.
2   In the **Template** area, from the **Store Name** list, select the name of the store for which you are configuring settings.
3   From the **Fax Cover Letter** list, select the cover letter you want to use for faxes. If you want to omit the cover page, select **None**. If you want to edit an existing fax cover letter, select the letter and click **Edit**. See Editing/Creating Fax Cover Letters on page 24–28 for details.
4   In the **Processing** area, select the **Default Processing Option**. If you select **Later**, configure the **Default Later Time**.
5   In the **Number of Retries** field, set the number of times FTD Mercury will attempt to resend a fax.
6   In the **Time Between Retry Attempts**, enter the number of seconds FTD Mercury should wait before trying to send a fax again.
7   Click **Apply** to save changes before exiting the screen.

Editing/Creating Fax Cover Letters

If you want to change the appearance of a fax cover letter, a few steps must be taken. You must first make the changes to an existing template to make it appear the way you wish, save it under a different name, then you must open the FTD Document Center and save the change. Follow the instructions below.

1   In **Mercury Administration**, access the **Fax** screen.
2   In the **Fax Cover Letter** field, select the fax cover letter that you want to change, then click **Edit**. The cover letter opens in an editor window: Make changes to the cover letter as desired.

NOTE   Right-clicking on an item allows you to change font, alignment, line, fill, and color. The Insert menu allows you to insert a new merge field, such as the sender or recipient name.

3   When you are ready to save the new template, on the **File** menu, click **Save As**.

4   In the **File Name** field, type a new name for the cover letter and then click **Save**.

NOTE   The name of the cover letter must be less than 16 characters. If it is greater than 16 characters, then the cover letter will not be visible in Mercury Administration.

5   Next you must open the FTD Document Center and make a save to any existing template. This allows you to use the new fax cover letter in the FTD Mercury program.

   a.   Open the FTD Document Center by double-clicking the **FTD Document Center** icon on your desktop, or in FTD Mercury, on the **Tools** menu, click **Doc Center**.

   b.   Highlight an existing template (other than a sample template) and then click **OK**.

   c.   With the existing template on the screen, on the **Template** menu, click **Save**.

   d.   Click **OK**.

Internet Screen

This option allows you to set up Internet settings for any FTD Mercury service that uses the Internet, such as Wireless Delivery Confirmation and email.

IMPORTANT   It is strongly suggested to use this option only with the assistance of the Mercury Technology Assistance Center.

Figure 24-14: Internet Screen

The Internet screen has the following settings.

Table 24-13: Internet Screen Settings

Setting	Description
Internet Connection Type	Select your Internet connection type from the following options: » **Always Online**—This means that your system is always connected to the Internet and your computer does not have to "dial up" to connect. For example, you might have a LAN, cable, or DSL connection. If you select this option, the Permanent area is enabled. You must select Always Online to process credit cards over the Internet. If you are already configured (via the Credit Cards screen) to process credit cards in this manner, you cannot change your Internet connection type to Dial-Up or Dial Client. » **Dial-Up**—This means your system will dial an access number to connect to the Internet. When you select this option, the Dial-Up Networking area is enabled. » **Dial Client**—This means you are using third-party software (such as AOL) to connect to the Internet. When you select this option, the Dialing Client area is enabled.
Proxy Server Is Used	Select this box if you use a proxy server. If you are unsure, contact your network administrator.
Proxy Server	Enter your proxy server address. To obtain this information, contact your network administrator.
Proxy Port	Enter your proxy server port number. To obtain this information, contact your network administrator.
Proxy User ID	Enter your proxy server user ID. To obtain this information, contact your network administrator.
Proxy Password	Enter your proxy server password. To obtain this information, contact your network administrator.
Internet Service Provider	From this list, select the name of the Internet Service Provider (ISP) you are using. If your ISP is not available in this list, this means the ISP has not been set up in Windows.
Name	From this list, select your ISP name.
Authentication Delay	This value should be set to 60 seconds.

Accessing the Internet Screen

TASK **To access the Email screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Communications** folder.
4 Double-click **Internet**. The **Internet** screen opens.

MailServer Screen

If you send delivery confirmations or statements via email, you must set up your outgoing mail server using the Mail Server option in Mercury Administration. If you use FTD's mail server, this

section teaches you how to set up your system to connect to the mail server. If you do not use FTD's mail server, you have to contact your ISP for the information that is required on this screen.

If you use the Web Order Interface, you must also complete the incoming mail server section of the screen. The Web Order Interface is a feature that allows you to retrieve orders from your store's Web site via email and convert them to incoming orders in FTD Mercury. Therefore if you purchased the Web Order Interface, it is required to enter your incoming mail server information in this screen so that those orders can be retrieved. Your incoming mail server is the server that your ISP (Internet Service Provider) uses to manage your email account. If you have multiple email accounts to where Web site orders are sent, you can set up multiple incoming mail server accounts.

Figure 24-15: MailServer Screen

Outgoing Mail Server Setup Information

It is necessary to set up your outgoing mail server information so that you can send outgoing email messages from FTD Mercury, for example delivery confirmations, statements, and invoices. This information must also be configured if you use the Web Order Interface.

Table 24-14: Outgoing Mail Server Information

Setting	Description
Server Name	If you are using FTD's mail server, this field should display mail.mercurynetwork.com. If you are NOT using FTD's mail server, this is the name of your ISP's email server for OUTGOING email messages. (Your ISP's technical support department should provide you with this information. Ask the technical support department "What is the name of the Email server for OUTGOING email messages?").

Table 24-14: Outgoing Mail Server Information (cont.)

Setting	Description
Server Port	If you are using FTD's mail server, this field should display 587. If you are NOT using FTD's mail server, this is your ISP's mail server port number. (Your ISP's technical support department should provide you with this information. Ask the technical support department "What is the Mail Server Port Number?")
Authentication Required	This option should be checked if your outgoing mail server requires authentication. Some ISPs require authentication to connect to the mail server. If you are using FTD's mail server, this option should be checked.
	If you are NOT using FTD's mail server, your ISP's technical support department can tell you whether the outgoing mail server requires authentication. Ask the technical support department "Does the outgoing mail server require authentication? If so, what is the account name and password?"
Account Name	This field becomes active only if Authentication Required is checked.
	If you are using FTD's mail server, type your shop code (with the suffix) followed by @mercurynetwork.com (for example, 905034AY@mercurynetwork.com). The entry in this field in case sensitive, so if you are using FTD's mail server, make sure that the suffix of your shop code is in CAPITAL letters.
	If you are NOT using FTD's mail server, type the ISP's authentication login name in this field (obtain this information from the technical support department of your ISP).
Account Password	This field becomes active only if Authentication Required is checked.
	If you are using FTD's mail server, type cat7tell in this field (all lowercase letters).
	If you are NOT using FTD's mail server, type the ISP's authentication password in this field (obtain this information from the technical support department of your ISP).

Incoming Mail Server Setup Information

If you use the Web Order Interface, it is necessary to set up your incoming mail server information so that FTD Mercury can retrieve your Web site's orders from your email account. To obtain the information required in this section, you have to call your Internet service provider's technical support department. If you have multiple email accounts to where your Web site orders are sent, set up the information using a new row in the table for each account.

You can configure the following settings on this screen:

Table 24-15: Incoming Mail Server Information

Setting	Description
Server	Type your ISP's incoming mail server name. The format is usually three series of numbers or letters separated by periods.
Store	Select the name of the store that uses this email account to receive Web site orders. To select a store, click inside of the cell so that a down arrow appears, then click the arrow and select the store name.
Protocol	Type whether your ISP uses a POP3 or IMAP server protocol.
Port	Type your ISP's outgoing mail server port number.

Table 24-15: **Incoming Mail Server Information (cont.)**

Setting	Description
Account	Type the email account from where you will be retrieving the Web site orders (for example, if your email address is mystore@email.com, you would type mystore).
Password	Type the password that you use to access the email account. This password is case sensitive.
Subject	Type the email subject line that you use for the orders that are sent from your Web site to this email address. FTD Mercury only creates orders from email messages with this subject line. Therefore it is important that you type the subject line exactly as it appears in the order email messages.
Encryption	If the order email is encrypted (your Web site encrypts the email message when it is sent to your email account), select the encryption method that your Web site designer uses (to select an encryption type, click inside of the cell so that a down arrow appears, then click the arrow to select an encryption method). If your Web site does not use encryption, leave the default value to None.
Encrypt P/W	If you selected an encryption method in the Encryption column, type the encryption password that your Web site designer selected for your Web site. If you selected None in the Encryption column, leave this field blank.
Referral Code	Select the referral code that you want to use for your Web orders. If you have not already created a referral code for Web orders, it is highly recommended that you create one so that you can track sales generated by your Web site. See Referral Codes Screen on page 24–72 for details.
Send Errors To	If there are errors with an order, FTD Mercury email messages you the order indicating that there was an error. Type the email address where you want to receive these orders.
Polling Interval	The Polling Interval field displays how often your system connects to the Internet to receive orders from the email account. By default, your system checks for orders every 20 minutes. You can change this time to suit your needs, however keep in mind that if you have dial-up Internet access, each time the system dials out it is billed as a local telephone call.

NOTE   If you have dial-up Internet access, you might want to check your telephone billing plan to see what type of plan you have. Most telephone companies offer packages with local unlimited local calls. It is recommended to purchase a phone plan with unlimited local calls so that you can retrieve orders at least every 20 minutes, while keeping your phone bill low.

To save changes on this screen, click Apply. Clicking Undo reverts the settings on this screen back to when they were last saved.

Accessing the MailServer Screen

TASK   **To access the Email screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Communications** folder.
4   Double-click **MailServer**. The **MailServer** screen opens.

Mercury Connection Screen

If you are setting up your system to use the Internet to send and receive orders, the Mercury Connection screen allows you to enter your Internet account information.

IMPORTANT   It is strongly suggested to use this option only with the assistance of the Mercury Technology Assistance Center.

NOTE   In previous releases of FTD Mercury, this information could be found in the Account and Host tabs of the Connection Settings option.

Figure 24-16: Mercury Connection Screen

You can configure the following settings on this screen:

Table 24-16: **Mercury Connection Screen Settings**

Setting	Description
Communication Method	Select your connection method. There are two options available: » **Direct Dial Access**—Select this if you are using the Mercury Network to send and receive orders and messages. If this option is selected then all other options in this window are disabled. You do not have to set up any information on this screen if you are using the Mercury Network. » **Internet Access**—Select this if using the Internet to send and receive orders and messages (you must sign up for an Internet Access account with FTD). If this option is selected then all other options in this window become active. There are several setups that you have to enter so that FTD Mercury can properly send and receive orders and messages over the Internet. It is highly suggested to make changes in this section only with the assistance with the Mercury Technology Assistance Center.
Account ID	Enter the account ID number that was provided to you when you signed up for the Internet Access account with FTD.
Account User ID	Enter the Account User ID that was provided to you when you signed up for the Internet Access account with FTD.
Account Password	Enter the account password that was provided to you when you signed up for the Internet Access account with FTD. Asterisks (*****) will mask the password as you type.
Confirm Password	Enter your password again to confirm it.
Host Address	This is the address where your system sends and receives your orders and messages. This should be set to md2.mercurynetwork.com, unless otherwise specified by an FTD Mercury Support representative.
Host Port	Type 80 in this field, unless otherwise instructed by FTD Mercury Support.
Polling Interval	Enter how often your system will dial out to send and receive any waiting orders or messages.
Blackout Begin	Enter the time the blackout period starts.
Blackout End	Enter the time the blackout period is to end.
Current Time Zone	Your current time zone. If this is incorrect, click Change Time Zone to set the value to the correct time zone.
Current Time	Your current time. If this is incorrect, click Change Time to set your time.

Accessing the Mercury Connection Screen

TASK   **To access the Email screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Communications** folder.
4 Double-click **Mercury Connection**. The **Mercury Connection** screen opens.

Phone Lines Screen

The Phone Lines screen allows you to configure the PLLS (Phone Line Locking Server), which manages the phone lines that you use with FTD Mercury. Here you should indicate how you want to share your existing phone lines.

IMPORTANT   This option should only be used with the assistance of the Mercury Technology Assistance Center.

The Phone Lines option does not assign a function to a physical phone line, rather you are indicating here how you want them shared. For example, if you want Internet and fax to share a phone line, you would assign them to the same number phone line. You can assign them to any phone line (#1 or #2 for example). You are not telling the system which phone line to use, rather you are telling the system how you want to share it.

If you use broadband or DSL to connect to the Internet, then you should select None for Internet.

If you use MNAPI for the Mercury Network (you send Mercury orders and messages over the Internet), select None for Mercury.

If you share a phone line, (for example, between fax and credit card), the PLLS monitors the lines so that they "take turns." For example if you send a credit card and a fax at the same time, the credit card is transmitted first, then the PLLS frees the line so that the fax can be sent.

Figure 24-17: Phone Lines Screen

The Phone Lines screen contains the following settings:

Table 24-17: Phone Lines Settings

Setting	Description
Number of Phone Lines	Enter the number of phone lines you have available for FTD Mercury to use.
Internet Line	From this list, select a phone line you will use to connect to the Internet. This is the line that you use to send orders (if you use the Internet to send orders), as well as the line you use to browse the Web.
Fax Line	From this list, select a phone line to use for faxes.

Table 24-17: Phone Lines Settings (cont.)

Setting	Description
Mercury Line	From this list, select a phone line to use for the Mercury network.
Credit Card Line	In the first list, select CC Dial-up #1 for the first credit card line, then from the second list, select a phone line you want to use for that credit card connection. If you have additional credit card phone lines, select CC Dial-up #2 (and so on), assigning each a phone line number.
Suspend Internet Line Usage	Select this option to suspend the Internet phone line from use.
Suspend Fax Line Usage	Select this option to suspend the fax phone line from use.
Suspend Mercury Line Usage	Select this option to suspend the Mercury phone line from use.
Suspend CC Dial-up Line Usage	Select this option to suspend the selected credit card phone line from use.
Dial Prefix	If you have to press a number to reach an outside line (such as 9), enter the number in this field followed by a comma. The comma after the number forces the system to pause before dialing the number.

Accessing the Phone Lines Screen

TASK **To access the Email screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Communications** folder.
4 Double-click **Phone Lines**. The **Phone Lines** screen opens.

Remote Delivery Screen

The Remote Delivery option is used to set up the Wireless Delivery Confirmation module. For more information, see

Figure 24-18: Remote Delivery Screen

The Remote Delivery screen contains the following settings:

Table 24-18: Remote Delivery Screen Settings

Setting	Description
User ID	Enter your user ID for Wireless Delivery Confirmation. This is provided to you by the Mercury Technology Assistance Center.
Company ID	Enter your company ID for Wireless Delivery Confirmation. This is provided to you by the Mercury Technology Assistance Center.
Account Password	Enter your password for Wireless Delivery Confirmation. This is provided to you by the Mercury Technology Assistance Center.
Confirm Password	Enter your password again to confirm it.
Host Address	The address for the Gearworks wireless delivery Web site. This is provided to you by the Mercury Technology Assistance Center.
Host Port	Enter the host port for Wireless Delivery Confirmation. This is provided to you by the Mercury Technology Assistance Center.
Polling Interval	Specify the period of time in minutes in which your system will check for wireless delivery orders and download them to your phone.
Save GPS data for (days)	Enter the number of days to save GPS data.

Accessing the Remote Delivery Screen

TASK   **To access the Remote Delivery screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Communications** folder.
4 Double-click **Remote Delivery**. The **Remote Delivery** screen opens.

Delivery Folder

You can access the following screens from the Delivery folder:

» Delivery Code Screen

» Delivery Priority Code Screen

» Delivery Zone Screen

» Delivery Zone Fees Screen

» Address Verification Screen

Delivery Code Screen

To help you in the routing process, the Delivery Code screen allows you to create delivery codes so that you can track deliveries. Delivery codes flag an order as Delivered or Not Delivered. For example, you might set up delivery codes such as Delivered (Delivered), Left on Front Porch (Delivered), Not at Home (Not Delivered), Discharged from Hospital (Not Delivered), etc. You can mark orders Delivered or Not Delivered using these delivery codes in Ticket Search, Order Entry, Point of Sale, or in the Mercury Delivery application.

If you have the Wireless Delivery Confirmation add-on feature, your delivery drivers have these options listed on their phones so that they can mark orders Delivered/Not Delivered while they are on route. If you do not have the Wireless Delivery Confirmation add-on feature, your drivers should mark orders with these codes when they return from the delivery trip.

Figure 24-19: Delivery Code Screen

Delivery Code	Delivery Type
Delivered	Delivered
Left with neighbor	Delivered
Left at front door	Delivered
Not at home	Not Delivered
Not at work	Not Delivered
Discharged from hospital	Not Delivered
Bad address	Not Delivered
In ICU	Not Delivered
Damaged	Not Delivered
Office closed	Not Delivered
Refused	Not Delivered
Other	Not Delivered
	Not Delivered

Apply   Undo   Up / Down

Wireless Delivery Confirmation and Delivery Codes

If you have Wireless Delivery Confirmation, the delivery codes display on the wireless phone in the same order that they display on this window. Therefore you may want to move the codes up or down by highlighting a code, then clicking the Up or Down button.

You MUST at least set up the following five delivery codes if you have Wireless Delivery Confirmation. If you do not set up these exact delivery codes, Wireless Delivery Confirmation may not function:

» DELIVERED

» LEFT WITH NEIGHBOR

» LEFT AT FRONT DOOR

» IN ICU

» REFUSED

Accessing the Delivery Code Screen

TASK   **To access the Delivery Code screen in Mercury Administration:**

1 Launch **Mercury Administration**.

2 Double-click **Mercury Administration** in the explorer pane.

3 Double-click the **Delivery** folder.

4 Double-click **Delivery Code**. The **Delivery Code** screen opens.

Adding Delivery Codes

TASK   **To add a delivery code:**

1   In **Mercury Administration**, access the **Delivery Code** screen.

2   In the **Description** column, click inside of a blank cell and begin typing.

3   In the **Delivery Type** column, select if the delivery code is for orders that are **Delivered** or **Not Delivered**.

4   Click **Apply** to save changes before exiting this screen.

Delivery Priority Code Screen

The Delivery Priority Code option allows you to create your own custom delivery codes to use in Order Entry (for example "ASAP" or "BEFORE 1PM"). These codes are used to designate when an order should be delivered in Order Entry and Point of Sale.

Figure 24-20: Delivery Priority Code Screen

Code	Description	Print Field	Priority
RUSH	Rush	Rush Please	1
AM	Morning Delivery	AM Please	2
PM	Afternoon Delivery	PM Please	3
INST	Special Driver Instructions	Instructions	4

[Apply]   [Undo]

The Delivery Priority Code screen contains the following settings:

Table 24-19: Delivery Priority Code Screen Columns

Column	Description
Code	Delivery priority codes can be up to for characters in length and must be unique. Ensure that codes are easy to understand; your employees can select these codes in the Time Detail delivery field in Order Entry and Point of Sale.
	A recommended formatting scheme is A##A, A##P, B##A, and B#P. For example, A9A for After 9 A.M., A12P for After 12 P.M., B10A for Before 10 A.M., B5P for Before 5 P.M., and so on.

Table 24-19: Delivery Priority Code Screen Columns (cont.)

Column	Description
Description	Explain the delivery priority code. This text is for display purposes and does not print on the invoice.
Print Field	This is required if you want to select delivery priority codes in Order Entry and Point of Sale. The text that you enter here displays in the Time Detail list in Order Entry and Point of Sale and prints on the Order Entry invoice. If you do not type text in the Print Field column, the delivery code is not available to select in Order Entry and Point of Sale.
Priority	Assign each code a priority number between 1 and 9, number 1 being the highest priority, and 9 being the lowest priority. If you have the Standard or Advanced Mercury Delivery module, delivery priority codes display in the mapping and routing screens so that you can see the priority of the orders as you are creating delivery routes.

Accessing the Delivery Priority Code Screen

TASK **To access the Delivery Priority Code screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Delivery** folder.
4 Click **Delivery Priority Code**. The **Delivery Priority Code** screen opens.

Adding Delivery Priority Codes

TASK **To add a delivery priority code:**

1 In **Mercury Administration**, access the **Delivery Priority Code** screen.
2 Click in the **Code** column of a blank row and enter the new delivery priority code.
3 In the **Description** column, enter a description for the delivery priority code.
4 In the **Print Field** column, enter text that will display in the Time Detail list in Order Entry and Point of Sale.
5 In the **Priority** column, enter the priority for this code.
6 Click **Apply** to save your changes before exiting this screen.

Delivery Zone Screen

Delivery zones are used to help you route your deliveries and can be used to automate delivery charges in Order Entry and Point of Sale.

You can define multiple outgoing (wire out) delivery zones. This allows you to assign tax rates and customer charges based on the outgoing zone, which is particularly important if your taxing authority requires taxes be collected based on where goods are delivered.

Figure 24-21: Delivery Zone Screen

Zone Name	Delivery Type	ZIP Code	Active	Print Forms	Charge	Type	Tax Code
N/A	Carry Out	00000	☑	☐	$ 0.00	Postal Code	
Wire Out	Wire Out	00000	☑	☑	$ 0.00	Postal Code	
Pick Up	Pickup	00000	☑	☑	$ 0.00	Postal Code	
Local	Local	60515	☑	☑	$ 5.00	Postal Code	
Pool	Pool	00000	☑	☑	$ 0.00	Postal Code	
Test Addres	Local	00000	☑	☑	$ 5.00	Address	
Test Addres	Local	00000	☑	☑	$ 0.00	Address	
Zone1	Local		☑	☑	$ 6.95	Map	
Zone2	Local		☑	☑	$ 8.95	Address	
	Local	00000	☑	☑	$ 0.00	Postal Code	

[Pool Address] [Apply] [Undo] [Remove] [Remove All Tax Codes From Products]

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

» If you have the Mercury Delivery application, you can set up delivery zones in that program. Mercury Delivery allows you to set up delivery zones by postal codes, address, or by drawing a boundary on a map. See Delivery Zones on page 14–6.

» You can set up delivery zones using this option in Mercury Administration. This is the fastest and easiest way to set up delivery zones and delivery charges. By setting up delivery zones in Mercury Administration, you are assigning delivery zones to postal codes (when a recipient address with a particular postal code is entered in Order Entry or Point of Sale, the associated delivery charge is added to the order automatically). See the steps below to learn how to set up delivery zones this way.

IMPORTANT You cannot delete the N/A, Pickup, or the Wire Out delivery zones. You cannot change the name, delivery type, or zone types for the N/A or Wire Out delivery zones. Additionally, you cannot set the N/A zone as inactive.

For each delivery zone, you can configure the following settings:

Table 24-20: Delivery Zone Screen Settings

Setting	Description
Zone Name	Enter the name for the delivery zone. You cannot change the name of the N/A or Wire Out delivery zones.
	You change the zone name, delivery type, or zone type for the N/A or Wire Out zones.

Table 24-20: Delivery Zone Screen Settings (cont.)

Setting	Description
Delivery Type	Select the delivery type for this delivery zone. You can select from the following types: » Carry Out » Local » Pickup » Wire Out » Pool By default, when you create a new delivery zone, the delivery type is set to Local. You cannot change the delivery type if that delivery zone has been used in a sale. You also cannot change the zone name, delivery type, or zone type for the N/A or Wire Out zones. Only zones with a delivery type of Local are available in Mercury Delivery. Pickup sales are not available for routing in Mercury Delivery.
Zip Code	If this delivery zone is based on a specific ZIP code, enter the ZIP code here. This setting is optional.
Active	Select this check box if you want the delivery zone to display in Order Entry and Point of Sale. Inactive zones display in Mercury Delivery and Mercury Marketing, and are still included in reports. Inactive zones do not appear in Order Entry or Point of Sale. If a zone that was used for a previous order is marked as inactive, the order displays the store default delivery zone. You cannot make the store default zone inactive.
Print Invoice	Select this check box if you want to print an invoice when sending orders to this zone.
Charge	Enter the delivery charge for this zone. If you want to enter delivery charges manually in Order Entry or Point of Sale, or if you want to use the product detail screen and the Delivery Zone Fee screen in Mercury Administration to maintain delivery charges, leave this column blank.
Type	If you do not have the Mercury Delivery module, all delivery zones are saved as Postal Code types. If you have the Mercury Delivery module, this column may contain Address or Map as the type; you cannot change this value in Mercury Administration. You change the zone name, delivery type, or zone type for the N/A or Wire Out zones.

Setting	Description
Tax Code	If you want to assign a tax code to this delivery zone (this tax code overrides the store default tax code), select this tax code in the Tax Code column.
	Product tax codes and customer tax codes override delivery zone tax codes. Therefore the tax code that you associate with the delivery zone is applied only if there is no tax code on the product and the customer is not tax exempt.
	Tax Hierarchy
	FTD Mercury determines the correct tax to apply based on the following hierarchy:
	» **Customer—**If this is a tax-exempt customer, all products and fees for this customer are tax exempt as well. If not, FTD Mercury proceeds to the next level in the hierarchy.
	» **Product—**If this is not a tax-exempt customer, FTD Mercury determines if there is a tax code on the product or fee. If there is one, FTD Mercury uses this tax code. If not, FTD Mercury proceeds to the next level in the hierarchy.
	» **Delivery Zone—**If the customer is not tax exempt and there is no product tax code, FTD Mercury checks to see if a tax has been set for the delivery zone. If yes, FTD Mercury uses this tax code. Otherwise, it proceeds to the next level in the hierarchy.
	» **Store—**If the customer is not tax exempt, if there is no product tax code, and no delivery zone tax code, FTD Mercury applies the default store tax rate to the
	Because product tax codes override delivery zone tax codes, you must remove the tax codes from your products if you want to utilize delivery zone tax codes in Order Entry and Point of Sale. An easy way to remove tax codes from your product codes is to click the Remove All Tax Codes from Products button. Clicking this button removes all tax codes on your products.

There are two buttons at the bottom of the **Delivery Zone** screen that provide you access to extra functions in the **Delivery Zone** screen: the **Pool Address** button and the **Remove All Tax Codes From Products** button.

The **Pool Address** button opens the **Pool Address** window and allows you to enter the address where pool orders are to be delivered for the currently selected pool zone. You must enter a complete address, including street address, city, state/province, and postal code before you can save the pool address. No address verification is performed on the pool address you enter. You must enter a pool address for each pool zone you create.

NOTE   If you attempt to set a zone as a pool zone without specifying a pool address, you are prompted to enter the pool address if you click Apply.

The Remove All Tax Codes From Products button allows you to remove overriding tax codes from all products in your database.

Accessing the Delivery Zone Screen

TASK   **To access the Delivery Zone screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Delivery** folder.
4   Double-click **Delivery Zone**. The **Delivery Zone** screen opens.

Setting Up Delivery Zones in Mercury Administration

TASK   **To set up delivery zones using the Delivery Zones screen in Mercury Administration:**

1   In **Mercury Administration**, access the **Delivery Zone** screen.

2   In a blank row in the grid, click in the **Zone Name** column and type the name of the zone you want to add.

3   In the **Delivery Type** column, select the delivery type for the zone.

4   If the delivery zone is based on a specific ZIP code, enter it in the **Zip Code** column.

5   Ensure the **Active** check box is selected. This makes the delivery zone available in Order Entry and Point of Sale.

6   If you want to print an invoice when sending orders to this zone, select the **Print Invoice** check box.

7   In the **Charge** column, enter the delivery charge for this zone. If you want to enter delivery charges manually in Order Entry or Point of Sale, or if you want to use the product detail screen and the Delivery Zone Fee screen in Mercury Administration to maintain delivery charges, you can leave this column blank.

8   In the **Tax Code** column, you can optionally enter a tax code for this delivery zone. This tax code overrides the store default tax code. See Delivery Zone Screen on page 24–42 for details.

9   Click **Apply** to save the information before exiting this screen.

Creating Pickup Zones

TASK   **To create a zone for orders that will be picked up from your shop:**

1   In **Mercury Administration**, access the **Delivery Zone** screen.

2   In a blank row in the grid, click in the **Zone Name** column and type the name of the zone you want to add.

3   In the **Delivery Type** column, select Pickup.

4   Ensure both the **Active** check box and the **Print Invoice** check box are selected.

5   Ensure the **Tax Code** column is blank so your store's default tax code is applied.

6   Click **Apply** to save the information before exiting this screen.

Handling Existing Pickup Zones

If you had a zone you used for pickup orders prior to upgrading to FTD Mercury 7.1, you need to mark the existing zone as inactive and then create a new pickup zone with a different name (or use the one that should have been automatically created for you with a Pickup delivery type). Follow the instructions in Marking Delivery Zones as Inactive on page 24–46 and Creating Pickup Zones on page 24–46 to mark your existing zone as inactive and create a new pickup zone.

Marking Delivery Zones as Inactive

You can only mark delivery zones as inactive if there are no orders for the current date or future dates that use that zone, unless the order has been cancelled. You cannot mark the store default delivery zone or the N/A zone as inactive. Inactive zones do not appear in Order Entry or Point of Sale, but will still appear in Mercury Delivery, Mercury Marketing, and Mercury Administration. Inactive zones are included on any reports with sales for these zones.

TASK   **To mark a delivery zone as inactive:**

1   In **Mercury Administration**, access the **Delivery Zone** screen.

2   In the row containing the delivery zone you want to make inactive, clear the box in the **Active** column.

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

If you view previous or cancelled orders that used this delivery zone, order will display the store default zone instead.

Removing Existing Delivery Zones

You cannot remove delivery zones that are used by orders with a delivery date of today or a future date, unless the order has been cancelled. Additionally, you cannot remove a delivery zone that is used in a Standing Order Template. You cannot remove the N/A, Pickup, or Wire Out delivery zones, nor can you remove the store default delivery zone.

TASK   **To remove an existing delivery zone:**

1   In **Mercury Administration**, access the **Delivery Zone** screen.

2   Select the delivery zone you want to remove.

3   Click **Remove**.

4   Click **Apply** to save your changes before exiting this screen.

The delivery zone is removed from the grid and the FTD Mercury database. The zone will no longer be available in Point of Sale, Order Entry, or any other part of FTD Mercury.

Province Map Delivery Zones

NOTE   This applies only to Canadian systems which use the Mercury Delivery application.

FTD recommends that you use the provincial map zone utility to create a wire out map zone for each province if you are a Mercury Delivery user. With that in mind, FTD Mercury includes a utility that will create province map zones automatically. This utility creates a new wire out zone for each province within Canada. By default, these zones have no overriding tax codes on delivery charges. You can then create local zones within the province zones for local deliveries.

TASK   **To use the provincial map zone utility to create province map zones:**

1   Close Mercury Administration and FTD Mercury.

2   Click the **Windows Start** menu, point to **All Programs**, point to **Accessories**, and click **Windows Explorer**.

3   Navigate to the `C:\Wings\Support\Utilities` directory and double-click `CreateCanadianMapZones.exe`.

4   At the prompt asking if you want to create the zones, click **Yes**.

5   When the utility finishes creating the map zones, click **OK**.

After using this utility, be sure to assign the correct tax to each provincial zone created.

For more details, see Canadian Configurations on page C–1, and specifically Create Provincial Delivery Zones for Outgoing Orders on page C–10.

Pool Delivery Zones

Delivery pools, common in larger metropolitan areas, allow multiple flower shops within a community to share delivery resources. High-volume florists often participate in delivery pools so they can expand their delivery area. Billing for delivery pools is typically handled by tracking orders on a form called a pool ticket.

FTD Mercury allows you to designate pool delivery zones, including specifying the address. When an order invoice is printed, it clearly states it is for a POOL delivery zone type. If you use Mercury Delivery, when you print the route manifest, the address for the delivery pool is used to route the orders.

NOTE   Contact FTD Technology Sales either at 1-800-767-3222 or by emailing TechSales@FTDi.com if you want to explore having customized pool tickets created for FTD Mercury.

Configuring Pool Zones

You configure pool zones from the **Delivery Zone** screen in FTD Mercury or from **Mercury Delivery**. If you have **Mercury Delivery**, you should perform your configurations there. When you set a zone as a pool zone, you need to provide the pool address. This will be used as the address when routing orders for the pool.

Creating a Pool Zone in Mercury Administration

TASK   **To create a pool delivery zone in Mercury Administration:**

1   In **Mercury Administration**, access the **Delivery Zone** screen.
2   If you have not done so already, create a zone for a delivery pool, and set the **Delivery Type** as **Pool**.
3   With the delivery zone selected, click **Pool Address**. The **Pool Address** window opens.
4   Enter the address where pool orders are to be delivered for this zone. You must enter a complete address, including street address, city, state/province, and postal code before you can save the pool address. No address verification is performed on the pool address you enter.
5   Click **Save**.
6   Click **Apply** to save the delivery zone changes.

Configuring a Pool Zone in Mercury Delivery

TASK   **To create a pool zone in Mercury Delivery:**

1   On the **FTD Mercury Main Menu**, click **Delivery**. The **Delivery Snapshot** window opens.
2   Click **Zones**. The **Create Zone** window opens.
3   Click **Create Zone**.
4   Enter the information about the zone, setting the **Delivery Type** to **Pool**.
5   Click the **Pool Address** tab and enter the pool address.
6   Click **Save**.

Pool Address Window

You can access the **Pool Address** window by clicking **Pool Address** in the **Delivery Zone** screen in **Mercury Administration**. This window allows you to enter an address for a delivery pool (where pool orders are to be delivered for the selected zone).

You must enter a complete address, including street address, city, state/province, and postal code before you can save the pool address. No address verification is performed on the pool address you enter.

When you have finished entering the address for the pool, click **Save**.

Delivery Zone Fees Screen

The Delivery Zone Fees screen allows you to assess additionall fees when you select delivery zones in Order Entry or Point of Sale. Fees are added to the system as a product with a "fee" category. For example, when you select a wire out zone, you may automatically want to assess a relay and/or retrans fee. For the Delivery Charge column, this screen does not apply if you use the Mercury Delivery module or if you assign delivery fees to your delivery zones in the Delivery Zone option in Mercury Administration (see).

Before using this screen, you must do the following:

» Create names for your delivery zones using the Delivery Zones screen in Mercury Administration. See Delivery Zone Screen on page 24–42.

» Create product codes that may be applied as delivery zone fees. See Product Codes on page 8–1.

Figure 24-22: Delivery Zone Fees Screen

	Relay Fee	Retrans Fee	Delivery Charge
N/A	☐	☐	☐
Wire Out	☐	☐	☐
Pick Up	☐	☐	☐
Local	☐	☐	☐
Pool	☐	☐	☐
Test Address Zone	☐	☐	☑
Test Address2	☐	☐	☑
Zone1	☐	☐	☑
Zone2	☐	☐	☑

[Apply]   [Undo]

Accessing the Delivery Zone Fees Screen

TASK   **To access the Delivery Zone Fees screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Delivery** folder.
4 Double-click **Delivery Zone Fees**. The **Delivery Zone Fees** screen opens.

Assigning Fees to Delivery Zones

TASK   **To assign a fee to a delivery zone:**

1 In **Mercury Administration**, access the **Delivery Zone Fees** screen.
2 Select the correct check box category or categories for which you want to assign a delivery fee.
3 Click **Apply** to save the information before exiting this screen.

Removing Fees from Delivery Zones

TASK   **To remove a fee from a delivery zone:**

1 In **Mercury Administration**, access the **Delivery Zone Fees** screen.
2 Clear the check box next to the category or categories for which you want to remove the fee.

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

Address Verification Screen

Address verification is available only to customers with the Advanced Mercury Delivery module. The Address Verification screen holds the location of your address verification data and your password information. This information is updated for you automatically when your system is licensed for the Advanced Mercury Delivery module. Please do not change any of the information in this screen unless you are instructed to do so by the Mercury Technology Assistance Center.

Figure 24-23: Address Verification Screen

Accessing the Address Verification Screen

TASK **To access the Address Verification screen in Mercury Administration:**

1 Launch **Mercury Administration**.

2 Double-click **Mercury Administration** in the explorer pane.

3 Double-click the **Delivery** folder.

4 Double-click **Address Verification**. The **Address Verification** screen opens.

The Database Path field displays the location on your computer where the address verification data is stored. The License Password and Confirm Password fields contain your address verification account password.

Employee Folder

You can access the following screens from the Employee folder:

» Employees Screen

» Employee Type Screen

» Job Functions Screen

Employees Screen

The Employees screen allows you to add new employee information, change information, or delete employees from your system. You may also reactivate terminated employees from this window. For more information on these tasks, see Managing Employees on page 6–1.

NOTE Employees have equal rights in all stores. When you set up an employee in Mercury Administration, that employee's security settings apply at all locations.

Figure 24-24: Employees Screen

Employee Details

Although you can access the list of all employees in the system, as well as create a new employee from the Employees screen, information about individual employees is entered through Employee Details, which are displayed when you double-click an employee in the Employees screen.

Table 24-21: Employee Detail Settings

Setting	Description
Name	Enter the employee name. You can use any format you want, but a best practice is to be consistent.
	The way the name is entered is the way it displays as the operator on Mercury messages.
Employee ID	Enter the employee ID for this employee. This can be any format, but again, you should attempt to be consistent.
Address Type	Select an address type and enter the address in the address field. You can have more than one address on record (Home, School, etc.).
Address	Enter the address for the selected address type. If you did not format the address correctly, the Address Check window appears to confirm the employee's address.
	Addresses should be entered in the following format:
	123 Main Street Apt. 560 Downers Grove, IL 60515
Primary Address	Select the address type that you want to make the main contact address and select this check box. This way, you know what the primary address is for an employee with multiple addresses.

Table 24-21: **Employee Detail Settings (cont.)**

Setting	Description
Phone Type	Select a phone type and enter the phone number in the phone number field. You can have more than one phone number on record (home, cell, etc.).
Phone Number	Enter the phone number for the selected phone type.
Primary Phone	Select the phone type that you want to make the main number at which this employee can be contacted and select this check box.
Active Status	Select this check box if the employee is currently working in your store. You may want to activate and deactivate this for your seasonal employees. Employees who are not active cannot log in to FTD Mercury and do not appear in Get All Employee searches.
Social Security No.	Enter the employee's Social Security number in this field (with or without the dashes). This is not a required field.
Employee Type	Click the arrow and select the employee type from the list.
Job Category	Click the arrow and select the job category from the list.
Allow this Employee Online	If the employee has permission to log in to FTD Mercury, select this option.
Login Name	Enter a login name for the employee to use. This is the name the employee uses to log in to FTD Mercury.
Language	Click the arrow to select the language the employee speaks. When the employee logs in, the program displays in that language.
Password	Enter the password for the employee. The password will be protected by asterisks (*****).
Confirm	Confirm the employee's password. The password will be protected by asterisks (*****).
Notes	Enter any notes for this employee (such as hours the employee is available to work).

Accessing the Employees Screen

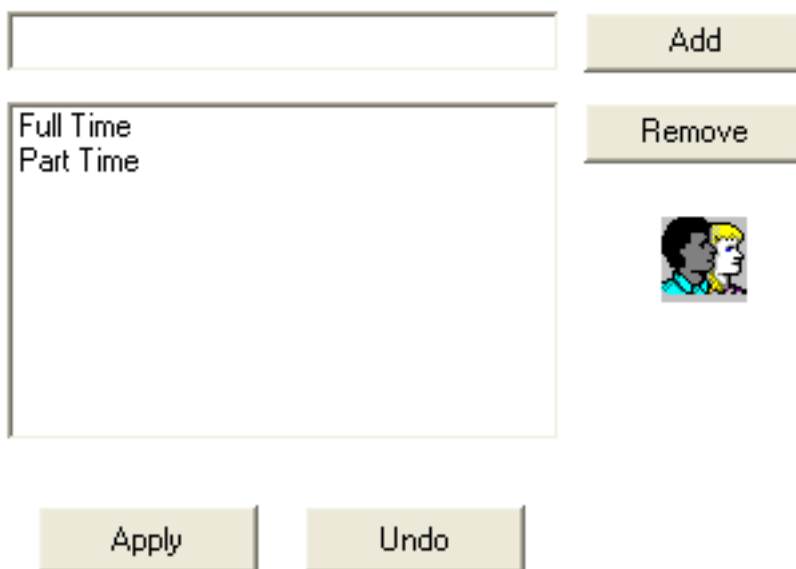**TASK**   **To access the Employees screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Employee** folder.
4 Double-click **Employees**. The **Employees** screen opens.
5 Double-click on an employee to view specific information about that employee.

Employee Type Screen

Employee types are used when entering a new employee to FTD Mercury. By default, FTD Mercury includes two employee types: Full Time and Part Time.

To learn how to add new employee types, see Adding Employees on page 6–1.

Accessing the Employee Type Screen

TASK   **To access the Employee Type screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Employee** folder.
4   Double-click **Employee Type**. The **Employee Type** screen opens.

Job Functions Screen

Job functions are used to determine the level of access your employees have in the system. For example, you may want your "Manager" employee job function to access all levels of the program, but you want your "Clerk" to access only the Order Entry and search functions. See Adding Job Functions on page 6–6 for details on adding job functions. (To learn how to change employee access level, refer to Window Access Screen on page 24–56 after adding any job functions.)

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

Figure 24-26: Job Functions Screen

Accessing the Job Functions Screen

TASK   **To access the Job Functions screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Employee** folder.
4   Double-click **Job Functions**. The **Job Functions** screen opens.

Security Folder

You can access the following screens from the Security folder:

»   License Screen
»   Window Access Screen

License Screen

The License screen displays the modules that currently are installed on your system and allows you to add modules as you purchase them. Use this option with the Mercury Technology Assistance Center to enter key codes to make the modules active on your system. If you purchase additional software for FTD Mercury, in most cases FTD can send you a GEN message and update the information in this screen for you automatically.

The More Information button gives you additional information on any of the modules listed. To get a brief description of a module, highlight that module in the list and then click the More Information button.

If you have a question regarding FTD Mercury licensing or want to purchase a new license for your system, call the Mercury Technology Assistance Center at 1-888-309-2244.

Figure 24-27: License Screen

To obtain license keys, please call support at 1-888-309-2244.

Module Name	Option Value	Validity
User License	10	Valid
Direct	1	Valid
SBE	1	Valid
Billing	1	Valid
Credit Card	1	Valid
Debit Card	0	Deactivated
Order Entry	1	Valid
POS	1	Valid
TEL Dir	0	Deactivated
Wireless Delivery Confirma	0	Deactivated
Address Verification	1	Valid
Standard Delivery	1	Valid
Advanced Delivery	0	Deactivated
GPS	0	Deactivated
Marketing	1	Valid
Web Orders	0	Deactivated
Accounting	1	Valid
Pool Ticket	1	Valid
FTD Dir	1	Valid

Add...   More Information

Accessing the License Screen

TASK   **To access the License screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Security** folder.
4 Double-click **License**. The **License** screen opens.

Adding Licenses

TASK   **To add a license:**

1 In Mercury Administration, access the **License** screen.
2 Click **Add** to open the **Add License** window.
3 Your store name is listed by default in the **Shop Code** list. If you have multiple stores, click the arrow to select the name of the store for which you want to add licensing information.
4 In the **Module** list, click the arrow and choose the name of the module you wish to add.
5 Enter the **Key** and **Value** information, supplied to you from FTD, in their appropriate fields.

6 Click **Save** in the **Add License** window.

Window Access Screen

Initially, your system is set to grant full access to all windows for all employees. However, you may wish to limit the level of access per job function. For example, you may prefer that your clerks not have access to employees' personal information. To learn how to restrict access, see Setting Window Access for Employees on page 6–8. When employees try to access a window they are not permitted to, they receive a message stating `You are not authorized to use this function`.

IMPORTANT This window restricts access according to employee job function so you can, for example, give your manager and your designer different levels of access. To ensure this feature can function, you must assign your employees job functions in the Employee window.

Figure 24-28: Window Access Screen

	Clerk	Owner	
Florist Search	Full access	Full access	Full
Status	Full access	Full access	Full
Mercury Order Message	Full access	Full access	Full
Mercury Message	Full access	Full access	Full
Terminate Employee	Full access	Full access	Full
Related Message	Full access	Full access	Full
FTD Directory	Full access	Full access	Full
REC Message List	Full access	Full access	Full
VNS Directory	Full access	Full access	Full
Auto Reconciliation History	Full access	Full access	Full
Cancel or Void Order	Full access	No access	No :
Retrieval Message (RET)	Full access	Full access	Full
Credit Card Message (CRD)	Full access	Full access	Full
Adjustment Message (ADJ)	Full access	Full access	Full
Credit Card Authorization	Full access	Full access	Full
Credit Card Settlement	Full access	Full access	Full
Unsettled Credit Card Authorizations	Full access	Full access	Full
View Settlement Totals	Full access	Full access	Full

[Apply] [Undo]

Accessing the Window Access Screen

TASK **To access the Window Access screen in Mercury Administration:**

1 Launch **Mercury Administration**.

2 Double-click **Mercury Administration** in the explorer pane.

3 Double-click the **Security** folder.

4 Double-click **Window Access**. The **Window Access** screen opens.

Store Folder

You can access the following screens from the Store folder:

» General Screen

» Wire Code Screen

» Store Settings Screen

General Screen

The General screen allows you to configure the country for the system, specify reciprocity handling, designate if you are a multi-store, specify your main wire service code, and specify the number of months to hold data before purging it.

Figure 24-29: General Screen

Each of these settings are explained below:

Table 24-22: General Screen Settings

Setting	Description
Country	Select whether this system is a U.S. or Canadian system. This setting should already be correct; during installation, this value was set. All stores on the system must be defined as the same country.
	IMPORTANT: If you change this value, you will receive a warning that changing the country will reconfigure your system and apply country-specific accounting and taxation rules. You will then need to close all FTD Mercury applications (including Mercury Administration) and restart them before continuing.
How should reciprocity be handled?	Select the way you want FTD Mercury to handle reciprocity. You can select from the following options: » By $ amount—Reciprocity will be based on dollar amount. » By count—Reciprocity will be based on order count.
Are you registered with Mercury as a multi-store?	If you are registered as a multi-store, click Yes. Otherwise, click No.
Main Wire Code	From the list of available wire codes, select your main FTD shop code.
Default Outgoing Message Processing	Select whether you want, by default, outgoing messages to be set to disallow auto forwarding. It is a best practice to allow auto forwarding.
Automatic Data Purge	Select the number of months that FTD Mercury will retain data before it is automatically purged. The default number of months is 255 (21 years, 3 months). You can set this value to a number between 3 and 255. Either highlight the existing number and replace it with a new number, or click the up or down arrows next to the number to change the value. The automatic data purge takes place on the first Sunday of the month at 4 A.M. The following are deleted: » Statements » Wire service reconciliation batches » POS sessions and the transactions within the sessions » Mercury Messages (Pending messages are not deleted) » Sales (only completed or cancelled sales) » Credit card transactions » Credit card settlements » GL export batches Recipient information and reciprocity totals are not deleted.

Accessing the General Screen

TASK **To access the General screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Store** folder.
4 Double-click **General**. The **General** screen opens.

Configuring General Settings

TASK   **To configure general settings:**

   1   In **Mercury Administration**, access the **General** screen.

   2   Change settings as necessary. See General Screen on page 24–57 for details on these settings.

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

Wire Code Screen

The Wire Code option allows you to add or remove wire codes for stores configured in your system.

Figure 24-30: Wire Code Screen

Accessing the Wire Code Screen

TASK   **To access the Wire Code screen in Mercury Administration:**

   1   Launch **Mercury Administration**.

   2   Double-click **Mercury Administration** in the explorer pane.

   3   Double-click the **Store** folder.

   4   Double-click **Wire Code**. The **Wire Code** screen opens.

Adding Wire Codes

TASK   **To add a wire code:**

1   In **Mercury Administration**, access the **Wire Code** screen.
2   From the **Store Name** list, select the name of the store to which you want to add the wire service code.
3   For each wire service tab, the default code displays. Click **Add Code**, enter the new code, and click **Save**.
4   Click **Apply** to save the information before exiting this screen.

Removing Wire Codes

TASK   **To remove a wire code:**

1   In **Mercury Administration**, access the **Wire Code** screen.
2   From the **Store Name** list, select the name of the store from which you want to remove the wire service code.
3   For each wire service tab, the default code displays. To remove a code, select it from the **Wire Codes** text box and click **Remove Code**.

NOTE   A default shop code cannot be removed. If the default shop code must be removed, add a new code and set it as the default code, then remove the old default code.

4   Click **Apply** to save the information before exiting this screen.

Setting Your Default Shop Code

TASK   **To set your default shop code:**

1   In **Mercury Administration**, access the **Wire Code** screen.
2   In the **Store Name** list, select the store for which you are setting the default shop code.
3   Select the tab with the name of the wire service for which you are setting the default shop code.
4   Select the correct default code in the lower text box and click **Set Default**.
5   Repeat for the remaining wire service tabs.
6   Click **Apply** to save the information before exiting this screen.

Store Settings Screen

The Store Settings screen allows you to set default tax codes, delivery zones and card fonts for your stores.

Figure 24-31: Store Settings Screen

This screen includes the following settings:

Table 24-23: Store Settings Screen Settings

Setting	Description
Store	The name of the store for which these settings apply.
Address	Contains the address of the selected store.
Province	This list, available only when you are configured as a Canadian shop, sets the taxation method for the store. Depending on the province where the store is located, where the order originated from, and where the order is to be delivered, different tax rates will be applied.
Default Tax Code	Select the tax code you want to use as the default in Order Entry and Point of Sale. This should be the tax code you will charge the majority of your customers, and usually corresponds to your state or provincial tax.

Table 24-23: Store Settings Screen Settings (cont.)

Setting	Description
Default Delivery	Select the delivery zone you use most often, which will be used as the default delivery zone for orders. This is optional; you can set this to blank.
GST ID#	This field, available only when you are configured as a Canadian shop, allows you to input your GST ID number. When this field is populated, FTD Mercury prints this number on Point of Sale receipts, Order Entry invoices, and customer statements, directly below your store address. **NOTE:** You can use only letters, numbers, spaces, hyphens, and ampersands (&) in this field, and are limited to 30 characters.
US Exchange Rate	This field, available only when you are configured as a Canadian shop, is used to calculate the conversion of U.S. funds to Canadian funds on non-wire transactions in Order Entry and Point of Sale. By default, the exchange rate for FTD is 1.200000, meaning for every $1.00US, funds are converted to $1.20CDN. This local exchange rate is used in Point of Sale when tendering sales and receiving payment in U.S. dollars, and in the Money Counter for entering cheques/other currency if in U.S. dollars.
Guarantee	This field displays the guarantee message that prints at the bottom of the Order Entry invoice. You can erase the existing text and type your own text here. If you need to reset the text, click Restore Default Guarantee.

Accessing the Store Settings Screen

TASK   **To access the Store Settings screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Store** folder.
4   Double-click **Store Settings**. The **Store Settings** screen opens.

Changing the Store Name

TASK   **To edit store information (such as the store name, default tax code, or default delivery zone):**

1   In **Mercury Administration**, access the **Store Settings** screen.
2   In the **Store** area, select the store you want to change the name for and click **Edit**.
3   Enter the new name for the store.
4   Click **Save**.
5   Click **Apply** to save the information before exiting this screen.

Changing the Store Address

TASK   **To change the store address:**

1   In **Mercury Administration**, access the **Store Settings** screen.
2   In the address box, change the address.
3   If you are a Canadian shop, from the **Province** list, ensure the province is correct.
4   Click **Apply** to save your changes before exiting this screen.

Adding Stores

If you are configured as a multi-store shop in FTD Mercury, you can add new stores from the Store Settings screen.

TASK   **To add a store:**

1   In **Mercury Administration**, access the **Store Settings** screen.
2   In the **Store** area, click **Add**. The **Add Store** window opens.
3   In the **Store Name** field, type the store name exactly as you want it to appear on statements. This field is limited to 50 characters. Click **Save**.
4   In the store address box, enter your store address.
5   If you are a Canadian shop, from the **Province** list, select the province where this store is located.
6   From the **Default Tax Code** list, select the default tax code for the store.
7   From the **Default Delivery** list, select the default delivery zone for the store (if desired; otherwise, select **N/A**).
8   If you are a Canadian shop:

   a.   In the **GST ID#** field, enter your GST ID number.
   b.   In the **US Exchange Rate** field, enter the exchange rate for U.S. dollars to Canadian dollars. This is used for local currency exchanges and not for wire orders.

9   Click **Save**.
10 Click **Apply** to save the information before exiting this screen.

Setting the Default Tax Code

TASK   **To set your store's default tax code in Mercury Administration:**

1   In **Mercury Administration**, access the **Store Settings** screen.
2   From the **Default Tax Code** list, select the tax code you want to use as the default.
3   Click **Apply** to save changes before exiting this screen.

Setting the Default Delivery Zone

TASK   **To set your default delivery zone in Mercury Administration:**

1   In **Mercury Administration**, access the **Store Settings** screen.
2   From the **Default Delivery** list, select the delivery zone you expect to use most often. If you do not want to have a default delivery zone, select **N/A**.
3   Click **Apply** to save changes before exiting this screen.

Setting the GST ID Number

IMPORTANT   This procedure applies only to Canadian stores.

TASK   **To set the GST ID number used by FTD Mercury:**

1   In **Mercury Administration**, access the **Store Settings** screen.
2   In the **GST ID#** field, enter the new GST ID number.
3   Click **Apply** to save changes before exiting this screen.

Changing the U.S. Exchange Rate

IMPORTANT   This only applies to Canadian stores.

TASK   **To change the U.S. exchange rate:**

1   In **Mercury Administration**, access the **Store Settings** screen.
2   In the **Store** area, select the store for which you are modifying the exchange rate.
3   In the **US Exchange Rate** field, enter the exchange rate you want to use.
4   Click **Apply** to save changes before exiting this screen.

Changing the Default Card Font

TASK   **To change the default card font and/or font size in Mercury Administration:**

1   In **Mercury Administration**, access the **Store Settings** screen.
2   Click **Change Card Font**. The **Font** window opens.
3   From the **Font** list, select the font you want to use as the default.
4   From the **Size** list, select the font size you want to use as the default.

IMPORTANT   Although the Marlett, Webdings, and Wingdings fonts appear in your font list, they are not valid fonts in FTD Mercury. FTD Mercury only recognizes changes that you make to the font and size (you cannot change fonts to be italic or bold for example).

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5   Click **OK**.
6   Click **Apply** to save your changes before exiting this screen.

System Folder

You can access the following screens from the System folder:

» Abbreviation Codes Screen
» Address Types Screen
» Reason Code Screen
» Product Category Screen
» Referral Codes Screen
» Phone Types Screen
» Paid Out/In Types Screen
» Advanced Settings Screen

Abbreviation Codes Screen

Abbreviation codes (sometimes referenda to as send to codes) are shortcuts for entering information into recipient card messages or addresses in orders.

Figure 24-32: Abbreviation Codes Screen

For example, you may want to use a code that, when entered into the recipient card message, automatically enters **Happy Birthday!** You could create an abbreviation code called hb for this message. Instead of typing **Happy Birthday!**, you would only need to enter \hb and FTD Mercury would automatically replace \hb with **Happy Birthday!** Additionally, you can enter address information into an abbreviation code that will automatically fill in the recipient address (such as for a hospital, funeral home, or other common delivery location).

The Abbreviation Codes screen consists of the following fields:

Table 24-24: Abbreviation Code Screen Fields

Field	Description
Code	The 1 to 5 character code. When you enter the code preceded by a backslash, the value will be filled into the appropriate fields in Order Entry or Point of Sale.
Company	The company name for the recipient.
Address	The street address for the recipient.
City	The recipient's city.
State	The recipient's state.
ZIP Code	The recipient's ZIP/postal code.
Phone	The recipient's phone number.
Card Message	The card message to insert when you use this abbreviation code. You can enter up to 200 characters (including spaces and returns).
Occasion	The occasion associated with this abbreviation code. When you use this code in Order Entry or Point of Sale, the Occasion drop-down list will automatically be selected using this value.

If you associate values for both the recipient address and card message with an abbreviation code, if you enter the abbreviation code in any of the recipient address fields in Order Entry or Point of Sale, both the address and card message will be populated. If there is only a card message, you can only use the code in the Card Message field; likewise, if there is only an address, you can only enter it in a recipient address field.

Predefined Abbreviation Codes

The following abbreviation codes (all for card messages) are already set up for you in your system:

Table 24-25: Predefined Abbreviation Codes

Abbreviation Code	What It Represents
GWS	Get Well Soon
HA	Happy Anniversary
HB	Happy Birthday
HE	Happy Easter
HFD	Happy Father's Day
HH	Happy Holidays
HMD	Happy Mother's Day
HSW	Happy Secretary's Week
HT	Happy Thanksgiving
HVD	Happy Valentine's Day
ILM	In Loving Memory
ILY	I Love You
JB	Just Because
L	Love
MC	Merry Christmas
TOY	Thinking of You
WDS	With Deepest Sympathy
WL	With Love
WLS	With Love and Sympathy
WLY	We Love You
WML	With All My Love
WOS	With Our Sympathy

Using Abbreviation Codes

You can use abbreviation codes to automatically enter recipient or card message information in Order Entry or Point of Sale. When entering an abbreviation code for a card message, enter \code, (where code is replaced by the abbreviation code) in the Card Message field. FTD Mercury automatically enters the card message in the field as defined in Mercury Administration. If the abbreviation code is for a recipient address, enter \code in any of the Recipient Address fields and the information from Mercury Administration will automatically be filled in. If your code has a card message and a recipient address, you can use the code in the Recipient Address fields and the card message will automatically be filled in as well. If you have specified an Occasion for the abbreviation code, the Occasion will automatically be selected once you enter the abbreviation code.

NOTE   For card messages, FTD Mercury will automatically adjust the formatting of the abbreviation code text if the font and/or font size necessitate it.

TIP   If text exists in the **Card Message** field or the **Recipient Address** field and you use an abbreviation code, the value of the abbreviation code is inserted after the existing text. You can use more than one abbreviation code in the **Card Message** field.

Accessing the Abbreviation Codes Screen

TASK   **To access the Abbreviation Codes screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **System** folder.
4   Double-click **Abbreviation Codes**. The **Abbreviation Codes** screen opens.

Adding Abbreviation Codes

Adding an Abbreviation Code for a Card Message

TASK   **To add an abbreviation code for a card message:**

1   In **Mercury Administration**, access the **Abbreviation Codes** screen.
2   In the **Code** field, enter in the new code.
3   In the **Card Message** field, enter the text you want to replace the code when you use the code.
4   If desired, from the **Occasion** list, select the occasion to associate with this abbreviation code.
5   Click **Add**.
6   Click **Apply** to save the changes before exiting this screen.

Adding an Abbreviation Code for a Recipient Address

TASK   **To add an abbreviation code to use for a recipient address:**

1   In **Mercury Administration**, access the **Abbreviation Codes** screen.
2   In the **Code** field, enter in the new code.
3   If there is a company you want to associate with the code, enter it in the **Company** field.
4   In the **Address** field, enter the street address for the code.
5   In the **City** field, enter the city.
6   From the **State** list, select the state.
7   In the **ZIP Code** field, enter the ZIP/postal code.
8   If there is a phone number for the abbreviation code, enter it in the **Phone** field.
9   If desired, from the **Occasion** list, select the occasion to associate with this abbreviation code.
10 Click **Add**.
11 Click **Apply** to save the changes before exiting this screen.

Adding an Abbreviation Code for Both an Address and Card Message

TASK   **To add an abbreviation code to insert both a recipient address and a card message:**

1   In **Mercury Administration**, access the **Abbreviation Codes** screen.
2   In the **Code** field, enter in the new code.
3   If there is a company you want to associate with the code, enter it in the **Company** field.
4   In the **Address** field, enter the street address for the code.
5   In the **City** field, enter the city.
6   From the **State** list, select the state.
7   In the **ZIP Code** field, enter the ZIP/postal code.

8   If there is a phone number for the abbreviation code, enter it in the **Phone** field.

9   In the **Card Message** field, enter the text you want to replace the code when you use the code.

10 If desired, from the **Occasion** list, select the occasion to associate with this abbreviation code.

11 Click **Add**.

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

Modifying Existing Abbreviation Codes

TASK   **To edit an existing abbreviation code:**

1   In **Mercury Administration**, access the **Abbreviation Codes** screen.

2   From the list of existing abbreviation codes, select the abbreviation code you want to modify.

3   Change the information for the abbreviation code as necessary.

4   Click **Update**.

5   Click **Apply** to save your changes exiting this screen.

Removing Abbreviation Codes

TASK   **To remove abbreviation codes from FTD Mercury:**

1   In **Mercury Administration**, access the **Abbreviation Codes** screen.

2   From the list of existing abbreviation codes, select the code you want to remove.

3   Click **Remove**.

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

Address Types Screen

Address types allow you to save multiple addresses for employees and customers as you add them to the system. The following procedure teaches you how to add and remove address types.

The following address types are already set up for you in your system:

»   Home

»   School

»   Work

»   Other

NOTE   An address type cannot be removed if a customer or employee has an address stored in your system with that type.

Figure 24-33: Address Types Screen
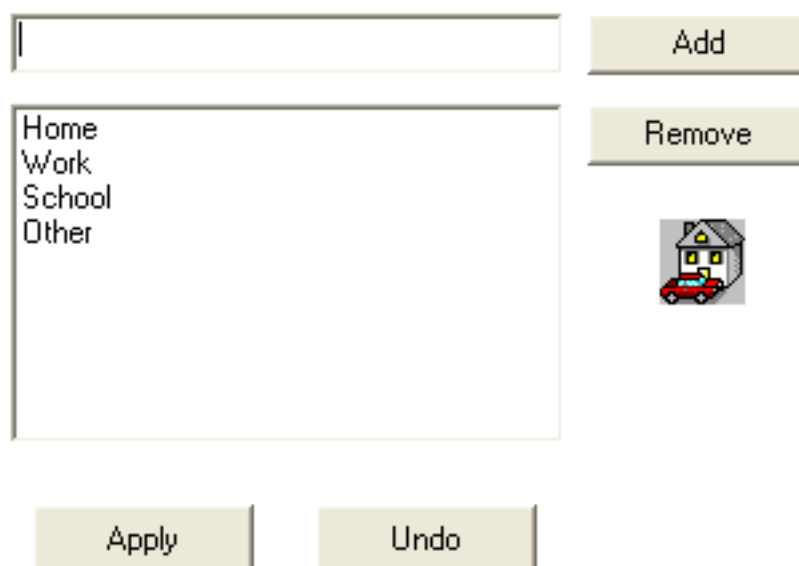
Accessing the Address Types Screen

TASK   **To access the Address Types screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **System** folder.
4   Double-click **Address Types**. The **Address Types** screen opens.

Adding an Address Type

TASK   **To add an address type:**

1   In **Mercury Administration**, access the **Address Types** screen.
2   In the upper text box, enter the address type.
3   Click **Add**.
4   Click **Apply** to save your changes before exiting this screen.

Removing Existing Address Types

TASK   **To remove an address type:**

1   In **Mercury Administration**, access the **Address Types** screen.
2   From the list of existing address types, select the address type you want to remove.
3   Click **Remove**.
4   Click **Apply** to save your changes before exiting this screen.

Reason Code Screen

Reason codes are used when explaining why a message is being sent—for example, why you are sending a cancellation (CAN) message to cancel an order. A list of common reason codes has been set up for you, including the following:

»   Below codified minimums

»   Confirm Address

> » Customer cancelled order
>
> » Not at work today
>
> » Out of delivery range
>
> » Patient Discharged
>
> » Price Adjustment
>
> » Product not available
>
> » Recipient not at address
>
> » Store Closed
>
> » Too late for delivery

Figure 24-34: Reason Code Screen
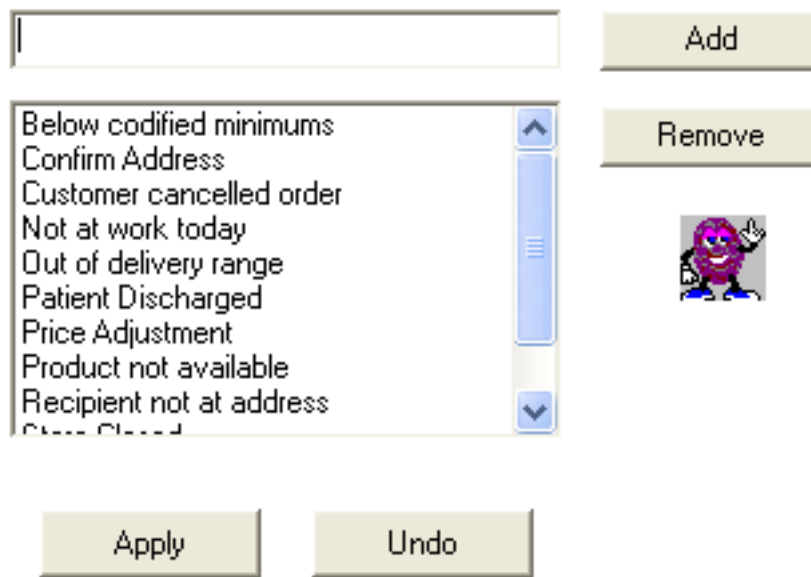
Accessing the Reason Code Screen

TASK **To access the Reason Code screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **System** folder.
4 Double-click **Reason Code**. The **Reason Code** screen opens.

Adding Reason Codes

TASK **To add a reason code:**

1 In **Mercury Administration**, access the **Reason Code** screen.
2 In the text box, enter the new reason code.
3 Click **Add**.
4 Click **Apply** to save the information before exiting this screen.

Removing Reason Codes

TASK   **To remove a reason code:**

1   In **Mercury Administration**, access the **Reason Code** screen.

2   From the list of existing reason codes, select the reason code you want to remove.

3   Click **Remove**.

4   Click **Apply** to save the information before exiting this screen.

Product Category Screen

Product categories are used as a tool to help you track what types of items are being sold in your store. They "categorize" your products (for example, "Cards," "Containers," "Perishables," etc.) so that you can evaluate what types of products are being sold and how. For example, many reports are sorted by product category, such as the Product Comparison Report, Product Sales Report, Business Snapshot Report, and Employee Analysis Report.

Product Categories are also important if you use the Accounting module (General Ledger with QuickBooks). When you export data from FTD Mercury to QuickBooks, product sales are exported to QuickBooks by product category. For example, all sales from your products with the "Perishables" product category are exported to the "Perishables" income account in QuickBooks.

By default all of the FTD Selection Guide products are assigned the product category Other. You may want to assign these products different product categories, or create one or more product categories to assign to the Selection Guide products. Note that each time you update the directory, you are adding new Selection Guide products. Therefore you may want to make a habit of updating the product categories of these products are soon as they are added to your database.

The following product categories have already been set up in FTD Mercury:

» Cards

» Container

» Fee

» Perishables

» Plush

» Other

To learn how to assign a product category to a product, see Adding New Products on page 8–5.

IMPORTANT   You cannot Remove or Rename a product category if a GL account has been created for that product category in the Chart of Accounts Wizard.

Figure 24-35: Product Category Screen
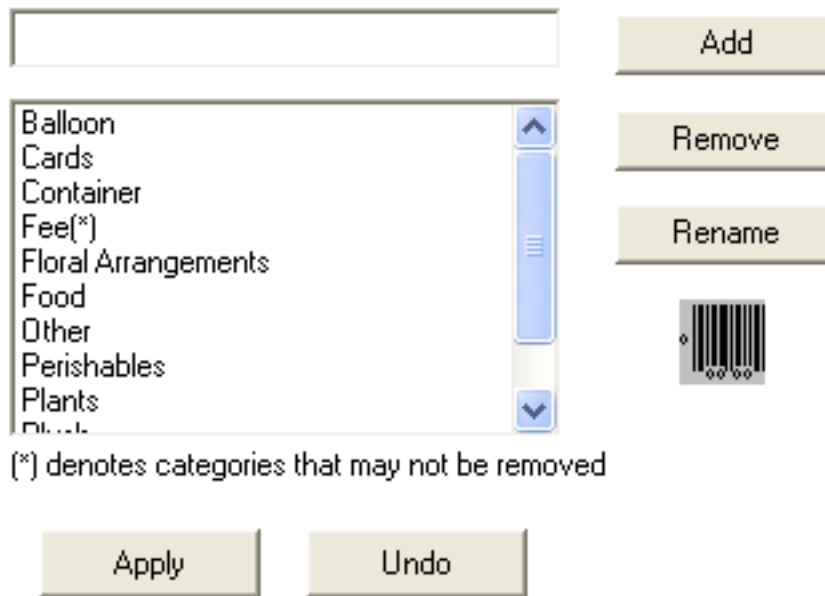
Accessing the Product Category Screen

TASK **To access the Product Category screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **System** folder.
4 Double-click **Product Category**. The **Product Category** screen opens.

Adding Product Categories

TASK **To add a product category:**

1 In **Mercury Administration**, access the **Product Category** screen.
2 In the text box, enter the name for the new category.
3 Click **Add**.
4 Click **Apply** to save your changes before exiting this screen.

Removing Product Categories

TASK **To remove an existing product category:**

1 In **Mercury Administration**, access the **Product Category** screen.
2 Select the category you want to remove from the list of existing product categories. Product categories that cannot be removed from your system are followed by (*).
3 Click **Remove**.
4 Click **Apply** to save your changes before exiting this screen.

Referral Codes Screen

Referral codes are used to explain how a new customer first heard about your store (for example, a newspaper advertisement). By default, the following referral codes are already set up in your system:

» Friend

» Newspaper Ad

» Radio Ad

» TV Ad

» Word of Mouth

» Other

» None

Figure 24-36: Referral Codes Screen
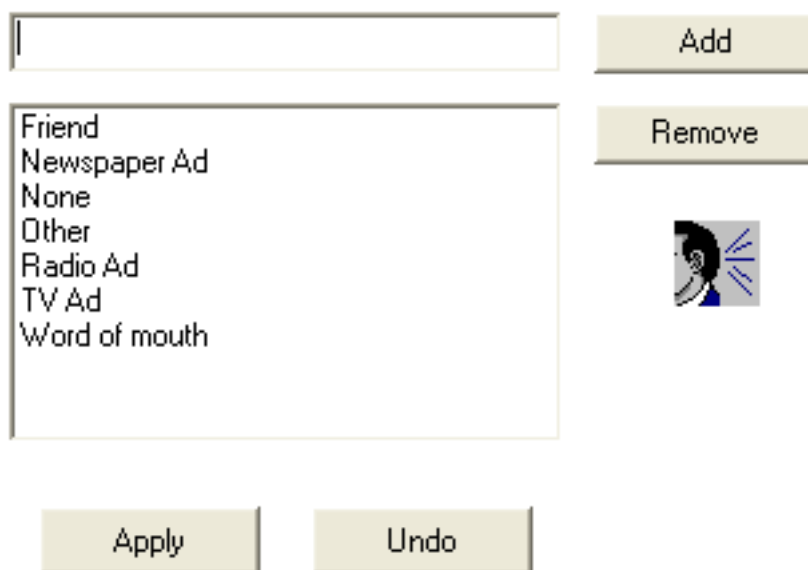
Accessing the Referral Codes Screen

TASK   **To access the Referral Codes screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **System** folder.
4 Click **Referral Code**. The **Referral Codes** screen opens.

Adding Referral Codes

TASK   **To add a referral code:**

1 In **Mercury Administration**, access the **Referral Codes** screen.
2 In the text box, enter the new referral code.
3 Click **Add**.
4 Click **Apply** to save your changes before exiting this screen.

Removing Referral Codes

TASK   **To remove a referral code:**

1 In **Mercury Administration**, access the **Referral Codes** screen.
2 In the list of existing referral codes, select the referral code you want to remove.
3 Click **Remove**.
4 Click **Apply** to save your changes before exiting this screen.

Phone Types Screen

Phone types are used when entering customer and employee information into FTD Mercury. They allow you to enter multiple phone numbers so you can, for example, save both a customer's home and business phone numbers.

By default, the following phone types are already set up in your system:

» Cell Phone

» E-mail

» Fax

» Home

» School

» Work

» Work2

» Other

NOTE
You cannot remove a phone type if an employee or customer has a phone number stored in your system using that phone type.

Figure 24-37: Phone Types Screen
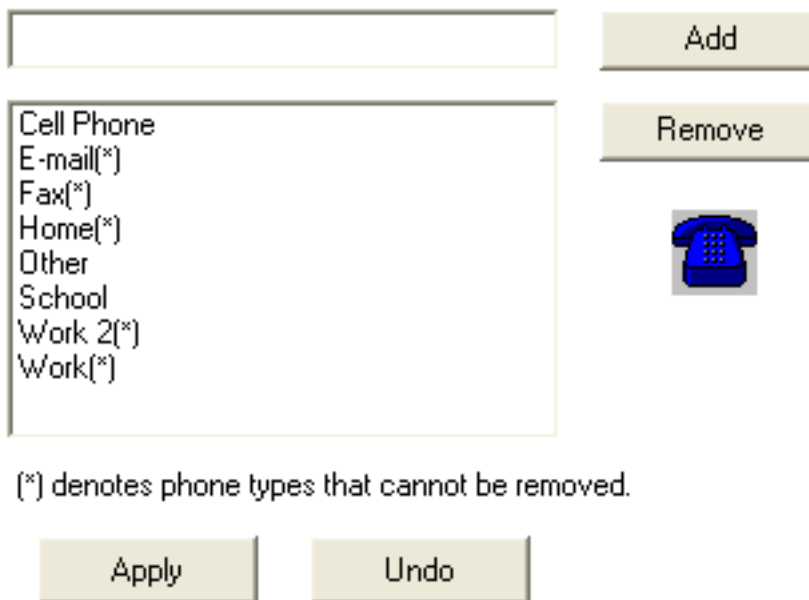
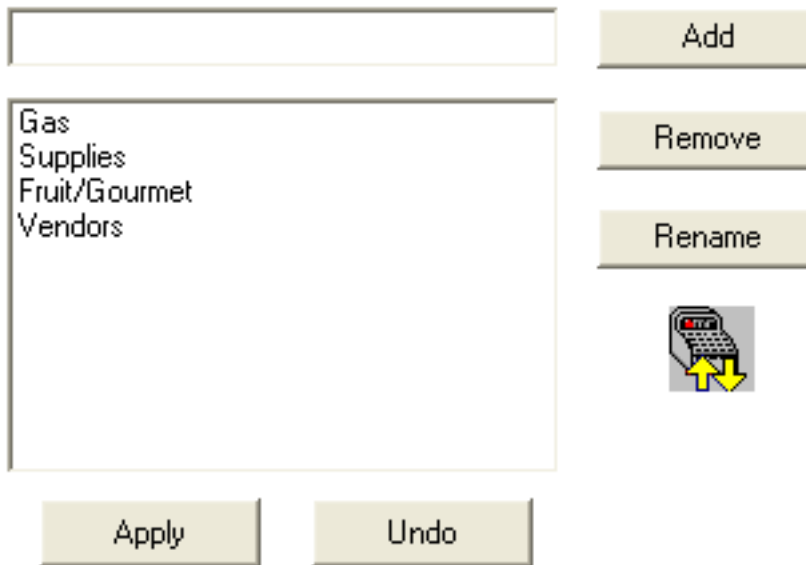

Accessing the Phone Types Screen

TASK   **To access the Phone Types screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **System** folder.
4   Double-click **Phone Types**. The **Phone Types** screen opens.

Adding Phone Types

TASK   **To add a new phone type:**

   1   In **Mercury Administration**, access the **Phone Types** screen.
   2   In the text box, enter the name for the new phone type.
   3   Click **Add**.
   4   Click **Apply** to save your changes before exiting this screen.

Removing Existing Phone Types

NOTE   You cannot remove a phone type if an employee or customer has a phone number stored in your system using that phone type.

TASK   **To remove an existing phone type:**

   1   In **Mercury Administration**, access the **Phone Types** screen.
   2   From the list of existing phone types, select the phone type you want to remove. You cannot remove phone types that are denoted with an asterisk (*).
   3   Click **Remove**.
   4   Click **Apply** to save your changes before exiting this screen.

Paid Out/In Types Screen

Paid out and paid in types are reasons why cash must be added or removed from the cash register drawer in Point of Sale. For example, you may have to use the Paid Out function to take cash out of the drawer to pay for gas for the delivery truck, or pay for candy or fruit for fruit baskets. The Paid In function is then commonly used to return change to the cash drawer. For details on creating and removing Paid Out types, see Setting Up Paid Out/In Types on page 11–2.

If you have the Accounting module, accounts are set up in QuickBooks for your paid in/out types. The accounts are either categorized as Cost of Goods Sold accounts or Operating Expense accounts, depending on how you set them up when you ran the Chart of Accounts Wizard. Note that if you add a paid in/out type in Mercury Administration, you must go through the Chart of Accounts Wizard again so that FTD Mercury can export the information to QuickBooks and add an account for that paid in/out type. For more information see the QuickBooks section of your FTD Mercury Reference Guide.

Figure 24-38: **Paid Out/In Types Screen**


Accessing the Paid Out/In Types Screen

TASK | **To access the Paid Out/In Types screen in Mercury Administration:**

1 Launch **Mercury Administration**.

2 Double-click **Mercury Administration** in the explorer pane.

3 Double-click the **System** folder.

4 Click **Paid/Out In Types**. The **Paid Out/In Types** screen opens.

Advanced Settings Screen

The Advanced Settings screen allows you to configure Dashboard information and purge intervals for log entries.

Figure 24-39: **Advanced Settings Screen**
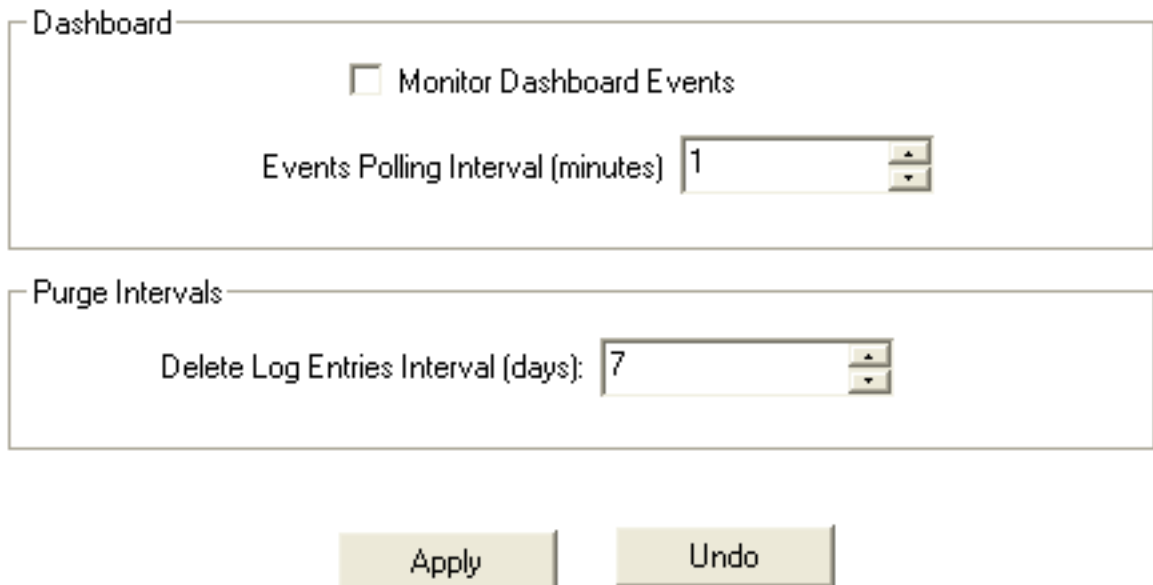
The following settings are configurable:

Table 24-26: Advanced Settings

Setting	Description
Monitor Dashboard Events	Select this option if you want to enable the FTD Mercury Dashboard.
Events Polling Interval	Set the frequency (in minutes) at which the Dashboard will check for new events.
Delete Log Entries Interval	Enter the interval in days between log purges.

Accessing the Advanced Settings Screen

TASK   **To access the Advanced Settings screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **System** folder.
4   Double-click **Advanced Settings**. The **Advanced Settings** screen opens.

Printer Settings Folder

The following screens are accessible from the Printer Settings folder:

» Form Alignment Screen

» Printer Routing Screen

» Default Form Printing Screen

» Form Format Screen

Form Alignment Screen

The Form Alignment screen (previously called the Address Settings screen) allows you to position the store address, return address, and customer address on the statement and invoice so that you can print them on your own custom letterhead, and so that they properly fit in your window envelope. The process of formatting the invoice and statement for your envelope takes some trial and error. First print out one statement and one invoice, and see where you will have to move the addresses so that they will fit. Then use this option to position the addresses.

Figure 24-40: Form Alignment Screen

Store Address

The Store Address area allows you to configure the settings for the store address on both invoices and statements. You can configure the following settings:

Table 24-27: Store Address Settings

Setting	Invoice
Invoice	Select the position where you want your store address to print on the invoice. You can select Center (for Billing Invoices only), Left, or None to omit the store address from the invoice.
Statement	Select the position where you want your store address to print on statements. You can select Left to print it on the left side of the statement, or select None to omit it from the statement.

Invoice Address Positioning

The Invoice Address Positioning area allows you to customize the positioning of the return and customer address on the Order Entry invoice so they fit in your window envelope or print correctly on your letterhead paper. Drag the sliders to the desired position (one vertical position equals one line) for both the return address and customer address.

Statement Address Positioning

The Statement Address Positioning area allows you to customize the positioning of the return and customer address on statements. Drag the sliders to the desired positions.

Accessing the Form Alignment Screen

TASK   **To access the Form Alignment screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Printer Settings** folder.
4   Double-click **Form Alignment**. The **Form Alignment** screen opens.

Configuring Form Alignment Settings

TASK   **To configure form alignment settings:**

1   In **Mercury Administration**, access the **Form Alignment** screen.
2   In the **Store Address** area, set the position for the store address for both invoices and statements.
3   In the **Invoice Address Positioning** area, select the position for both the return address and the customer address on invoices. If at any time you want to change your settings back to their defaults, click **Restore Invoice Defaults**.
4   In the **Statement Address Positioning** area, select the position for both the return address and customer address on statements. If at any time you want to change your settings back to their defaults, click **Restore Statement Defaults**.
5   Click **Apply** to save your changes before exiting this screen.

Printer Routing Screen

The Printer Routing screen allows you to specify for each incoming and outgoing message type the number of copies you want printed when a message is sent or received. You can also specify the printer and printer tray to use when printing.

Figure 24-41: Printer Routing Screen

For each message type, you can also select further behavior:

Table 24-28: Message Behavior

Setting	Description
Print	The message prints to the designated printed.
Popup	You receive a message confirming the message has been sent or received. For example: The General message has been sent.
Print and Popup	The message both prints to your printer and you receive a confirmation message.
Print and Alarm	The message prints to your printer and a short beep sounds.

Accessing the Printer Routing Screen

TASK   **To access the Printer Routing screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Wire Service** folder.

4 Double-click **Printer Routing**. The **Printer Routing** screen opens.

Changing Printer Routing Options

TASK **To change printer routing options:**

1 Access the **Printer Routing Options** screen in Mercury Administration.

2 By default, your shop code appears in the **Shop Code** field. click the arrow and choose the shop code for which you want to set printer routing from the list.

3 To change the default Mercury Message printer, click the arrow in the **Printer** list and choose your default printer. All messages print to this printer (unless otherwise specified).

4 To change the default printer tray, click the arrow in the **Default Tray** list and choose a default tray for your printer.

5 Click **Advanced** if you want to change the method of printer routing or the number of copies that you want to print for each message type.

6 Initially, one copy of each incoming and outgoing message type prints to your default printer and tray. To change these settings, follow the procedures below:

    a. Click to the right of the word **Print** to reveal an arrow, and choose from the list whether you want that particular message to print, pop up on your screen, print & popup, print & alarm, or none of these. See Printer Routing Screen on page 24–79 for explanation.

    b. To change the tray to which this message will print, click to the right of the default tray name to reveal an arrow and then click the desired tray name.

    c. Click to the right of the number to change the number of copies. When the up and down arrows appear, select the number of copies you wish to print at each printer.

    d. When finished, click **Close**.

7 Click **Apply** to save the information before exiting this screen.

Default Form Printing Screen

The Default Form Printing screen allows you to define the number of each form type that will print depending on the delivery zone type selected. You can specify how many of each of the following forms will print for Carry Out, Pickup, Local, Pool, and Wire Out zones:

» Billing Invoice (Letter)

» Billing Invoice (Legal)

» Working Invoice (Letter)

» Working Invoice (Legal)

» TriFold Card

Figure 24-42: Default Form Printing Screen

Store Name: Margie's Flowers

Default Form Printing

Forms	Carry Out	Local	Pickup	Wire Out	Pool
Billing Invoice (Letter)	0	0	0	0	0
Billing Invoice (Legal)	1	1	1	1	1
Worksheet (Letter)	0	0	0	0	0
Worksheet (Legal)	0	0	0	0	0
TriFold Card	0	0	0	0	0
Pool Ticket	0	0	0	0	0

Apply   Undo

Accessing the Default Form Printing Screen

TASK   **To access the Default Form Printing screen in Mercury Administration:**

1   Launch **Mercury Administration**.

2   Double-click **Mercury Administration** in the explorer pane.

3   Double-click the **Printer Settings** folder.

4   Double-click **Default Form Printing**. The **Default Form Printing** screen opens.

Configuring Forms to Print

TASK   **To configure the number and type of forms to print for zone types:**

1   Access the **Default Form Printing** screen in **Mercury Administration**.

2   Select the name of the store you are configuring from the **Store Name** list (if it is not already selected).

3   For each form type, click in the delivery zone column and use the up and down arrows to set the number of forms you want to print.

4   When you are finished, click **Apply** to save your changes before exiting the screen.

TIP   If you are set up as a multi-store shop, you can select another store from the **Store Name** list before you exit the screen. Your settings are retained, allowing you to simply click **Apply** to save these changes for other stores.

Form Format Screen

The Form Format screen allows you to configure the information that FTD Mercury prints on forms. You can configure the following forms:

»   Billing Invoice (Letter)

»   Billing Invoice (Legal)

»   Working Invoice (Letter)

»   Working Invoice (Legal)

»   TriFold Card

When you configure the information that prints on forms, you are configuring it for all forms printed from your store. If you are configured as a multi-store shop, you can configure printing on a per-shop basis.

Figure 24-43: Form Format Screen

Billing Invoice (Letter)

The Billing Invoice (Letter) form is used for printing a billing invoice without an attached card. The form is 8½×11 inches, and contains the following sections and options:

Table 24-29: Billing Invoice (Letter) Configurable Sections and Information

Section	Information Available to Print
Header	» Store Name » Store Address » Order No » Bar Code » Amount Remitted » Delivery Date » Time Detail
Sold To	» Customer Address » Customer Phone » Ordered By
Deliver To	» Recipient Address » Recipient Phone

Table 24-29: Billing Invoice (Letter) Configurable Sections and Information (cont.)

Section	Information Available to Print
Order Info	» Order No » Customer No » Order Date » Delivery Date » Pay Method » Sales Person » Order Type » Copy No
Credit Card	» Cardholder » Number » Authorization
Occasion	» Occasion » Card Message » Order Notes
Florist Info	» Florist Code » Florist Name » Florist City » Florist Phone » Contact » Mercury No
Delivery Slip	» Order No » Delivery Zone » Signature Line » Products » Copy No » Bar Code » Store Name » Recipient Phone

Billing Invoice (Legal)

The Billing Invoice (Legal) form is the legal-sized version (8½×14 inch) of the billing invoice. It includes all of the information on the Billing Invoice (Letter) form, but also includes a quad-fold

card. In versions of FTD Mercury prior to 8.0, this was the only invoice available. The sections and options available to print include

Table 24-30: **Billing Invoice (Legal) Configurable Sections and Information**

Section	Information Available to Print
Header	» Store Name » Store Address » Order No » Bar Code » Amount Remitted » Delivery Date » Time Detail
Sold To	» Customer Address » Customer Phone » Ordered By
Deliver To	» Recipient Address » Recipient Phone
Order Info	» Order No » Customer No » Order Date » Delivery Date » Pay Method » Sales Person » Order Type » Copy No
Credit Card	» Cardholder » Number » Authorization
Occasion	» Occasion » Card Message » Order Notes
Florist Info	» Florist Code » Florist Name » Florist City » Florist Phone » Contact » Mercury No
Delivery Slip	» Order No » Delivery Zone » Signature Line » Products » Copy No » Bar Code » Store Name » Recipient Phone

Table 24-30: Billing Invoice (Legal) Configurable Sections and Information (cont.)

Section	Information Available to Print
Card	» Recipient Phone » Delivery Date » Time Detail » Order No » Care Instructions **NOTE:** When you select Sympathy as the Occasion Code in Order Entry or Point of Sale, legal-sized invoices print the acknowledgement address (the sender's address) instead of the care instructions. Clearing this option does not prevent the acknowledgement address from printing. » Guarantee » Bar Code » Store Name » Delivery Zone » Rotate 90 Degrees—allows you to rotate the card message and guarantee 90 degrees clockwise and the care instructions 90 degrees counterclockwise. The address portion of the card does not rotate. If you have a funeral/sympathy card (when the occasion selected in Order Entry or Point of Sale is Sympathy), the care instructions are replaced by they sympathy sender's address and this text does not rotate.

Working Invoice (Letter)

The Working Invoice (Letter) form is an invoice to use internally for a designer. It is printed on letter-sized paper (8½×11 inch) and includes the following sections:

Table 24-31: Working Invoice (Letter) Configurable Sections and Information

Section	Information Available to Print
Header	» Order No » Bar Code » Store Name » Order Type » Delivery Date » Time Detail
Order Info	» Customer Name » Customer Phone » Ordered By » Pay Method » Sales Person » Occasion » Copy No

Table 24-31: Working Invoice (Letter) Configurable Sections and Information (cont.)

Section	Information Available to Print
Florist Info	» Florist Code » Florist Name » Florist City » Florist Phone » Contact » Mercury No
Delivery Slip	» Order No » Delivery Zone » Signature Line » Products » Copy No » Bar Code » Store Name » Recipient Phone Delivery date and day will always print you delivery slips.
Product Info	» Product Code » Product Recipe » Second Choice » Order Notes » Card Message

Working Invoice (Legal)

The Working Invoice (Legal) form is the legal-sized (8½×14 inch) version of the Working Invoice (Letter), and it includes all the information in the letter-sized version plus a quad-fold card. This worksheet includes the following sections:

Table 24-32: Working Invoice (Legal) Configurable Sections and Information

Section	Information Available to Print
Header	» Order No » Bar Code » Store Name » Order Type » Delivery Date » Time Detail
Order Info	» Customer Name » Customer Phone » Ordered By » Pay Method » Sales Person » Occasion » Copy No

Table 24-32: Working Invoice (Legal) Configurable Sections and Information (cont.)

Section	Information Available to Print
Florist Info	» Florist Code » Florist Name » Florist City » Florist Phone » Contact » Mercury No
Delivery Slip	» Order No » Delivery Zone » Signature Line » Products » Copy No » Bar Code » Store Name » Recipient Phone Delivery date and day will always print you delivery slips.
Card	» Recipient Phone » Delivery Date » Time Detail » Order No » Care Instructions NOTE: When you select Sympathy as the Occasion Code in Order Entry or Point of Sale, legal-sized invoices print the acknowledgement address (the sender's address) instead of the care instructions. Clearing this option does not prevent the acknowledgement address from printing. » Guarantee » Bar Code » Store Name » Delivery Zone » Rotate 90 Degrees—allows you to rotate the card message and guarantee 90 degrees clockwise and the care instructions 90 degrees counterclockwise. The address portion of the card does not rotate. If you have a funeral/sympathy card (when the occasion selected in Order Entry or Point of Sale is Sympathy), the care instructions are replaced by they sympathy sender's address and this text does not rotate.
Product Info	» Product Code » Product Recipe » Second Choice » Order Notes » Card Message

TriFold Card

The TriFold Card form in FTD Mercury allows you to print on a 4×9½-inch trifold card. The card itself consists of three sections. The upper section (3×4 inches) is for the card message. The middle

section (3¼×4 inches) is for care instructions. The bottom section (3¼×4 inches) is for the recipient name and address.

NOTE   Trifold cards require a printer capable of handling the smaller paper size. For more information, contact FTD Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com.

By default, FTD Mercury leaves a ¼ inch border on all sides of the card message section so you can use imprinted cards for you shop. Additionally, FTD Mercury leaves a ½ inch border at the bottom of the recipient section so you can use cards with your store logo (if desired).

There is only one section available to print for the TriFold card: Card. You can select whether you want to print the following information:

» Recipient Phone

» Delivery Date

» Time Detail

» Delivery Zone

» Order No

» Care Instructions

NOTE   When you select Sympathy as the Occasion Code in Order Entry or Point of Sale, legal-sized invoices print the acknowledgement address (the sender's address) instead of the care instructions. Clearing this option does not prevent the acknowledgement address from printing.

» Bar Code

» Store Name

» Borders

» Center Tray—when this option is selected, FTD Mercury assumes the card is in the center of a tray. When cleared, FTD Mercury assumes the card is in the left side of the tray. Configure this setting as appropriate for your card stock location in the tray.

By default, all information will print for the TriFold Card form except for Borders. If you do not print borders, you can easily use imprinted paper for your trifold cards.

IMPORTANT   Guarantees, available on cards for the Billing Invoice (Legal) and Working Invoice (Legal), are not available for the TriFold Card form.

Accessing the Form Format Screen

TASK   **To access the Default Form Printing screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Printer Settings** folder.
4 Double-click **Form Format**. The **Form Format** screen opens.

Configuring Information to Print in Forms

TASK   **To configure the information that prints in a form:**

1 Access the **Form Format** screen in **Mercury Administration**.
2 If you are configured as a multi-store, from the **Store Name** list, select the store for which you are configuring the form.
3 From the **Form Name** list, select the form you are configuring.

4   From the **Select Section** list, select the section on the form you want to configure. Information that you can print appears in the list on the right. If you want the information to print on the form, select the appropriate box; clear boxes if you want information to be omitted from the form. Repeat for other sections.

5   Click **Apply** to save your changes.

You will have to restart FTD Mercury clients for your changes to be reflected. The changes you made affect all orders printed on the form you configured for the selected store.

Wire Service Folder

The following screens are accessible from the Wire Service folder:

»   WireServices Screen

»   CurrencySettings Screen (available only on Canadian systems)

»   Automatic Order Processing Screen

WireServices Screen

The WireServices option allows you to update your florist directories and allocate wire service percentages. If you are set up as a Canadian shop, you can also set the current exchange rate and set the conversion chart multiplier.

Figure 24-44: WireServices Screen

Base Amount	Sender	Receiver	Wire Service
$ 30.00	10.00	83.00	7.00
$99,999.99	20.00	73.00	7.00

The WireServices screen contains the following settings:

Table 24-33: **WireServices Screen Settings**

Setting	Description
Wire Service List	Select the wire service to which you are making changes. You may update the floral directory for the wire service, or, if you are a Canadian shop, you can set the current exchange rate and conversion chart multiplier for the selected wire service.
Update Directory	Click the Update Directory button to begin updating the floral directory for the selected wire service.
Current Exchange Rate	*Applies only to Canadian shops.* Enter the exchange rate percentage to use when converting U.S. funds to Canadian funds for the selected wire service. When outgoing orders are transmitted from Canadian shops using Canadian currency to U.S. shops using U.S. currency, the value here will be used to convert the funds. This rate is also used in processing incoming orders in U.S. dollars to Canadian dollars.
	This field will accept up to eight digits to the right of the decimal point.
	This exchange rate is used to convert Canadian currency entered in Order Entry to U.S. dollars when an outgoing order is transmitted to the United States. It is also used to convert U.S. currency to Canadian dollars when an incoming order is received in U.S. dollars.
Conversion Chart Multiplier	*Applies only to Canadian shops.* For the currently selected wire service, enter the multiplier from the tax conversion charts in this field. This field will accept up to four digits to the right of the decimal point.
	The conversion chart multiplier is used to compute the fill value of incoming wire orders received from outside Canada that are subject to additional taxation.
	The conversion chart multiplier is used when from the U.S. are received in Canada. This formula, provided by each wire service, allows FTD Mercury to compute the Canadian dollar amount to be used when filling the order, taking into account taxes. For example, if the conversion chart multiplier for a GST province is 91% (.91), if you receive an order from the United States for $100 CDN, the fill value of the order should be $91.00 CDN.
	FTD lists the conversion chart multiplier in the printed FTD Directory as a conversion chart; other directories call it filling order conversion chart (or something similar).
Wire Dollar Limit	This section provides a breakdown of the allocation of funds for base amounts listed. You should not change the percentages in this screen unless you are instructed to do so by your wire service.

Accessing the WireServices Screen

TASK   **To access the Wire Services screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Wire Service** folder.
4   Double-click **WireServices**. The **WireServices** screen opens.

Updating the Florist Directory

The following procedure teaches you how to update your florist directories when you receive new directory CDs from FTD. This process takes about 20 minutes.

NOTE   To learn how to receive updates in between CDs (via an Internet download), see "Bi-Monthly Directory Update" on page 60.

1   Close FTD Mercury by clicking ⊠ in the upper right-hand corner of the **FTD Mercury Main Menu**.

2   Shut down the server. To do this, right-click on the black Mercury Man icon in the lower right-hand corner of the screen (in the system tray) and select **Close**.

3   In Mercury Administration, access the WireServices screen.

4   Place a florist directory CD into your CD-ROM drive. You will be updating each directory individually.

5   In the **Wire Service** area, select the wire service directory you are updating.

6   Click **Update Directory**. The directory takes about 10–20 minutes to update. The process may seem to pause for periods of time, but the update completes only when the black DOS window closes.

7   When the process is complete, remove the update CD.

8   Repeat steps 4–7 for each directory that you are updating.

9   Restart the server. To do this, on the **Windows Start** menu, point to **All Programs**, then point to **FTD Software**, and click **FTDStartup**.

Your florist directories are now updated. You can now start and log into FTD Mercury.

Setting the Current Exchange Rate

NOTE   This procedure applies only to Canadian systems.

For the FTD wire service, you should set the exchange rate to the value in the printed FTD Florist Directory.

TASK   **To set the current U.S. to Canada exchange rate:**

1   In **Mercury Administration**, access the **WireServices** screen.

2   From the **Wire Service** list, select the wire service for which you are setting the exchange rate.

3   In the **Current Exchange Rate** field, enter the current exchange rate to use when converting U.S. dollars to Canadian dollars.

4   Click **Apply** to save your changes before exiting this screen.

Setting the Conversion Chart Multiplier

For the FTD wire service, you should set the conversion chart multiplier to the value printed in the FTD Florist Directory.

NOTE   This procedure applies only to Canadian systems.

TASK   **To set the conversion chart multiplier:**

1   In **Mercury Administration**, access the **WireServices** screen.

2   From the **Wire Service** list, select the wire service for which you are setting the conversion chart multiplier.

3   In the **Conversion Chart Multiplier** field, enter the conversion chart multiplier value.

4   Click **Apply** to save your changes before exiting this screen.

Allocating Wire Service Percentages

IMPORTANT   You should not change the percentages in this screen unless you are instructed to do so by your wire service.

If you need to change the allocation of funds, enter the new base amount and sender, receiver, and wire service percentages in their appropriate columns. Entries must total 100%, and your system coordinates its percentages to total 100%. Be sure your base prices in the **Base Amount** column are entered in ascending order (smallest dollar amount to greatest).

NOTE   The Wire Service Commissions account in the General Ledger module uses the percentage specified in the Sender column for the appropriate base amount. Meanwhile, the Wire Service Payable account in the General Ledger module uses the percentages specified in the Receiver and Wire Service columns for the appropriate base amount.

Click **Apply** to save the information before exiting this screen.

CurrencySettings Screen

NOTE   This screen is only accessible if FTD Mercury is configured as Canadian.

By default, FTD Mercury identifies the origin of a florist by using the state or province information from the Florist Directory.

The CurrencySettings screen allows you to configure currency settings for florist shop code numbers that are not listed in the Florist Directory. For these florists, you can define the florist's shop code, whether the florist is inside or outside of Canada, and whether funds received from this florist is in U.S. currency.

Figure 24-45: CurrencySettings Screen

The CurrencySettings screen contains the following settings:

Table 24-34: CurrencySettings Screen Settings

Setting	Description
Florist Code	Enter a florist code for a florist not in the directory for which you need to configure how to handle currency settings. The code must be at least 3 characters in length and no more than 11 (including a mandatory hyphen in the third position). The code can only consist of alphanumeric characters and the hyphen in the third position.
Out of Country	Select this option if this florist is outside of Canada. By default, when you enter a florist in this screen, this option will be selected. If this option is not selected, FTD Mercury will process orders received from this florist as coming from within Canada.
US Currency	When this option is selected, orders from this florist are received in U.S. currency. By default, this option is selected. When this option is not selected, orders received from this florist are assumed to be received in Canadian funds.

Several florist ID numbers used by FTD divisions are included in this list by default; these ID numbers cannot be removed or changed. They are:

Table 24-35: Default Listings in the CurrencySettings Screen

FTD Division	Code	Out of Country	U.S. Currency
FTD.com	90-8400AA	X	X
Flowers All Hours (FAH)	90-9200AA		
Flowers Online (FOL)	90-8418AA		
Canadian Domestic Retrans	70-0336AA		
International Retrans	90-0266AA	X	
International Retrans	90-0266US	X	

Accessing the CurrencySettings Screen

IMPORTANT   This screen is accessible only for Canadian shops.

TASK   **To access the CurrencySettings screen in Mercury Administration:**

1 Launch **Mercury Administration**.
2 Double-click **Mercury Administration** in the explorer pane.
3 Double-click the **Wire Service** folder.
4 Double-click **CurrencySettings**. The **CurrencySettings** screen opens.

Adding a Non-Directory Florist

IMPORTANT   This procedure only applies to Canadian shops.

TASK   **To add a non-directory florist to FTD Mercury for currency processing purposes:**

1 Access the **CurrencySettings** screen in **Mercury Administration**.
2 In the **Florist Code** column, click in an empty cell.

3   Enter the florist code for the florist. The code must be at least 3 characters in length and no more than 11 characters (including a mandatory hyphen in the third position) and must consist only of alphanumeric characters and the hyphen in the third position. FTD Mercury will automatically adjust your entry to fit its expected format.

4   If the florist is outside of Canada, ensure the **Out of Country** check box is selected.

5   If the florist is sending money in U.S. currency, select the **US Currency** check box. Otherwise, FTD Mercury will assume the money is in Canadian funds.

6   Click **Apply** to save your changes before exiting this screen.

Removing Non-Directory Florists

IMPORTANT   This procedure only applies to Canadian shops.

TASK   **To remove a florist from the CurrencySettings screen:**

1   Access the **CurrencySettings** screen in **Mercury Administration**.

2   In the **Florist Code** column, right-click the florist code and click **Remove**.

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

Automatic Order Processing Screen

The Automatic Order Processing screen in Mercury Administration allows you to configure settings for how FTD Mercury automatically handles incoming messages (Mercury orders, Flowers All Hours, Florists Online, and Web orders using the Web Order Interface). For more information on Automatic Order Processing, see

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IMPORTANT   You can only use Automatic Order Processing if you process credit cards over the Internet, as opposed to processing them through a dial-up (modem) connection. If you are not configured to process credit cards over the Internet, the configurations on this screen will be disabled.

If an order cannot automatically be processed (because it lacks necessary information), you will have to attach the order manually in Order Entry or Point of Sale.

Automatic order processing is defined on a per-store basis, meaning if you are configured as a multi-store system, you must configure settings for how each store handles order processing.

For each store, you need to configure how (and whether) FTD Mercury incoming orders, Flowers All Hours (FAH) orders, Florists Online (FOL) orders, and orders from your Web site (via the Web Order Interface) are processed. By default Automatic Order Processing is disabled. For each order type, all orders of that type will automatically be processed by the options you set.

»   **Local Orders**—When you select this option, FTD Mercury will automatically process local orders of the selected type. Incoming FTD Mercury orders can only be processed as local orders. If you select this option for an order type, the All Orders as Outgoing box will be cleared.

»   **Outgoing Orders**—When you select this option, FTD Mercury will automatically process outgoing orders of the selected type. If you select this option for an order type, the All Orders as Outgoing box will be cleared.

»   **All Orders as Outgoing**—When you select this option, all orders of the type you are configuring will be processed as outgoing orders. If you select this option, the Local Orders and Outgoing Orders boxes will be cleared.

If you want to disable automatic order processing in FTD Mercury for a particular order type, clear all check boxes for that order type. If you want to disable automatic order processing entirely, clear all check boxes in the order processing configuration grid.

Figure 24-46: **Automatic Order Processing Screen**

Accessing the Automatic Order Processing Screen

TASK   **To access the Automatic Order Processing Screen screen in Mercury Administration:**

1   Launch **Mercury Administration**.
2   Double-click **Mercury Administration** in the explorer pane.
3   Double-click the **Wire Service** folder.
4   Double-click **Automatic Order Processing**. The **Automatic Order Processing** screen opens.

Exiting Mercury Administration

TASK   **To exit Mercury Administration:**

Click ⊠ in the upper-right corner of the main window in Mercury Administration, or on the **File** menu, click **Exit**.