

Working with Orders

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

Order Tasks

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

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

Additional tasks can be found in [Additional Order Tasks & Windows](#) on page 9–81.

Point of Sale vs. Order Entry

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

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

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

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

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

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

Figure 9-1: Order Entry Colors

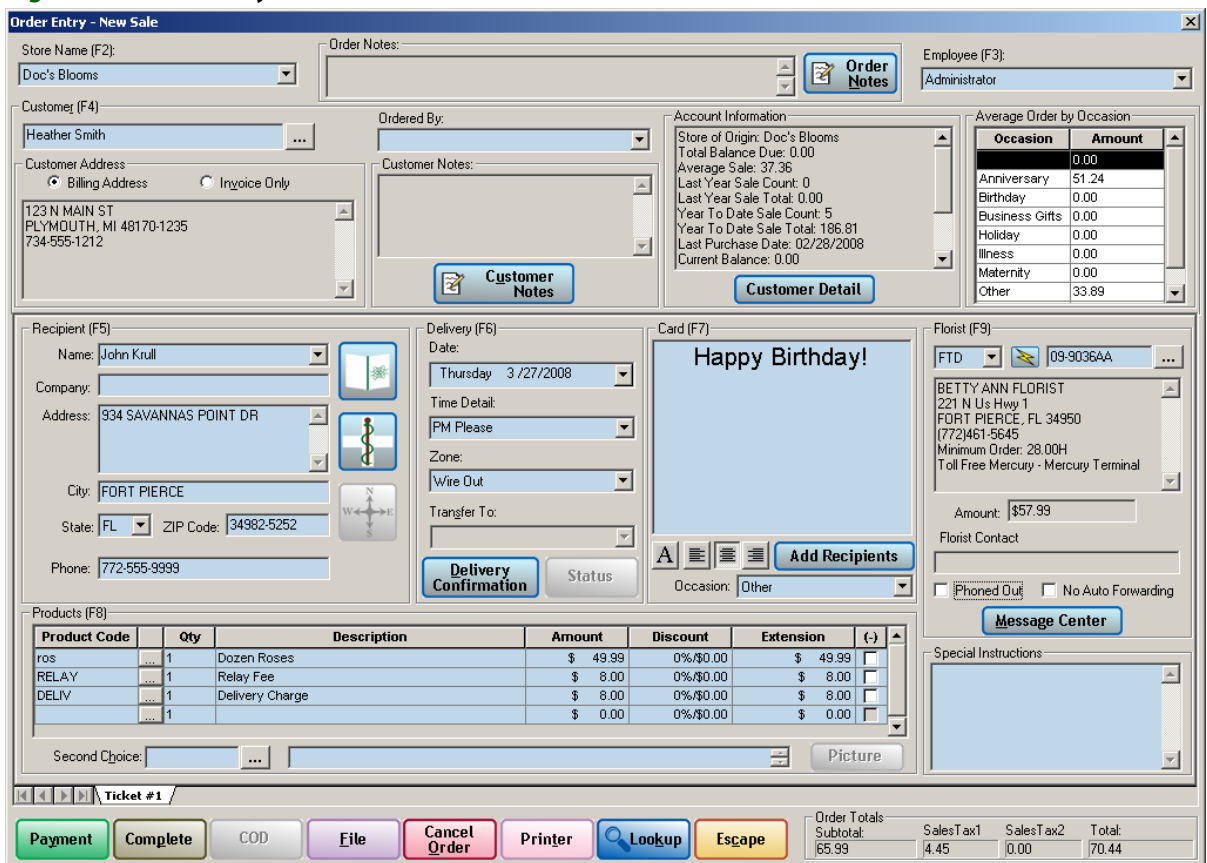


Figure 9-2: Point of Sale Colors

Point of Sale - New Sale

Store Name (F2): Doc's Blooms

Order Notes:

Order Notes

Employee (F3): Administrator

Customer (F4): Heather Smith

Ordered By:

Account Information:

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

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

X-Out Z-Out

No Sale

Paid Out/In

Receive Payment

Customer Notes

Customer Detail

Recipient (F5):

Name:

Company:

Address:

City:

State:

ZIP Code:

Phone:

Delivery (F6):

Date: Thursday 3/27/2008

Time Detail:

Zone: N/A

Transler To:

Delivery Confirmation

Status

Card (F7):

Florist (F9):

FTD

Amount: \$0.00

Florist Contact:

Phoned In

No Auto Forwarding

Message Center

Special Instructions:

Products (F8):

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

Second Choice:

Picture

Ticket #1

Payment Complete COD File Cancel Order Printer Lookup Escape

Order Totals:

Subtotal:	SalesTax1	SalesTax2	Total:
37.99	2.56	0.00	40.55

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

When to Use Order Entry vs. Point of Sale

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

Order Entry Window

The **Order Entry** window is the primary interface for order entry in FTD Mercury (unless you are using a Point of Sale system, in which case the similar Point of Sale window is the primary interface; see [Point of Sale Window](#) on page 9–10 for details on the differences). The backgrounds on fields in the Order Entry window are light blue, as opposed to the Point of Sale window, where they are light green.

Figure 9-3: Order Entry Window

Order Entry - New Sale

Store Name (F2): Doc's Blooms

Order Notes:

Customer (F4): Heather Smith

Customer Address:

Billing Address

123 N MAIN ST

PLYMOUTH, MI 48170-1235

734-555-1212

Ordered By:

Customer Notes:

Account Information:

Store of Origin: Doc's Blooms

Total Balance Due: 0.00

Average Sale: 37.36

Last Year Sale Count: 0

Last Year Sale Total: 0.00

Year To Date Sale Count: 5

Year To Date Sale Total: 186.81

Last Purchase Date: 02/28/2008

Current Balance: 0.00

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

Employee (F3): Administrator

Recipient (F5):

Name: John Krull

Company:

Address: 934 SAVANNAS POINT DR

City: FORT PIERCE

State: FL ZIP Code: 34902-5252

Phone: 772-555-9999

Delivery (F6):

Date: Thursday 3/27/2008

Time Detail: PM Please

Zone: Wire Out

Transler To:

Card (F7): Happy Birthday!

Florist (F9):

FTD 09-9036AA

BETTY ANN FLORIST

221 N Us Hwy 1

FORT PIERCE, FL 34950

(772)461-5645

Minimum Order: 28.00H

Toll Free Mercury - Mercury Terminal

Amount: \$57.99

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

Second Choice:

Ticket #1

Payment Complete COD File Cancel Order Printer Lookup Escape

Order Totals:

Subtotal: 65.99

SalesTax1: 4.45

SalesTax2: 0.00

Total: 70.44

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

Store Name

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

Press F2 to access this list.

Order Notes

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

Employee

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

Press F3 to access this list.

Customer

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

Table 9-1: Customer Areas/Fields

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

Recipient

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

Table 9-2: Recipient Fields

Field	Description
Name	<p>Enter the recipient's name. You can also click the arrow at the right side of this field to display a list of all recipients this customer has previously placed orders for—if the recipient is in this list, you can select the recipient name and remaining recipient information is automatically populated.</p> <p>You can also use abbreviation codes to enter recipient information for common recipients. If you enter Same, FTD Mercury uses the customer as the recipient.</p>

Table 9-2: Recipient Fields (cont.)

Field	Description
Company	If this order is being delivered to a business, enter the business name.
Address	Enter the street address for this recipient.
City	Enter the recipient's city.
State	Select the recipient's state or province.
ZIP Code	Enter the recipient's ZIP/postal code.
Phone	Enter the recipient's phone number.

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

Funeral Log Button

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

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

Facility Search Button

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

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

Map It Button

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

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

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

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

Product

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

Product Grid

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

The following information is displayed in each row:

Table 9-3: Product Grid Columns

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

Second Choice

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

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

Picture Button

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

Delivery

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

Table 9-4: Delivery Area Fields

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

Delivery Confirmation Button

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

Status Button

Click this button to view ticket status in the Ticket Status window. For more information, see [Ticket Status Window](#) on page 9-85.

Card

In the Card section, enter your card message. You can use an abbreviation code as a shortcut (for example, \hb for HAPPY BIRTHDAY!). See [Abbreviation Codes Screen](#) on page 24-64 for more details. Use the text and alignment buttons to format your message.

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

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

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

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

Florist

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

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

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

Florist Contact

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

Table 9-5: Florist Area Options

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

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

Special Instructions

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

Order Totals

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

Button Ribbon

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

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

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

Point of Sale Window

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

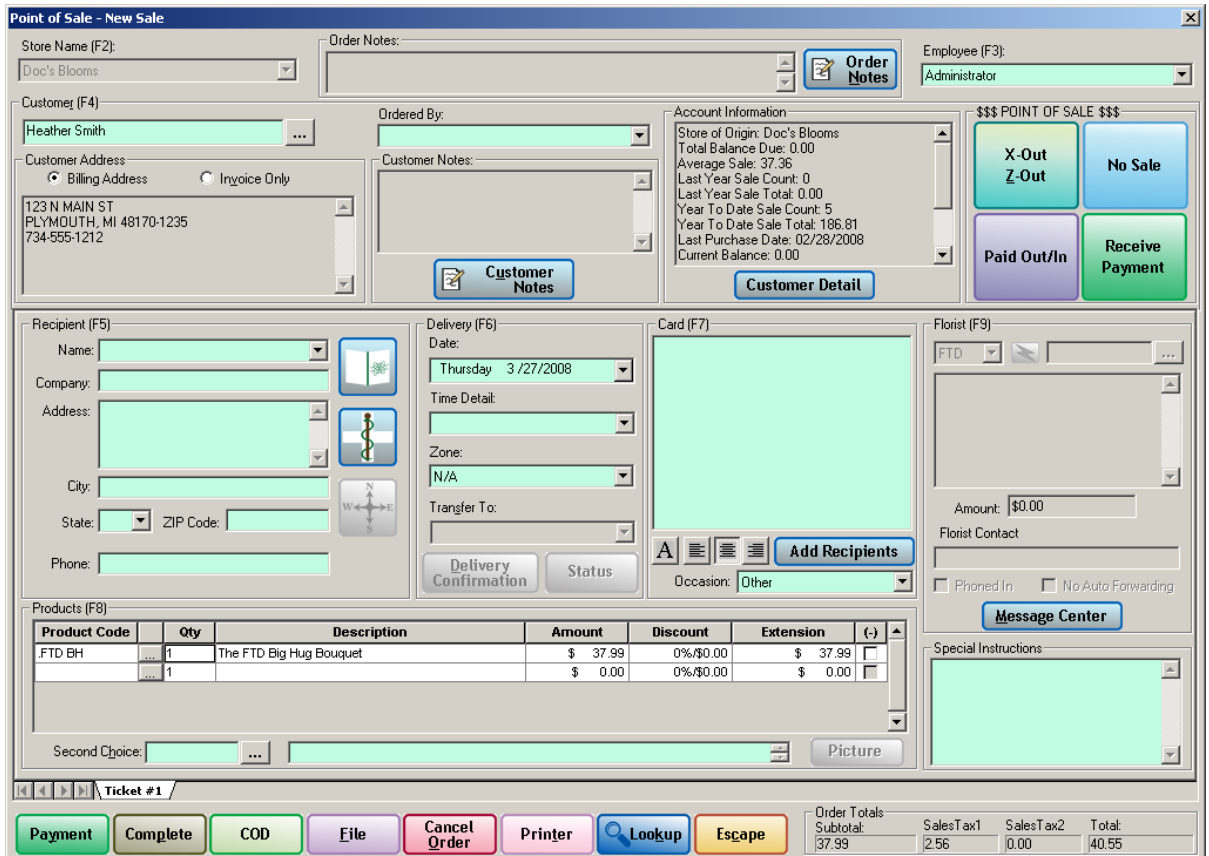
Table 9-7: Point of Sale–Specific Buttons

Button	Description
Opening Balance	Allows you to set the opening balance for the session. This button is only available after you have performed a z-out transaction; it is replaced by the X-Out/Z-Out button when a session is open. For more information, see Setting the Opening Balance on page 11–3.
No Sale	Allows you to perform a no sale transaction. For more information, see Processing a No Sale Transaction on page 11–4.
Paid Out/In	Allows you to enter a paid in or paid out transaction. See Processing a Paid Out or Paid In Transaction on page 11–5 for more information.

Table 9-7: Point of Sale–Specific Buttons (cont.)

Button	Description
Receive Payment	Allows you to receive payment on a house account. For more information, see Receiving Payments on House Accounts on page 18–1.
X-Out/Z-Out	Opens the Z-Out window and allows you to perform an X-Out or a Z-Out. See Processing a Z-Out Transaction on page 11–9 for more information.

Figure 9-4: Point of Sale Window



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

Navigating the Order Entry Window and Point of Sale Window

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

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

Title Bar

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

Hot Keys

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

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

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

Entering Orders

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

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

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

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

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

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

- » [Entering Wire Out Orders](#)
- » [Entering Phoned-Out Orders](#)

Order Entry Anatomy

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

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

TIP

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

Filling Out the Order Entry or Point of Sale Window

During day-to-day order taking, you spend a lot of time using the Order Entry and/or Point of Sale window. All order types require you to enter information; the information you need to enter depends on the order type. If you have a basic understanding of what to do in each area of these windows, you can easily handle any order type in an efficient manner.

Filling Out the Header Area

TASK To fill in the header area:

- 1 In Order Entry, if you are in a multi-store environment, select the store for the order from the Store Name list. In Point of Sale, you cannot change the store name.
- 2 From the Employee list, select your employee name.

Filling Out the Customer Area

TASK To fill in the Customer area:

- 1 In the Customer field, enter the customer name, phone number, or credit card number. If you need to perform a Customer Search, click the Search button (...), search for the customer, and click Select. When you return to Order Entry or Point of Sale, the Customer field is already filled in.
- 2 By default, billing address from the Customer's information is already displayed. However, if you need to specify an address only for this order, click Invoice Only and enter the address.

Filling Out the Recipient Area

TASK To fill in the Recipient area:

- 1 In the Name field, enter the recipient's name. Alternatively, you can click the arrow at the right of the field to display a list of any recipients to whom this customer has previously sent orders. If you find the recipient you are looking for, select them. Information will automatically fill into the remaining Recipient area fields. If everything is correct, you can move on to filling in Delivery information.

TIP You can use abbreviation codes to fill in the recipient area. Additionally, if you enter **Same**, the customer will be used as the recipient.

- 2 If the order is for a funeral already entered in Funeral Log, click the Funeral Log button and select the funeral. When you return to Order Entry/Point of Sale, the rest of the recipient information is already filled in.
- 3 If the order is going to a facility (for example, hospital or nursing home), click the Facility Search button to locate the facility. When you return to Order Entry/Point of Sale, the rest of the recipient information is already filled in.
- 4 In the Company field, enter the recipient's company (if this is going to a business).
- 5 In the Address field, enter the recipient's street address.
- 6 In the City field, enter the recipient's city.
- 7 From the State list, select the recipient's state or province.
- 8 In the ZIP Code field, enter the recipient's ZIP/postal code.
- 9 In the Phone field, enter the recipient's phone number.

Filling Out the Delivery Area

TASK To fill in the Delivery area:

- 1 In the Date field, enter the date for the delivery. You can also click the arrow button at the right of the field to display a calendar, from which you can select the delivery date.
- 2 From the Time Detail field, enter or select the time detail for the order.
- 3 From the Zone field, select the zone for delivery. Depending on your system configuration, this may already be filled in based on the recipient's address.
- 4 If you are in a multi-store environment and another store is going to fill this order, select the store from the Transfer To list.

- 5 If the customer wants email delivery confirmation, click the Delivery Confirmation button and enter the appropriate information.

Filling Out the Card Area

TASK To fill in the Card area:

- 1 In the Card field, enter the card message. Use the formatting buttons to change the font and alignment.
- 2 If there are going to be multiple, identical cards for this order, click the Add Recipients button and provide additional recipients. Additional cards with different recipient names will print.
- 3 From the Occasion list, select the occasion for the order.

Filling Out the Florist Area

The Florist Area is enabled if you are wiring out an order, phoning out an order, or have received a phoned-in order from another florist.

Wire Out Orders

TASK To fill out the Florist area for Wire Out orders:

- 1 From the Wire Service list, select the wire service for the florist to whom you are sending the order. Typically, this is FTD.
- 2 You can enter the florist's shop code (if you know it) in the Wire Code field. You can also click the Search button (...) to perform a Florist Search, or click the Auto Select button to let FTD Mercury automatically select a florist for you. Information about the florist appears below the wire code field if you select an FTD florist.
- 3 If you do not want this order automatically forwarded if the filling florist is unavailable, select the No Auto Forwarding check box. (In the overwhelming majority of cases, you should not select this check box.)
- 4 Ensure the Phoned Out check box is cleared.

Phoned-Out Orders

To fill out this area for phoned-out orders, you must have a wire out zone selected.

TASK To fill out the Florist area for phoned-out orders:

- 1 Select the Phoned Out check box.
- 2 From the Wire Service list, select the wire service you are using for the phoned-out message.
- 3 In the Wire Code field, enter the shop code of the florist you are calling. If it is an FTD wire code, information about the florist will appear in the field below the Wire Code field.
- 4 In the Florist Contact field, enter the name of the person you talked with at the filling florist's shop.
- 5 The Amount field is automatically populated by the product amount and delivery fees on the order. If you are a Canadian shop and sending U.S. dollars, select the US check box.

Phoned-In Orders

To fill out this area for phoned-in orders, you cannot have a wire out zone selected.

TASK To fill out the Florist area for phoned-in orders:

- 1 Select the Phoned In check box. The Florist area is not enabled until either you select this option or use FTD as the customer.
- 2 From the Wire Service list, select the florist's wire service.

- 3 In the Wire Code field, enter the phoning florist's wire code. If it is an FTD wire code, information about the florist will appear in the field below the Wire Code field. If the florist is not listed in the FTD Directory, you can enter florist contact information in this field.
- 4 In the Florist Contact field, enter the name of the person you talked with at the phoning florist's shop.
- 5 In the Amount field, either enter the amount the phoning florist is providing you, or enter the amount from the product grid once you have entered product information. If you are a Canadian shop, select the US check box if the funds are in U.S. dollars. If the funds are in Canadian dollars, ensure the US check box is cleared.

Filling Out the Product Area

TASK To fill out the Product area:

- 1 In the Product Code column, enter the product code for the product. You can also scan the bar code for the product (if you have configured bar codes for that product). Alternatively, click the Search button (...) to open the Product Search window and search for products. By default, if you perform a Product Search from Order Entry or Point of Sale, Quick Picks are displayed.
- 2 In the Qty column, enter the number of this product that the customer is purchasing.
- 3 Depending on the customer and product configuration, the Amount and Discount columns may automatically populate. If they do not, or if you need to make changes, enter the correct values for the product amount and discount now. The Extension column (product subtotal) will automatically calculate based on the quantity, price, and discount on the product.
- 4 Repeat for any additional products.
- 5 If there is a second choice (typically used in Wire Out orders), enter the product code for it in the Second Choice field or enter a description of acceptable substitutions that can be used when filling the order. You can also click the Search button (...) to perform a Product Search.

Entering Carry Out Orders

Although you can enter carry out orders in both Order Entry and Point of Sale, FTD strongly recommends entering all carry out orders in Point of Sale so you have access to the receipt printer and cash drawer.

Entering Carry Out Orders in Point of Sale

TASK To enter a carry out order in Point of Sale:

- 1 On the FTD Mercury Main Menu, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the Customer area, enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.

NOTE

- In Point of Sale, you can leave the Customer field empty to use the default Point of Sale customer (usually Cash Sales).
- 4 Ensure you have selected a delivery zone (even if the zone is **N/A**).
 - 5 In the **Product** area, enter product information. For more information, see [Filling Out the Product Area](#) on page 9-16.
 - 6 If there is a card message, enter it in the **Card** area. For more information, see [Filling Out the Card Area](#) on page 9-15
 - 7 From the **Occasion** list, select the occasion for the purchase.
 - 8 Click **Complete**. The **Payments** window opens.
 - 9 From the **Referral Code** list, select the marketing method that generated this order (if any).

- 10 In the Payments area, enter payment information. For more information, see [Taking Order Payments](#) on page 9–29.
- 11 Click **Complete** to complete the sale, or click **Save** to save payment information and return to the **Point of Sale** window. Once the sale is complete the customer receipt prints out. If your system is set up to process credit card transactions and the payment used a credit card, or if the payment is on a house account, two additional receipts print with signature lines. The customer should sign the store copy and keep the customer copy.
Invoices, such as the billing invoice and worksheet, will print according to settings in Mercury Administration.

IMPORTANT If the payment was on a credit card and the credit card was declined, neither the invoice nor the receipt will print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment information.

Entering Orders for Pickup

Pickup orders are typically phoned in by customers themselves. If you select a pickup delivery zone, FTD Mercury does not require you to enter the customer's or recipient's address or phone number prior to completing or filing the order. All filed orders, regardless of their delivery zone, use Cash Sales as the default customer if no customer has been selected.

TASK **To enter an order for pickup:**

- 1 On the **FTD Mercury Main Menu**, either click **Order Entry** or **Point of Sale**.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store (only in Order Entry).
- 3 From the **Employee** list, select your employee name.
- 4 In the **Customer** area, fill in customer information. (For more information, see [Filling Out the Customer Area](#) on page 9–14.)
- 5 In the **Delivery** area, fill out the information, making sure you select a pickup delivery zone. (For more information, see [Filling Out the Delivery Area](#) on page 9–14.)
- 6 Fill out the **Card** area. (For more information, see [Filling Out the Card Area](#) on page 9–15.)
- 7 From the **Occasion** list, select the occasion for this order.
- 8 In the **Products** area, enter product information. (For more information, see [Filling Out the Product Area](#) on page 9–16.)
- 9 If there are any additional instructions for the order, enter them in the **Special Instructions** field.
- 10 Click **COD**. The order is marked in FTD Mercury as a C.O.D. order, which you can later locate using **Ticket Search**.

IMPORTANT If the customer is making payment at the time they are placing the order for pickup (that is, they are using a credit card or gift card), do not click COD—click Payment instead and take the payment as you would for other orders. You can still look the order up in Ticket Search using the Pickup criteria.

Locating and Completing Pickup Orders

When the customer arrives to pick up the order, you need to locate the ticket. If you marked the order as C.O.D., you also need to collect payment for the order.

TASK To locate a pickup order and complete it:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**.
- 2 Click the **Lookup** button. The **Ticket Search** window opens.
- 3 Select the **Type** check box and select **Pickup** as the type.
- 4 Ensure all other parameters are cleared and click **Search**.
- 5 From the results list, double-click on the order the customer is picking up. The order opens in **Point of Sale**.
- 6 Click the **Payment** button. The **Payments** window opens.
- 7 If the order was not paid for (in the case of C.O.D. orders), the **Payments** window displays the amount due. Fill out the **Payments** window (for more information, see [Taking Order Payments](#) on page 9-29) and click **Complete**.

Entering Orders for Local Delivery

There are slight differences in entering orders for local delivery depending on whether you are using Point of Sale or Order Entry. Generally, if the customer is present, you should use Point of Sale.

Entering Orders for Local Delivery in Point of Sale

TASK To enter an order for local delivery in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 4 By default, billing address from the customer's information is already displayed. However, if you need to specify an address only for this order, click **Invoice Only** and enter the address.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). You can also use the **Funeral Log** or **Facility Search** buttons to enter information about a recipient at a funeral home or facility. For more information, see [Filling Out the Recipient Area](#) on page 9-14.
- 6 In the **Delivery** area, enter delivery information. For more information, see [Filling Out the Delivery Area](#) on page 9-14.
- 7 In the **Card** area, enter the card message or use abbreviation codes. If there are multiple recipients, click the **Add Recipients** button and add the other recipients. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 8 From the **Occasion** list, select the occasion for the order.
- 9 In the **Products** grid, enter product information. You can perform a **Product Search** by clicking the Search button (...). Make sure you enter the **Amount** and **Discount** (if any); the **Extension** (product subtotal) is updated automatically. If there is a second choice, enter it in the **Second Choice** field. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 10 If you have any additional instructions, enter them in the **Special Instructions** field.
- 11 Click **Payment**. The **Payments** window opens.
- 12 Enter payment information (see [Taking Order Payments](#) on page 9-29 for details) and click **Complete**.

Entering Orders for Local Delivery in Order Entry

TASK To enter an order for local delivery in Order Entry:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 4 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 5 By default, billing address from the customer's information is already displayed. However, if you need to specify an address only for this order, click **Invoice Only** and enter the address.
- 6 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). You can also use the **Funeral Log** or **Facility Search** buttons to enter information about a recipient at a funeral home or facility. For more information, see [Filling Out the Recipient Area](#) on page 9-14.
- 7 In the **Delivery** area, enter delivery information. For more information, see [Filling Out the Delivery Area](#) on page 9-14.
- 8 In the **Card** area, enter the card message or use abbreviation codes. If there are multiple recipients, click the **Add Recipients** button and add the other recipients. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 9 From the **Occasion** list, select the occasion for the order.
- 10 In the **Products** grid, enter product information. You can perform a **Product Search** by clicking the Search button (...). Make sure you enter the **Amount** and **Discount** (if any); the **Extension** (product subtotal) is updated automatically. If there is a second choice, enter it in the **Second Choice** field. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 11 If you have any additional instructions, enter them in the **Special Instructions** field.
- 12 Click **Payment**. The **Payments** window opens.
- 13 Enter payment information (see [Taking Order Payments](#) on page 9-29 for details) and click **Complete**.

Entering Local Deliveries as C.O.D. Orders

Although this is a less common scenario, FTD Mercury also enables you to create a local delivery that is a C.O.D. order. It is substantially the same as entering any other local delivery, but instead of clicking Payment, you click C.O.D. to mark the order as C.O.D. in FTD Mercury. The billing invoice will indicate on the delivery slip that this is a C.O.D. order and instructs the driver to collect the order amount when delivering the order (in cash or by check). When your driver returns to the shop, you need to look up the ticket to complete the order.

Completing C.O.D. Orders when the Driver Returns

TASK To complete a C.O.D. order when your driver returns with the collected money:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 Click **Lookup**. The **Ticket Search** window opens.
- 3 Enter today's date and select **Delivery Date**.
- 4 Select the **Order Type** parameter and select the **C.O.D.** parameter. Ensure all other search parameters are cleared.
- 5 Click **Search**.
- 6 From the results list, double-click on the order you need to complete. The ticket opens in **Point of Sale**.

- 7 Click **Payment**. The **Payments** window opens.
- 8 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9-29. Click **Complete**.

The sale is recorded, and the order will no longer be accessible if you search for C.O.D. orders in Ticket Search; it will, however, be available when you search for completed orders.

Entering Wire Out Orders

Entering Wire Out Orders in Point of Sale

TASK To enter a wire out order in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 4 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). For more information, see [Filling Out the Recipient Area](#) on page 9-14.
- 5 In the **Delivery** area, enter delivery information. Ensure you select a wire out zone from the **Zone** list (this may be **Wire Out** or it may be a zone defined for outgoing wire orders). For more information, see [Filling Out the Delivery Area](#) on page 9-14.
- 6 In the **Card** area, enter the card message or use abbreviation codes. For more information, see [Filling Out the Card Area](#) on page 9-15.
- 7 From the **Occasion** list, select the occasion for the order.
- 8 In the **Florist** area, enter the filling florist information. For more information, see [Filling Out the Florist Area](#) on page 9-15.
- 9 In the **Products** grid, enter product information. Make sure you also enter Second Choice details. For more information, see [Filling Out the Product Area](#) on page 9-16.
- 10 If there are any additional instructions, enter them in the **Special Instructions** area.
- 11 Click **Complete**. The **Payments** window opens.
- 12 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9-29. When you are done, click **Complete**.

Entering Wire Out Orders in Order Entry

TASK To enter a wire out order in Order Entry:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 3 From the **Employee** list, select your employee name.
- 4 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). For more information, see [Filling Out the Recipient Area](#) on page 9-14.
- 6 In the **Delivery** area, enter delivery information. Ensure you select a wire out zone from the **Zone** list (this may be **Wire Out** or it may be a zone defined for outgoing wire orders). For more information, see [Filling Out the Delivery Area](#) on page 9-14.

- 7 In the **Card** area, enter the card message or use abbreviation codes. For more information, see [Filling Out the Card Area](#) on page 9–15.
- 8 From the **Occasion** list, select the occasion for the order.
- 9 In the **Florist** area, enter the filling florist information. For more information, see [Filling Out the Florist Area](#) on page 9–15.
- 10 In the **Products** grid, enter product information. Make sure you also enter Second Choice details. For more information, see [Filling Out the Product Area](#) on page 9–16.
- 11 If there are any additional instructions, enter them in the **Special Instructions** area.
- 12 Click **Complete**. The **Payments** window opens.
- 13 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9–29. When you are done, click **Complete**.

Entering Phoned-Out Orders

Entering Phoned-Out Orders in Point of Sale

TASK To enter a phoned-out order in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9–14.
- 4 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). For more information, see [Filling Out the Recipient Area](#) on page 9–14.
- 5 In the **Delivery** area, enter delivery information. Ensure you select a wire out zone from the **Zone** list (this may be **Wire Out** or it may be a zone defined for outgoing wire orders). For more information, see [Filling Out the Delivery Area](#) on page 9–14.
- 6 In the **Card** area, enter the card message or use abbreviation codes. For more information, see [Filling Out the Card Area](#) on page 9–15.
- 7 From the **Occasion** list, select the occasion for the order.
- 8 In the **Florist** area, click the Phoned Out check box and enter the filling florist information. You should also enter the name of the person you spoke with in the **Florist Contact** field. For more information, see [Filling Out the Florist Area](#) on page 9–15.
- 9 In the **Products** grid, enter product information. Make sure you also enter Second Choice details. For more information, see [Filling Out the Product Area](#) on page 9–16.
- 10 If there are any additional instructions, enter them in the **Special Instructions** area.
- 11 Click **Complete**. The **Payments** window opens.
- 12 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9–29. When you are done, click **Complete**.

Entering Phoned-Out Orders in Order Entry

TASK To enter a phoned-out order in Order Entry:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 4 In the **Customer** area, enter the customer's name, phone number, or credit card number to look up the customer. You can also use the **Search** button (...) to perform a customer search. If this is

- a new customer, when you enter the customer's name, you will be prompted to enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9-14.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). For more information, see [Filling Out the Recipient Area](#) on page 9-14.
 - 6 In the **Delivery** area, enter delivery information. Ensure you select a wire out zone from the **Zone** list (this may be **Wire Out** or it may be a zone defined for outgoing wire orders). For more information, see [Filling Out the Delivery Area](#) on page 9-14.
 - 7 In the **Card** area, enter the card message or use abbreviation codes. For more information, see [Filling Out the Card Area](#) on page 9-15.
 - 8 From the **Occasion** list, select the occasion for the order.
 - 9 In the **Florist** area, click the **Phoned Out** check box and enter the filling florist information. You should also enter the name of the person you spoke with in the **Florist Contact** field. For more information, see [Filling Out the Florist Area](#) on page 9-15.
 - 10 In the **Products** grid, enter product information. Make sure you also enter **Second Choice** details. For more information, see [Filling Out the Product Area](#) on page 9-16.
 - 11 If there are any additional instructions, enter them in the **Special Instructions** area.
 - 12 Click **Complete**. The **Payments** window opens.
 - 13 Fill out the **Payments** window. For more information, see [Taking Order Payments](#) on page 9-29. When you are done, click **Complete**.

Attaching Incoming Orders

Incoming wire orders are charged to the wire service house account. Each wire service customer house account helps you track your incoming wire orders for each wire service.

NOTE You may also access your incoming orders in Point of Sale.

When an incoming order is attached in Order Entry or Point of Sale (that is, opened from Message Center in Order Entry or Point of Sale), the system applies all fees associated with the recipient's delivery zone. So that the order amount is correct, the system reduces the product amount by the total fee amount. This eliminates the need to change the product amount manually to match the Mercury order amount.

The reduction of the product amount is calculated upon attaching the order. If adjustments are made after the order is attached (for example, you change the delivery zone and the delivery fee increases), FTD Mercury automatically makes the adjustments. If you add or subtract to the order and change the dollar amount, you receive a warning message when you save the order:

The total of this ticket is not equal to the total sale amount of the Mercury Order.
Do you want to save?

You can click **Yes** to continue with the new dollar amount, or click **No** to return to the order and make adjustments. For wire reconciliation purposes, it is recommended to maintain the original price of the order by making the appropriate adjustments (for example, if the delivery amount increased, decrease the product amount). You should only change the total amount of the order if you receive a price change message.

If an incoming Mercury message is attached in Order Entry or Point of Sale and the recipient address contained on the Mercury Message cannot be associated with a zone, the default delivery zone is assigned to the order (your default delivery zone is specified in the **Store Settings** screen in Mercury Administration). The fees associated with the default delivery zone are applied to the order and the product amount is recalculated accordingly.

For Canadian shops, when incoming Mercury orders are received from a U.S. florist, FTD Mercury uses the wire service exchange rate defined in Mercury Administration to convert the funds from U.S. dollars to Canadian dollars in Order Entry. Additionally, any florists listed in the CurrencySettings screen in Mercury Administration who have funds in U.S. dollars will also have their orders converted to Canadian dollars using the wire service exchange rate. If the order is from the United States, the order total will be reduced by the GST tax.

Attaching Incoming Orders from Quebec

If you are a florist in Quebec, and you attach an incoming order where FTD Mercury cannot ascertain the location of the sending florist, you will be asked if the sending florist is in Quebec. The appropriate taxes will be applied based on whether the sending florist is from Quebec.

Processing Incoming Wire Orders

TASK To process an incoming wire order:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 In the **Florist** area, click the **Message Center** button. **Message Center** opens.
- 3 The **Message Center** window automatically searches for all messages that require attention. Incoming orders fall into that category. Unattached messages appear in green text. In the results list, double-click on an incoming order. The order opens in **Order Entry**.
- 4 Make any changes necessary in **Order Entry**, such as selecting a different product code, setting the **Time Detail** for the delivery, or updating the card.
- 5 Click **Payment**. The **Payments** window opens. By default, the house account for the wire service is already selected for the payment.
- 6 Click **Complete**.

After you click Complete, invoices print based on your specifications in Mercury Administration. This may include one or more copies of a billing invoice, a worksheet, and/or a trifold card.

NOTE

Processing incoming Flowers All Hours (FAH) and Florists Online (FOL) is essentially the same as any other incoming order. However, these orders are unique in the following ways:

- » Customer accounts are selected automatically. When you open FAH or FOL orders from Message Center in Order Entry, the customer information is selected automatically instead of setting the customer to the FTD wire service account. If the customer does not exist in your database, you are prompted to add the new customer. The customer's credit card information from the Web order is populated automatically in the Payments window. If the customer put the order on a house account, the house account is selected.
- » Order information is found in order notes. The FAH/FOL order information is located in Order Notes, which you can see in the Order Entry window. Order Notes are not printed on the invoice and do not get transmitted over the Mercury Network if the order is sent as an outgoing order. The notes begin with "Incoming Flowers All Hours, Flowers Online order, or Web Order Interface Order," followed by the Mercury number of the order.

Entering Phoned-In Orders

You can enter phoned-in orders from a wire service, so you may keep records of phoned-in orders in your system. Performing this procedure with FTD orders builds the Rec Message List (see [REC Message List \(REC\)](#) on page 4-40) automatically, which should then be sent in at the end of each month. Entering phoned-in orders from non-FTD wire services creates incoming orders with a status of "Phoned."

Using the Order Entry window to enter incoming phone orders is an excellent way of recording orders so you can then print a “Report of Orders Filled” to send to the wire services of which you are a member, to receive credit for your orders.

There are two main scenarios for entering phoned-in orders:

- » [Entering Phoned-In Orders When You Know the Order Amount](#)
- » [Entering Phoned-In Orders Based on Products](#)

Entering Phoned-In Orders When You Know the Order Amount

TASK To enter a phoned-in order when you know how much money the sending florist is providing:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 3 From the **Employee** list, select your employee name.
- 4 In the **Florist** area:
 - a. Click the **Phoned In** check box.
 - b. From the **Wire Service** list, select the wire service of the phoning florist.
 - c. In the **Florist Code** field, enter the phoning florist’s shop code and press **TAB**. If the code is an FTD code, florist information will automatically populate, and the customer will be set to the FTD wire customer.

TIP You can also click the **Search** button (...) to perform a florist search for FTD florists. However, it is extremely likely the sending shop will provide you with their shop code.

- d. In the **Amount** field, enter the order amount provided to you by the sending florist. If you are set up as a Canadian shop, if the sending florist is in the United States, enter this value in U.S. dollars. If the sending florist is also in Canada, enter this value in Canadian dollars.
 - e. In the **Florist Contact** field, enter the name of the person you spoke with at the sending shop.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). (For more information, see [Filling Out the Recipient Area](#) on page 9–14.)
- 6 In the **Delivery** area, enter delivery information. (For more information, see [Filling Out the Delivery Area](#) on page 9–14.)
- 7 In the **Card** area, enter card information. (For more information, see [Filling Out the Card Area](#) on page 9–15.)
- 8 From the **Occasion** list, select the occasion for this order.
- 9 In the **Product** area, a new item has been entered called wire with the value of the **Amount** field less any delivery fees or exchange rates. In the product grid, enter each product for the order. The total of all products should be the same as the value of the **Wire** product. (For more information, see [Filling Out the Product Area](#) on page 9–16.)
- 10 Enter second choice information (if there is any).
- 11 When the total of the products is the same as the **Wire** product, right-click on the **Wire** product and click **Remove**. (You can also change the product code on the Wire line and not have to remove it.)
- 12 Click **Complete**. The Payments window opens. The Wire Service house account is already selected as the customer with the house account as the payment type. From the Referral Code list, select the referral code, if any.
- 13 Click **Complete**.

Entering Phoned-In Orders Based on Products

TASK To enter a phoned-in order based on products the sending florist is ordering:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 3 From the **Employee** list, select your employee name.
- 4 In the **Florist** area:
 - a. Click the **Phoned In** check box.
 - b. From the **Wire Service** list, select the wire service of the phoning florist.
 - c. In the **Florist Code** field, enter the phoning florist's shop code and press **TAB**. If the code is an FTD code, florist information will automatically populate, and the customer will be set to the FTD wire customer.

TIP You can also click the **Search** button (...) to perform a florist search for FTD florists. However, it is extremely likely the sending shop will provide you with their shop code.

- d. In the **Florist Contact** field, enter the name of the person you spoke with at the sending shop.
- 5 In the **Recipient** area, enter recipient information (you can also use abbreviation codes). (For more information, see [Filling Out the Recipient Area](#) on page 9–14.)
- 6 In the **Delivery** area, enter delivery information. (For more information, see [Filling Out the Delivery Area](#) on page 9–14.)
- 7 In the **Card** area, enter card information. (For more information, see [Filling Out the Card Area](#) on page 9–15.)
- 8 From the **Occasion** list, select the occasion for this order.
- 9 In the **Products** area, enter the product(s) being ordered. Enter any second choice information as well. (For more information, see [Filling Out the Product Area](#) on page 9–16.)
- 10 The **Order Totals** area at the bottom right of the window shows the total for the order. Enter this amount in the **Amount** field in the **Florist** area.

NOTE If you are set up as a Canadian shop, if the sending florist is in the United States, the value of both the **OE Amount** field and the **Amount** field will be in U.S. dollars. FTD Mercury will display a U.S. indicator to inform you the funds are in U.S. dollars.

- 11 Click **Complete**. The **Payments** window opens.
- 12 In the **Payments** window, the wire service house account is already selected as the customer with the house account as the payment type. From the **Referral Code** list, select the marketing method (if any) that generated this order.
- 13 Click **Complete**.

Creating a Wire Out Order from an Incoming Florists Online or Flowers All Hours Order

You can create a wire out order from an incoming FOL/FAH message order. When you attach an incoming FOL/FAH order, the customer's account information is updated if the customer is in the database, and the credit card or house account information populates the payment window. The order then is considered a local delivery order. At this point you can change the delivery zone to a wire out zone, and enter the filling florist information. If the address entered is defined in a wire out map zone, this zone will automatically be populated.

If you send an FOL/FAH order to another florist, you lose the ability to view the incoming FOL/FAH wire order from Order Entry. To view the original FOL/FAH wire order information, click the **Order Notes** button in Order Entry. All of the information from the incoming order is copied into Order Notes.

TASK To create a wire out order from an incoming FOL or FAH order:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**.
- 2 If you are configured as a multi-store environment, from the **Store Name** list, select your store.
- 3 From the **Employee** list, select your employee name.
- 4 Click **Message Center**. The **Message Center** opens.
- 5 Enter search criteria to locate the incoming message and click **Search**.
- 6 From the list of messages, double-click on the incoming FOL or FAH order. The order is attached and opens in **Order Entry**.
- 7 Fill out the order as you normally would, ensuring you change the delivery zone to **Wire Out** (or to a delivery zone of **Wire Out** type).
- 8 In the **Florist** area, enter the filling florist information. For more information, see [Filling Out the Florist Area](#) on page 9-15.
- 9 If there are any additional instructions, enter them in the **Special Instructions** area.
- 10 Click **Complete**. The **Payments** window opens. The credit card information from the customer should be populated for you. If the customer placed the order on a house account, the house account should already be selected. For more information, see [Taking Order Payments](#) on page 9-29.
- 11 Click **Complete**

Order Entry Wire Product

When you enter an amount in the **Phoned In Order** window and the amount does not equal the amount currently in the product grid (including delivery charges and taxes) in **Order Entry**, an item called **Wire** is added to the product grid. Depending on whether the amount entered in the **Amount** field in the **Florist** area is more or less than the amount in the product grid, the **Wire** item will be positive or negative. You need to adjust the product amount(s) until you eliminate the difference caused by the **Wire** item. You can then remove the **Wire** item from the product grid and the amount from the **Amount** field in the **Florist** area will equal the amount in **Order Entry**, including delivery charges and applicable taxes.

If you have only one item in the phoned-in order, you can replace the product code of the **Wire** item with the correct product code for the item (for example, arr for Arrangement). The amount for the item should be the same as the amount of the **Wire** item.

Whenever possible, you should ensure the correct delivery zone is selected before changing the value of the **Wire** item (so that, if configured, FTD Mercury can automatically insert the delivery charge and reduce the product amount of the **Wire** item).

Figure 9-5: The Wire Item in the Order Entry Window

(-)	Product Code	Qty	Description	Amount	Discount	Extension
<input type="checkbox"/>	Wire	1	Wire	\$ 59.92	0%/\$0.00	\$ 59.92
<input type="checkbox"/>	DELIV	1	Delivery Charge	\$ 8.00	0%/\$0.00	\$ 8.00
<input type="checkbox"/>		1		\$ 0.00	0%/\$0.00	\$ 0.00

IMPORTANT If you change the **Amount** in the **Phoned In Order** window a second time, the **Wire** product will be updated (or will be created if the **Wire** product does not exist in the product grid).

Canadian Tax Calculations for Incoming Wire and Phone Orders

NOTE This section applies only to Canadian shops.

FTD Mercury is designed to handle the intricacies of applying the correct Canadian taxation rules for incoming wire and phone orders based on the tax codes you configured. For detailed instructions on how to configure your system as Canadian (if it was not set up initially as a Canadian system), refer to [Canadian Configurations](#) on page C-1. When your system is configured as described in that appendix, FTD Mercury processes taxes for incoming wire and phone orders as follows:

Table 9-9: Canadian Tax Application for Incoming Wire and Phone Orders

Sending Florist Location	Receiving Florist Location	Federal Tax Applied?	Provincial Tax Applied?
U.S.	Any Province Other Than Quebec	Yes	No
U.S.	Quebec	Yes	Yes
Any Province Other Than Quebec	The Same Province as the Sending Florist	No	No
Any Province Other Than Quebec	Quebec	No	Yes
Quebec	Quebec	No	Yes
Any Canadian Province	U.S.	No	No
Quebec	Any Province Other Than Quebec	No	No

FTD Mercury determines your store location from the **Province** list in the **Store Settings** screen of Mercury Administration. Ensure this value is correct, or all of your taxation rules will be incorrect.

Product Fill Values

When incoming orders are received from a florist outside of Canada, FTD Mercury automatically computes the fill value of the product based on the order total received in Canadian funds and the province conversion chart multiplier (set in the **WireServices** screen in FTD Administration). The order fill value is then reduced by the fees applied to arrive at the product fill value. Once this fill value has been computed, FTD Mercury appends it to the product description in Order Entry, and prints it on the invoice. However, the fill value does not print on the delivery slip or the delivery routing manifest.

Fill values are calculated for all orders received from outside of Canada, regardless of whether the order is received in Canadian funds. FTD Mercury determines whether the order is from out of country by reading the state/province field in the Florist Directory and from the **CurrencySettings** screen in Mercury Administration. If FTD Mercury cannot determine if the sending florist is from out of the country, it asks you if the florist is in Canada.

Filing Incomplete Orders

There may be times you need to file an order to complete later. Usually, this is because you need to move on to another order before you have all the information for the order you are currently viewing, need to free up the computer, etc. In any case, you need to stop working on an incomplete order, and intend to go back to it again in the future.

IMPORTANT You should not file orders for pickup; instead, select a pickup zone for orders that you have payment information for (via credit card or house account payment), or create a C.O.D. order for pickup orders that will be paid for when the customer picks up the order.

If you attempt to file an order which has both a customer and recipient, and the delivery zone is blank, you are prompted to enter a delivery zone prior to filing. If the order is missing either the customer or recipient, the delivery zone is automatically set to N/A.

IMPORTANT You cannot file an order in Order Entry if you have not entered a customer. The File button is disabled until that point.

When you file an order, an invoice will print with the word FILED.

TASK To file an order:

- 1 While in **Order Entry** or **Point of Sale**, click **File**.
- 2 When asked if you want to print an invoice, click **Yes** to print the invoice with as much information as you have already entered, or click **No** to continue without printing. The invoice will include the time the order was entered, and the word FILED.

NOTE Recipient information is saved only if you have specified a customer for the order.

Locating Filed Orders

TASK To find an order you have filed:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. If you are in **Order Entry** or **Point of Sale**, click **Lookup**.
- 2 Select the **Order Status** check box and select **Filed** as the status.
- 3 Ensure all other check boxes are cleared and click **Search**.
- 4 In the results list, double-click on the ticket you want to open. **Order Entry** or **Point of Sale** opens (depending on where the order was originally entered).

Once you have located the ticket, you can continue working on it as you would any other ticket.

Deleting Previously Filed Orders

TASK To delete a previously filed order:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket**. If you are in **Order Entry** or **Point of Sale**, click **Lookup**.
- 2 Select the **Order Status** check box and select **Filed** as the status.
- 3 Ensure all other check boxes are cleared and click **Search**.
- 4 In the results list, double-click on the ticket you want to open. **Order Entry** or **Point of Sale** opens (depending on where the order was originally entered).
- 5 Click **Delete Order**.
- 6 Confirm that you want to delete the order.

C.O.D. Orders

In FTD Mercury, cash on delivery (C.O.D.) encompasses more than just a cash payment when something is delivered. Orders that require payment on delivery (either cash or check) or payment on pickup (by cash, check, or credit card) are designated as C.O.D. orders. The important point to remember is that payment was not provided at the time the order was placed, and you will need to collect it when the order is delivered or picked up.

C.O.D. orders are useful because some customers want to wait to pay you until the goods are ready. One good example is for prom-related items (corsages and boutonnieres). High school students may need to place the order several weeks or months ahead of time, but want to pay when they pick up the item closer to the prom. Another possibility is someone who orders an arrangement over the phone during the day and wants to pick it up at the end of the day and pay in cash. You want to accept the order, but want to make sure it gets paid for when the customer picks it up.

There is, of course, some risk in accepting C.O.D. orders: you do not have payment before you design and create (and possibly deliver) the order.

When to Use C.O.D. Orders

You should use C.O.D. for any local orders (delivery or pickup) where you do not receive payment prior to creating the order. If you get a customer's credit card number, accept their cash or check, or charge the order to a house account, do not use C.O.D.

IMPORTANT If an order has more than one ticket, you cannot use a C.O.D. order. You must create new orders for each additional ticket.

When creating C.O.D. orders, you must use a pickup or local delivery zone; if you select a wire out zone, the C.O.D. button is disabled.

See Also

[Entering Orders for Pickup on page 9-17](#)

[Entering Local Deliveries as C.O.D. Orders on page 9-19](#)

Taking Order Payments

After a customer has placed their order, you need to take their payment. Regardless of the order type, the process is the same.

In Point of Sale

TASK To take an order payment in Point of Sale:

- 1 With the order open in Point of Sale, click **Payment**. The **Payments** window opens.
- 2 From the **Referral Code** list, select the referral code for the order.
- 3 In the **Payments** grid, in the **Type** column, select the payment type.
 - » For credit card transactions:
 - a. Swipe the credit card, or in the **Account Number** column, enter the account or card number.
 - b. Fill in the **Exp Date** and **Name** columns.
 - c. Enter the amount you are tendering in the **Tendered** column.
 - » For cash, check, and gift certificate transactions:

- a. In the **Tendered** column, enter the amount tendered.
 - b. For Canadian Point of Sale systems, select whether the payment currency is in U.S. or Canadian funds. If you select U.S. funds, the amount tendered will be converted to Canadian dollars using the local exchange rate in Mercury Administration and the indicator will change to Canadian funds.
 - c. If change is due to the customer, the **Change Due** field displays the amount of change due to the customer. Customers cannot receive cash back on credit card or house charge transactions.
- » For gift card payments:
- a. Swipe the gift card or enter the gift card number in the **Account** field.
 - b. If the card is active, a window opens displaying the balance and expiration date. Close this window.
 - c. If there is sufficient balance on the gift card for the payment, the row in the payment grid will display the full amount of the transaction in the **Gift Card** row. If there is not sufficient balance, the amount from the gift card will display in the **Tendered** column in the **Gift Card** row. You will need to add an additional payment for the transaction.
- 4 Click **Complete** to complete the sale, or click **Save** to save the payment information and return to the Point of Sale window. Once the sale is complete, a customer receipt prints out. If you are processing a credit card or a payment from a house account, two additional receipts print out with signature lines. The customer should sign the store copy and keep the other copy.

IMPORTANT If the credit card was declined, neither the invoice nor the receipt will print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment method.

You can also click Reprint Receipt to print another copy of the receipt, or click New Order to return to the Point of Sale window.

In Order Entry

- 1 With the order open in **Order Entry**, click **Payment**. The **Payments** window opens.
- 2 From the **Referral Code** list, select the referral code for the order.
- 3 In the **Payments** grid, in the **Type** column, select the payment type.
 - » For credit card transactions:
 - a. In the **Account Number** column, enter the account or card number.
 - b. Fill in the **Exp Date** and **Name** columns.
 - c. Enter the amount you are tendering in the **Amount** column.
 - d. Select the appropriate value from the **Cardholder Present** list.
 - » For gift card payments:
 - a. Enter the gift card number in the **Account** field.
 - b. If the card is active, a window opens displaying the balance and expiration date. Close this window.
 - c. If there is sufficient balance on the gift card for the payment, the row in the payment grid will display the full amount of the transaction in the **Gift Card** row. If there is not sufficient balance, the amount from the gift card will display in the **Amount** column in the **Gift Card** row. You will need to add an additional payment for the transaction.
- 4 Click **Complete** to complete the sale, or click **Save** to save the payment information and return to the **Order Entry** window.

IMPORTANT If the credit card was declined, the invoice will not print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment method.

Debit Card Payments

In both the United States and Canada, a payment type called Debit is available. For U.S. shops, FTD Mercury does not authorize debit cards, but you can use this payment type for externally authorized payments (through a debit authorization device). You can then enter the account/card number and the authorization number so these payments are tracked in reports.

For Canadian shops, if you are using Point of Sale and are licensed for debit cards, FTD Mercury does the processing. For more information, see [Debit Cards](#) on page D-1.

Because FTD Mercury does not attempt to authorize this payment type, you can also use it for other previously authorized or settled payments. These will also appear in the reports as debit type payments.

Redeeming Gift Certificates

TASK To redeem a gift certificate in **Order Entry** or **Point of Sale**:

- 1 Take the customer's order as normal.
- 2 On the **Payment** screen, tender the sale as usual. In the **Payment Type** list, select **Gift Certificate**.

Redeeming Coupons

When a customer presents a coupon for redemption, you handle it just like any other product in FTD Mercury. You can either enter the product code manually, or select the coupon by performing a product search. Additionally, if you are using Point of Sale, you can scan the bar code on the coupon (if present), as long as the coupon bar code was associated with the coupon when the coupon was created as a product.

IMPORTANT Coupons are automatically interpreted as a negative value in the **Point of Sale and Order Entry** windows; you do not need to select the (-) column to indicate a negative value.

Payments Window

The **Payments** window allows you to receive payment for an order. To access this window, click **Payment** or **Complete** in the **Order Entry** or **Point of Sale** window.

Figure 9-6: Payments Window

If you have configured user questions to ask in this payment window, these will be displayed in the Marketing section. From the **Referral Code** list, select the marketing method that generated this order (if any).

In the **Payments** area, provide information about this payment. Customers can use multiple payment types (for example, a gift certificate for part of the order and cash for the rest); enter each payment type on its own line. The columns here are:

Table 9-10: Payment Area Columns

Column	Description
Type	Select the payment type for this order.
Account Number	If you selected Credit Card as the payment type, in this field, enter the account or card number (you can also swipe the card).
Exp Date	Enter the expiration date for the credit card.
Name	Enter the name of the cardholder.
Approval	Once the credit card is sent for processing, the approval code appears in this field.
Amount	This column only appears in Order Entry. Enter the amount of the payment.
Tendered	This column only appears for Point of Sale systems. Enter the amount of money tendered for this sale.
Exchg	This column is included for Canadian Point of Sale systems. Select whether the funds you are tendering are in Canadian or U.S. funds. If they are in U.S. funds, FTD Mercury will automatically convert them to Canadian funds using the local exchange rate defined in the Store Settings screen in Mercury Administration.

If a credit card is used for payment, from the **Cardholder Present** list, select whether the cardholder was present for the transaction, and if not, the circumstances if they were not present.

For Point of Sale transactions, the order total and change due appear in large type at the bottom of the screen.

When you click **Complete**, the events that happen depend on your FTD Mercury configuration, the payment type, whether the order was a wire out order, and whether you are using **Order Entry** or **Point of Sale**.

Order Entry

The following scenarios can occur when you click **Complete** in the **Payments** window when using Order Entry:

Table 9-11: Order Entry Payment Scenarios

Order Type	Payment Type	Description
Wire Out	Non-Credit Card, Non-Gift Card	FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer.
Wire Out	Credit Card	FTD Mercury sends out for credit authorization. You must wait for authorization. Once you receive authorization, FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer.
Wire Out	Gift Card	FTD Mercury checks for gift card balance. If there is sufficient balance, the transaction is authorized and FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer.
Non-Wire Out	Non-Credit Card, Non-Gift Card	If your system is configured to print an order entry invoice for the delivery zone, the invoice prints on your configured printer.
Non-Wire Out	Credit Card	FTD Mercury sends out for credit authorization. You must wait for authorization. Once you receive authorization, if your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the configured printer.
Non-Wire Out	Gift Card	FTD Mercury checks for gift card balance. If there is sufficient balance, if your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the configured printer.

Point of Sale

The following scenarios can occur when you click **Complete** in the **Payments** window when using Point of Sale:

Table 9-12: Point of Sale Payment Scenarios

Order Type	Payment Type	Description
Wire Out	Non-Credit Card, Non-House Account, and Non-Gift Card	FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer. Your receipt printer prints a customer copy of the receipt and a store copy of the receipt.

Table 9-12: Point of Sale Payment Scenarios (cont.)

Order Type	Payment Type	Description
Wire Out	Gift Card	FTD Mercury checks for gift card balance. If there is sufficient balance, the transaction is authorized and FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer.
Wire Out	Credit Card	FTD Mercury sends out for credit authorization. You must wait for authorization. Once you receive authorization, FTD Mercury sends the order to the Host Computer. When the Host Computer receives it, FTD Mercury prints a verified copy of the order on your Mercury printer. If the credit card is declined, you are informed with an on-screen message. You can then enter a different credit card or an alternative form of payment.
Wire Out	House Account	Your receipt printer prints a customer copy of the receipt and a store copy of the receipt, plus a store copy of a signature receipt and a customer copy of a signature receipt.
Non-Wire Out	Non-Credit Card, Non-House Account, and Non-Gift Card	If your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the configured printer.
Non-Wire Out	Gift Card	FTD Mercury checks for gift card balance. If there is sufficient balance, the transaction is authorized. If your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the configured printer.
Non-Wire Out	Credit Card	FTD Mercury sends out for credit authorization. You must wait for authorization. Once you receive authorization, if your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the Mercury printer. If the credit card is declined, you are informed with an on-screen message. You can then enter a different credit card or an alternative form of payment.
Non-Wire Out	House Account	Your receipt printer prints a customer copy of the receipt and a store copy of the receipt, plus a store copy of a signature receipt and a customer copy of a signature receipt. If your system is configured to print an order entry invoice for the delivery zone, the invoice prints on the Mercury printer.

Transferring Orders to Other Stores

If you are configured as a multi-store environment, you can transfer orders to other stores. You must have enabled the Store Transfer feature in Mercury Administration. (For more information, see [StoreTransfer Screen](#) on page 24–22.)

When you transfer an order to another store, any invoices, worksheets, and cards print at the store to which you transferred the order on the configured printers for that store. For financial purposes, the payment amount is split between stores based on configurations in Mercury Administration.

TASK To transfer an order to another store:

- 1 Take the order as normal in the **Order Entry** or **Point of Sale** window.
- 2 In the **Delivery** area, select the store you want to transfer the order to from the **Transfer To** list.
- 3 Click **Payment**. The **Payments** window opens. Take the payment as you normally would (see [Taking Order Payments](#) on page 9–29). Click **Complete**.

Once the order is complete, invoices print at the store to which you transferred the order. If you took the order on a Point of Sale station, the appropriate receipts are printed.

Using Abbreviation Codes in Orders

You can use abbreviation codes in orders to allow you to quickly enter common information for recipients and card messages. For example, if you have a commonly entered card message (such as We Miss You So Much!), you can create an abbreviation code (such as **wmusm**) that will be replaced by the text in a card message. Additionally, you can tie occasions to card messages, automatically selecting the occasion from the Occasion list when you enter the abbreviation code for the card message.

You can also use abbreviation codes to fill in recipient information. This can be a tremendous timesaver if you have a commonly used recipient (such as a hospital or funeral home).\

TASK To use an abbreviation code for a card message:

- 1 In **Order Entry** or **Point of Sale**, in the **Card** area, enter the abbreviation code in the format `\code` (where code is your abbreviation code). For example, enter `\hb` (for Happy Birthday!).
- 2 Press the **TAB** key. The abbreviation code is automatically replaced with the value for the abbreviation code (for example, `\hb` is replaced with Happy Birthday!).

TASK To use an abbreviation code for a recipient address:

- 1 In **Order Entry** or **Point of Sale**, in the Recipient area, enter the abbreviation code in the Company Name, Address, City, ZIP Code, or Phone field. The code should be in the format in `\code` (where code is your abbreviation code).
- 2 Press the **TAB** key. The abbreviation code is replaced with the value for the address.

For more information, see [Abbreviation Codes Screen](#) on page 24–64.

Caller ID and Orders

As an add-on feature, FTD Mercury is capable of integrating with caller ID functionality. This allows you to see caller ID information on your FTD Mercury system, click OK, and automatically perform a customer lookup for the calling customer based on phone number. This can significantly increase your customer service level, as you can already have the customer information up in the Order Entry window prior to picking up the phone.

There are three main scenarios when using caller ID as pertains to customer lookup in FTD Mercury:

Table 9-13: Customer Lookup from Caller ID

Scenario	Result
Phone number only matches a single customer	The customer's name and information is automatically populated in the customer area.

Table 9-13: Customer Lookup from Caller ID (cont.)

Scenario	Result
Phone number matches multiple customers	The Customer Search window opens and displays all customers who match that phone number. Highlight the customer you want to use and click Select (usually, you have to do so after you answer the phone and verify the customer's name).
Phone number matches does not match a customer	The Customer Search window opens and you are informed that the customer was not found. You are then asked if you want to create a new customer (which will open the Customer Detail Information window).

For more information about signing up for Caller ID functionality in FTD Mercury, contact FTD Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com.

Gift Cards

Gift cards are plastic cards printed with your store information on which you store value for a customer or recipient. Gift cards have many benefits. For example, gift cards give your customers more flexibility when choosing a gift because a gift card allows the recipient to select their favorite products. Gift cards also keep business in your shop since they can only be redeemed in your store, or in your company's stores if you are a multi-store business (as long as your stores use the same credentials for processing credit cards over the Internet). Gift cards also offer you a convenient way to provide store credit as a promotion or when processing a return. For example, you could give any customer who comes in during October a free \$5.00 gift card. Finally, you can make gift cards available as an impulse purchase at the counter to help increase the total value of a sale.

Gift cards offer you another advertising channel since, at a minimum, gift cards contain your store's contact information. For an additional fee, you can have FTD customize the front of the gift card with your store or company artwork.

Although similar to a gift certificate, gift cards are more convenient for you to manage. For instance, gift cards are an FTD product (**Gift Card), so you do not need to add them in Product Entry. You can also track gift card use electronically.

TIP

For more information about the FTD Gift Card program, contact FTD Technology Sales at 1-800-767-3222, or email TechSales@FTDi.com.

Getting Ready to Sell and Redeem Gift Cards

The following are the setups that you must complete before using gift cards.

- » You must be licensed to participate in the FTD Gift Card program. When you sign up to participate in the FTD Gift Card program, you will receive a General message from FTD that enabled you to sell and redeem gift cards.
- » Gift card expiration and balances are checked over the Internet in the same way that credit cards are authorized. Before you can use gift cards, you must be set up to process credit cards over the Internet. If you are multi-store business and all your stores use the same credit card processing setups, gift cards purchased at any of your stores will be redeemable at all stores.
- » Gift cards can be sold and reloaded only in Point of Sale. You must have a valid Point of Sale license in order to sell and add value to gift cards.

By default, FTD gift cards do not expire. You can set a valid period (months until expiration) for FTD gift cards in Mercury Administration.

Gift Cards Sales & Redemption

In the Point of Sale window, you can sell a gift card or add value to a gift card. Gift card sales and reloads are not allowed in the Order Entry window.

NOTE Gift cards can be sold as part of local, pick up, pool, and carry out orders. However, gift cards cannot be sold when the order is a wire out order or when transferring the order to another store.

FTD Mercury X includes a new payment type for gift cards so that you can redeem FTD gift cards that have been activated in your store. You can accept gift cards as payments in the Order Entry and Point of Sale windows. When a customer presents a gift card as payment, you will scan it or enter the gift card number. The system will then verify that the card has been activated for your store and inform you of the value available on the card. After the card has been used for payment, any remaining value stays on the card (can't be given as change).

You can perform the following tasks using gift cards:

- » [Selling New Gift Cards](#)
- » [Adding Value to Gift Cards](#)
- » [Refunding the Purchase of a Gift Card](#)
- » [Accepting Gift Card Payments](#)
- » [Cancelling or Refunding Orders Paid for with Gift Cards](#)
- » [Copying an Order with a Gift Card Payment](#)
- » [Issuing Store Credit with Gift Cards](#)

Selling New Gift Cards

Selling gift cards is essentially the same as selling any other product in your FTD Mercury database, except that when you sell a gift card, you activate the gift card with the value of the purchase. The new gift card is valid from the date of the sale for the expiration period set in Mercury Administration.

TASK **To sell a gift card:**

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 From the **Employee** list, select your employee name.
- 3 In the Customer area, enter the customer's information. For more information, see [Filling Out the Customer Area](#) on page 9–14.

NOTE In Point of Sale, you can leave the Customer field empty to use the default Point of Sale customer (usually Cash Sales).

- 4 Ensure you have selected a delivery zone (even if the zone is **N/A**).
- 5 Fill in the **Products** area:
 - a. In the **Product Code** column, enter ****Gift Card**, or swipe the gift card being purchased. The **Description** field will show the number of the gift card.
 - b. In the **Amount** field, enter the value to be placed on the gift card. The sale price without extension is the value that will be on the gift card when it is activated.
 - c. If you are offering a discount on the gift card, or giving it away free as a promotion, enter a percentage in the **Discount** field. For example, if you want to give customers free \$5.00 gift cards, enter \$5.00 in the Amount field and 100% in the Discount field.
- 6 From the **Occasion** list, select the occasion for the purchase.
- 7 Click **Complete**. The **Payments** window opens.

- 8 In the Payments area, enter payment information. For more information, see [Taking Order Payments](#) on page 9–29.

IMPORTANT You cannot use a gift card to pay for a gift card.

- 9 Click **Complete** to complete the sale, or click **Save** to save payment information and return to the **Point of Sale** window. Once the sale is complete the customer receipt prints out. If your system is set up to process credit card transactions and the payment used a credit card, or if the payment is on a house account, two additional receipts print with signature lines. The customer should sign the store copy and keep the customer copy.
Invoices, such as the billing invoice and worksheet, will print according to settings in Mercury Administration.

IMPORTANT If the payment was on a credit card and the credit card was declined, neither the invoice nor the receipt will print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment information.

Adding Value to Gift Cards

You can add value to unexpired gift cards. The reloaded gift card is valid from the date of the reload for the expiration period set in Mercury Administration.

TASK **To add value to a gift card:**

- 1 On the **FTD Mercury Main Menu**, click Point of Sale. The **Point of Sale** window opens.
- 2 Swipe the gift card that you are reloading. The **Description** field (in the **Products** area) will show the number of the gift card. If the gift card is active, a message will pop up with the gift card balance and expiration date. When you see the message, click **OK**. If the gift card is expired, a message will pop up stating that the gift card is expired. You cannot add value to an expired gift card.
- 3 In the **Amount** field, enter the value to be placed on the gift card. The sale price without extension is the value that will be loaded on the gift card.
- 4 If you are offering a discount on the gift card, enter a percentage in the **Discount** field.
- 5 Click **Complete**. The **Payments** window opens.
- 6 In the Payments area, enter payment information. For more information, see [Taking Order Payments](#) on page 9–29.

IMPORTANT You cannot use a gift card to pay for a gift card.

- 7 Click **Complete** to complete the sale, or click **Save** to save payment information and return to the **Point of Sale** window. Once the sale is complete the customer receipt prints out. If your system is set up to process credit card transactions and the payment used a credit card, or if the payment is on a house account, two additional receipts print with signature lines. The customer should sign the store copy and keep the customer copy.
Invoices, such as the billing invoice and worksheet, will print according to settings in Mercury Administration.

IMPORTANT If the payment was on a credit card and the credit card was declined, neither the invoice nor the receipt will print. Instead, you will receive an on-screen message letting you know and allowing you to enter a different credit card or payment information.

Refunding the Purchase of a Gift Card

You can issue a refund for the purchase of a gift card as long as the gift card has not expired and the balance on the gift card is equal to or greater than the value that was loaded on the gift card at the time of the purchase. When you refund the purchase of a gift card, the value that was refunded is removed from the gift card.

To refund the purchase of a gift card, you must cancel the order in the Point of Sale window. One-Click refunds are not available for orders in which gift cards were purchased.

Accepting Gift Card Payments

You can accept gift cards as payment for all types of orders in the Order Entry and Point of Sale windows. If a sale contains a gift card and another card type payment, such as a credit or debit card, the gift card will be processed first.

TASK To accept a gift card payment in the Order Entry window:

- 1 Fill out the order as you normally would. For more information, see [Entering Orders](#) on page 9-12.
- 2 When you are finished filling out the order, click **Complete**. The **Payments** window opens.
- 3 Swipe the gift card or click the arrow in the **Type** column and select Gift Card, then enter the gift card number. If the gift card is active, a message will pop up with the gift card balance and expiration date. If the gift card is expired, a message will pop up stating that the gift card is expired. You cannot redeem an expired gift card.

NOTE

Gift cards can only be redeemed in the store in which they were purchased. Gift cards that have been activated in another store will appear as inactive in your store. (unless both stores use the same credentials for processing credit cards over the Internet).

- 4 Click **OK**. If the value on the gift card exceeds the Balance Due, when you click Complete, the balance due will be deducted from the value on the card. If the value on the card is less than the Amount Due, you will need to select another payment type to complete the payment. If you want to use less value from the gift card, you can enter a different amount for the gift card and enter an additional payment type.
- 5 Click **Complete**. When the system removes the value from the gift card, the Approval column will show that the gift card was approved. If the value deducted from the gift card was less than the value on the gift card, the remaining value will be retained on the gift card. If another card type payment, such as a credit or debit card, was used on the sale, and this payment type is not approved, no value will be deducted from the gift card. This is done in the event that the customer decides not to use the gift card.

For more information on taking payments, see [Taking Order Payments](#) on page 9-29.

TASK To accept a gift card payment in the Point of Sale window:

- 1 Fill out the order as you normally would. For more information, see [Entering Orders](#) on page 9-12.
- 2 When you are finished filling out the order, click **Complete**. The **Payments** window opens.
- 3 Swipe the gift card or click the arrow in the **Type** column and select Gift Card, then enter the gift card number. If the gift card is active, a message will pop up with the gift card balance and expiration date. If the gift card is expired, a message will pop up stating that the gift card is expired. You cannot redeem an expired gift card.

NOTE

Gift cards can only be redeemed in the store in which they were purchased. Gift cards that have been activated in another store will appear as inactive in your store (unless your stores use the same credentials for processing credit cards over the Internet).

- 4 Click **OK**. The value on the card will be applied as the amount Tendered. If the value on the gift card exceeds the Amount Paid, when you click Complete, the Amount Paid will be deducted from the value on the card. If the value on the card is less than the Amount Paid, you will need to select another payment type to complete the payment. If you want to use less value from the gift card, you can enter a different amount for the gift card and enter an additional payment type.
- 5 Click **Complete**. When the system removes the value from the gift card, the Approval column will show that the gift card was approved. If the value deducted from the gift card was less than the value on the gift card, the remaining value will be retained on the gift card. If another card type payment, such as a credit or debit card, was used on the sale, and this payment type is not approved, no value will be deducted from the gift card. This is done in the event that the customer decides not to use the gift card.

For more information on taking payments, see [Taking Order Payments](#) on page 9–29.

Cancelling or Refunding Orders Paid for with Gift Cards

You can issue a refund for an order that was paid for in part or in full by a gift card. When an order is cancelled where payment was made with a gift card, the refund value is returned to the gift card as long as the gift card has not expired.

You can issue a refund in the Order Entry or Point of Sale windows using either One-Click refunds or by cancelling the order.

Copying an Order with a Gift Card Payment

You can copy an order that was paid for in part or in full with a gift card. When you copy the order, the gift card information becomes part of the payment for the new order. When you complete the new order, the system will check the gift card balance and redeem the gift card. You will not need to swipe the gift card.

Issuing Store Credit with Gift Cards

FTD gift cards allow you to issue credit for returns as value loaded on an active FTD gift card. FTD gift cards can be redeemed only in the store in which they are activated; therefore, putting refunds on a gift card increases the chance that the customer will return to your store. If a gift card was used for the purchase that you are refunding, you can easily return the value to the gift card. However, if the customer did not use a gift card for the original purchase, you can still place the refund value on a gift card by selling a new gift card for the value of the returned products.

IMPORTANT Refunding store credit on a gift card must be done in the Point of Sale window because you will need to activate the gift card in order to place the refund value on it.

- TASK** **To place refund value on an FTD gift card using One-Click refunds:**
- 1 In the Point of Sale window, click **Lookup**. The Ticket Search window opens.
 - 2 Enter search criteria to locate the ticket you are refunding and click **Search**.
 - 3 Right-click in the order you are refunding and select **Refund Sale**. The **Point of Sale** window will display with the product marked as a refund.
 - 4 Swipe the gift card being used for the refund. The **Description** field will show the number of the gift card.
 - 5 In the **Amount** field, enter the amount of the refund.
 - 6 Click **Payment**. The **Refund** window will appear.
 - 7 Click **Complete**. The refund value will be loaded on the gift card.

Gift Card Reporting

You can get information on your gift card sales and redemptions from the Gift Card Activity window, Mercury Accounting Balance Wizard, and from the following Business Reports.

- » Business Snapshot Report--Gift card payments appear in the Sales Analysis tab under the Sales Pay Method heading. For more information, see [Business Snapshot Report](#) on page 19-11.
- » Payment Type Totals Report--The number of gift card payments and the total amount of gift card payments appear to the right of Gift Certificates. For more information, see [Payment Type Totals Report](#) on page 19-33.
- » Sales Summary Report--The Gift Certificate/Card Summary sections in the Order Entry, Point of Sale and Total Sales sections contain details on gift card sales and redemptions for the reporting period. For more information, see [Sales Summary Report](#) on page 19-50.

Viewing Gift Card Activity

The Gift Card Activity window shows the gift cards that are active for your store.

TASK

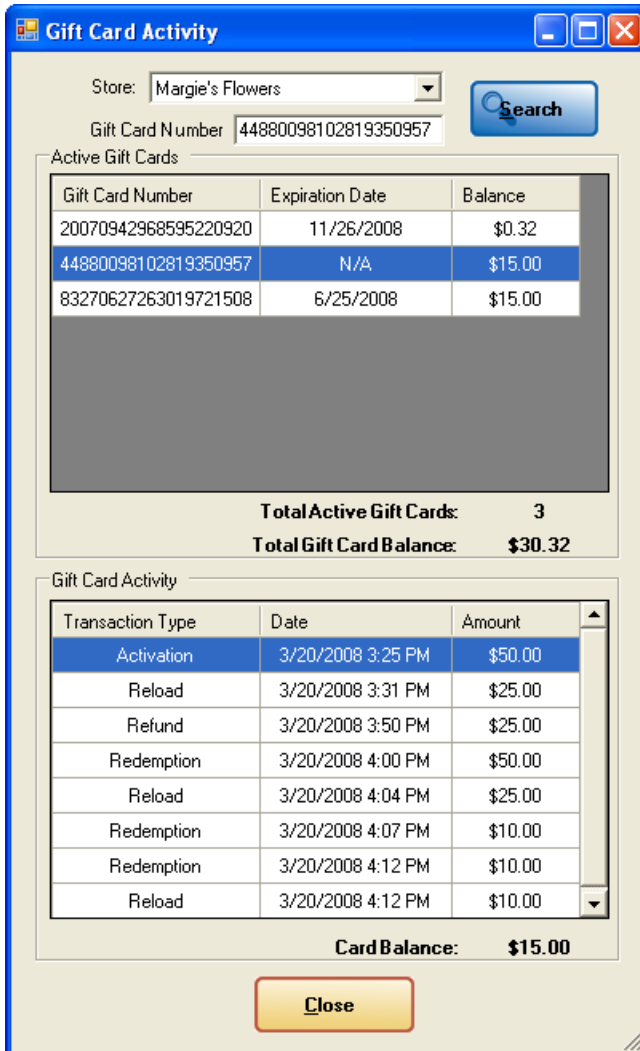
To view gift card activity:

- 1 On the FTD Mercury Main Menu, on the **Management** menu, click **Gift Card Activity**. The **Gift Card Activity** window opens.
- 2 If you have more than one store, select the correct store from the **Store** list.
- 3 In the **Active Gift Cards** area, highlight a gift card number, or enter a gift card number in the **Gift Card Number** field and click **Search**. The transactions for the gift card will appear in the Gift Card Activity area.

Gift Card Activity Window

The Gift Card Activity window allows you to view the gift cards that are active for your store and the transactions on each gift card. The Active Gift Cards area lists all gift cards sold in your store along with their expiration date and current balance. To view details on a particular gift card, select the gift card from the Active Gift Cards or enter the gift card number in the Gift Card Number field, then click Search. The Gift Card Activity area will list the transactions, including activation, loads, redemption, and refunds, completed for the selected gift card.

Figure 9-7: Gift Card Activity Window



Tickets

In FTD Mercury, you enter sales in Order Entry or Point of Sale. Each sale has a single customer, and contain one or more tickets (akin to jobs that must be performed for the sale). Each ticket has the common customer, but can otherwise be unique (that is, have different recipients, order types, delivery zones, delivery dates, and card messages). You should create a new ticket within a sale if one or more of the following is true:

- » There are different recipient addresses for items in the sale
- » The items in the sale need to go to a different delivery zone
- » The order is a different type (wire out, carry out, local delivery)
- » The order is for a different date
- » If you have multiple recipients and each card message is unique.

Within each ticket, you have one or more products (items). If you have multiple tickets, you may have identical items in each ticket. Because most orders have only one ticket, when you are searching for tickets, you are searching for orders. However, if more than one ticket exists for an order, you can limit the search to a particular ticket by using /1, /2, /3, etc., in the order number. If

you do not use the particular ticket number when searching for an order, all tickets are included in the results.

Ticket Search Window

In FTD Mercury, when you want to locate a ticket (or order), you use Ticket Search to do so.

Figure 9-8: The Ticket Search Window

Deliv Date	Delivery	Sale	Sale Date	Customer	Recipient/Ref	Sale Type	Pay Type	Total	Armt Paid	Design Status
02/27/2008		000011/1	02/27/2008	Heather Smith	Tom Jones	Local	Cash - OE	\$ 33.88	\$ 33.88	
02/27/2008		000010/1	02/27/2008	Heather Smith	Heather Smith	Carry Out	Cash - OE	\$ 40.68	\$ 40.68	

Ticket Search is accessible in several different ways:

- » On the FTD Mercury Main Menu, in the Search area, click Ticket. You can also use the keyboard shortcut (1).
- » On the FTD Mercury Main Menu menu bar, click the Search menu, and click Ticket Search.
- » In Order Entry or Point of Sale, click Lookup.

By default, when you open Ticket Search from the FTD Mercury Main Menu (either from the button or from the Search menu command), Ticket Search displays all tickets in your system by sale date for the current date and earlier. If you are in a multi-store environment, this default search uses the same store selection used the last time you performed a Ticket Search.

If you perform a Ticket Search from Order Entry or Point of Sale, it also by default displays all tickets in your system by sale date for the current date and earlier. However, in multi-store environments, it uses the selected store from Order Entry or Point of Sale.

Ticket Search Parameters

You must select at least one parameter to perform a ticket search. If you select more than one parameter, tickets must match all parameters to appear in the results list.

If you search by Order #, all other search parameters are automatically cleared. If you are using the order number, you will either find the ticket or not, so there is no need to search by other parameters in addition to the order number.

TIP You can also scan an invoice while in Ticket Search and the Order # field will automatically be selected and filled in with the numerical value from the bar code.

Table 9-14: Ticket Search Parameters

Parameter	Description
Store	Select the store to which you want to restrict the search. If you click Lookup from Order Entry or Point of Sale, the store associated with the order is automatically selected. You can also select --All Stores-- to include results from all stores.
Date	When using the Date parameter, you must select either Sale Date or Delivery Date. If you select Sale Date, all tickets prior to and including the date entered will be included in the results. If you select Delivery Date, all deliveries for the date you entered and forward are included.
Customer	<p>Use this parameter to search by:</p> <ul style="list-style-type: none"> » Customer name or customer sort name. If you enter in the first few letters of a customer's name or their sort name (from Customer Detail Information), the search will return any tickets with customers who have names or sort names which start with those letters. » Customer phone number (you must enter at least 7 digits). Results will include all phone numbers that match the phone number exactly (if you entered in a full phone number) or that begin with the numbers you entered (for partial matches). » Customer credit card (the credit card need not have been used on a ticket, but must be associated with the customer). <p>If you need to search for the customer by more specific criteria, click the Search button (...) to open the Customer Search window and search for the customer. Once you have located the customer in Customer Search, select the customer from the results list and click Select. You will be returned to Ticket Search with the customer's name filled into this field.</p>
Recipient	Use this parameter to search by recipient name, street address, or street name of the recipient. You can also enter the beginning of the information (for example, the beginning of a street name) and Ticket Search will return tickets that match.
Product Code	<p>Use this parameter to search by product code. If you want to search for a product code, click the Search button (...) to open the Product Search window. Once you have located the product, select it from the results list and click Select. You will be returned to Ticket Search with the product code filled into this field.</p> <p>You can also search for a range of codes by entering the first few letters. For example, if you want to search for all tickets that use product codes starting with FTD (FTD AB, FTD BH, FTD-SPA), just enter in FTD. All tickets with product codes that start with FTD will be included in the results.</p>
Zone	Use this parameter to search by active delivery zones. Select the zone you want to search from the list.

Table 9-14: Ticket Search Parameters (cont.)

Parameter	Description
Order #	<p>Use this parameter to search by sale number or ticket number. You can also scan the bar code of a ticket to enter the value.</p> <p>If you enter the Order # as SaleID/Ticket# (for example, 000342/2), your result will be the individual ticket for the sale. If you only enter the Sale ID (for example, 00342), your results will include all tickets for that sale.</p>
Type	<p>Use this parameter to search by order type. Select one of the following order types:</p> <ul style="list-style-type: none"> » C.O.D. » Pickup » Carry Out » Local » Pool » Wire Out » Payment » Credit Memo » Debit Memo
Order Status	<p>Use this parameter to search by order status. Select at least one of the following order statuses:</p> <ul style="list-style-type: none"> » Incomplete » Not Printed » Filed » Complete » Pending » Cancelled
Employee	<p>Use this parameter to search by employee. You also need to specify the function the employee performed (Clerk, Designer, or Driver), which can be different from their employee job function. For example, if someone has a job function of Designer, but enters the sale and selects her name from the Employee list in Order Entry or Point of Sale, that employee would show up under Clerk when searching for tickets using the Employee parameter.</p>
Production Status	<p>Use this parameter to search by production status. Select at least one of the following:</p> <ul style="list-style-type: none"> » Assigned » Not Assigned » Designed » Not Designed » Delivered » Not Delivered » Picture Not Sent (use this to locate all tickets that have a Design or Recipient picture associated with them but the picture has not been sent)

Results List

Once you have clicked Search, FTD Mercury searches the database for tickets that match your criteria and displays them in the results list.

Table 9-15: Results List Columns

Column	Description
Deliv Date	The delivery date for the ticket.
Delivery	The delivery status for the ticket.
Sale	The sale ID and ticket ID.
Sale Date	The date the sale was entered.
Customer	The customer who placed the order.
Recipient/Ref	The recipient name.
Sale Type	The sale type associated with the ticket.
Pay Type	The payment type, with OE appended for orders placed in Order Entry and POS appended to orders placed in Point of Sale.
Total	The total ticket amount.
Amt Paid	The amount allocated to the ticket total.
Design Status	The design status, which can be assigned (all products associated with the ticket have been assigned), designed (all products associated with the ticket have been marked designed), or blank (one or more products on the ticket have not been assigned or designed).

If there are more than 25 results matching your search parameters, the More button is enabled. When you click it, FTD Mercury loads the next 25 matches (while still displaying the first 25). If there are more than 50 matches, clicking More displays the next 25 (while still displaying the previous 50 matches), and so on.

TIP You can click on the column header in the results list to sort the results by that header.

When results are displayed in the Ticket Search window, the following color coding is used:

Table 9-16: Ticket Search Window Legend

Format	Description
Red Highlight	Tickets where a credit card had an error or was declined
Yellow Highlight	Cancelled tickets
Light Blue Highlight	Sales with associated refunds

Buttons

At the bottom of the window, there are several buttons in the button ribbon that allow you to perform some specific tasks in Ticket Search.

Table 9-17: Ticket Search Buttons

Button	Description
Select	(Only displayed when opening Ticket Search from Order Entry or Point of Sale) When you select the ticket from the results list and then click Select, you are returned to Order Entry or Point of Sale (depending on where you initiated the Ticket Search).
Print List	Prints the displayed list of results.
Output Invoice	Opens the Output Options window and allows you to print the invoice, form, and/or card for the selected ticket. You can also fax or email the invoice.
More	If there are more results than could be displayed in the results list at one time, click More to display additional results. As long as this button is enabled, there are more results to display in the results list.
Escape	Closes the Ticket Search window.

Searching for Tickets

TASK To search for a ticket:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. You can also open **Ticket Search** by clicking **Lookup** in **Order Entry** or **Point of Sale**.
- 2 Enter your search parameters and click **Search**. The results list displays a list of tickets that match your parameters.

TIP If you know an order contained more than one ticket, you can search for individual tickets by entering the ticket number in the format SaleID/Ticket# (for example, 000342/2 would search for the second ticket in sale number 000342). You can also just enter the Sale ID in the Order # field without the slash and ticket number and see all tickets that were created for the sale.

Printing Ticket Search Results

TASK To print Ticket Search results:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. You can also open **Ticket Search** by clicking **Lookup** in **Order Entry** or **Point of Sale**.
- 2 Enter your search parameters and click **Search**. The results list displays a list of tickets that match your parameters.
- 3 If the **More** button is enabled, click it until it is disabled (ensuring your results list has the complete set of results for your entered parameters).
- 4 Click **Print List**.

Printing Invoices from Ticket Search

You may need to print an invoice once you locate it in Ticket Search. You can easily do it from the Ticket Search window.

TASK To print an invoice from Ticket Search:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. Alternatively, you can click **Lookup** in **Order Entry** or **Point of Sale** to open the **Ticket Search** window.
- 2 Enter your search parameters to locate the ticket and click **Search**.
- 3 From the results list, select the ticket you want to output.
- 4 Click **Output Invoice**. The **Output Options** window opens.
- 5 In the **Print Output** area, ensure the **Print Invoice** check box is selected. (Likewise, ensure in the **Fax Output** and **Email Output** areas that the **Fax** and **Email** check boxes are cleared.)
- 6 In the **Print Output** area, ensure your **Store Name** is selected.
- 7 Ensure the selections for **Ticket**, **Form**, **Printer Name**, and **Printer Tray** are correct. The initial printer settings are based on the default settings for the store; individual forms can be printed to any printer/tray configured.

You can selectively print a single ticket from an order by selecting the ticket number from the **Ticket** field. If you select **ALL** for the **Ticket**, all tickets on the order will be printed. If you select **ALL** for the **Form**, all forms for that order type (as set in **Mercury Administration**) will print.
- 8 Click **Execute**.

TIP You can also fax and/or email invoices in the same way from Ticket Search by selecting the Fax Output and/or Email Output options in the Output Options window.

Opening Orders from Ticket Search

Once you locate a ticket in Ticket Search, you most likely want to open it up in Order Entry or Point of Sale. You may, for example, need to get additional information about the order, make changes to it, or cancel it. You can easily open up any ticket displaying in the Ticket Search results list.

TASK To open a ticket from Ticket Search:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. Alternatively, you can click **Lookup** in **Order Entry** or **Point of Sale** to open the **Ticket Search** window.
- 2 Enter your search parameters to locate the ticket and click **Search**.
- 3 Double-click the ticket from the results list. If you opened **Ticket Search** from **Order Entry** or **Point of Sale** initially, you can also click **Select** once you have selected the ticket from the results list. Either **Order Entry** or **Point of Sale** opens, depending on where the order was originally entered. You can then work with the ticket as necessary.

Copying Existing Tickets and Sales

FTD Mercury allows you to copy an existing ticket (or entire sale for an order with multiple tickets) from the Ticket Search window to create a new order. This enables you to quickly duplicate a sale, whether it be because you have the same customer placing another order where most of the information will be identical, or if you have a similar order where it would be easier to start from the existing order than from a blank order.

Copying an Entire Sale

You can copy an entire sale, regardless of whether it consists of a single ticket or multiple tickets.

TASK To copy an entire sale in Ticket Search and create a new order:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. Alternatively, you can click **Lookup** in **Order Entry** or **Point of Sale** to open the **Ticket Search** window.
- 2 Enter your search parameters to locate the ticket and click **Search**. Right-click on the ticket and select **Copy Sale**. The copied order opens as a new order in either **Order Entry** or **Point of Sale**. (If you performed the **Ticket Search** from the **FTD Mercury Main Menu** or by clicking **Lookup** in **Order Entry**, the new order will open in **Order Entry**. If you performed the **Ticket Search** by clicking **Lookup** in **Point of Sale**, the new order will open **Point of Sale**.) All tickets from the original sale are copied.
- 3 Modify the sale as necessary and complete the order as you normally would. If FTD Mercury is configured to require an employee name for each sale, you will have to select a name from the **Employee** list; the employee who entered the original sale will not be retained in the copied sale. Pay particular attention to the payment options in the Payments window to ensure they reflect the payment method(s) you want to use for the sale.

Copying an Individual Ticket

You can also copy an individual ticket from a multi-ticket sale and create a new sale from that ticket.

TASK To copy an existing ticket in Ticket Search to create a new order:

- 1 On the **FTD Mercury Main Menu**, click the **Ticket Search** button. The **Ticket Search** window opens. Alternatively, you can click **Lookup** in **Order Entry** or **Point of Sale** to open the **Ticket Search** window.
- 2 Enter your search parameters to locate the ticket and click **Search**. Right-click on the ticket and select **Copy Ticket**. The copied ticket opens as a new order in either **Order Entry** or **Point of Sale**. (If you performed the **Ticket Search** from the **FTD Mercury Main Menu** or by clicking **Lookup** in **Order Entry**, the new ticket will open in **Order Entry**. If you performed the **Ticket Search** by clicking **Lookup** in **Point of Sale**, the new ticket will open **Point of Sale**.)
- 3 Modify the ticket as necessary and complete the order as you normally would. If FTD Mercury is configured to require an employee name for each sale, you will have to select a name from the **Employee** list; the employee who entered the original sale will not be retained in the copied sale.

NOTE If the original sale was paid for with multiple payment methods, you will need to select the payment method in the new sale.

You can also duplicate tickets within an order. For more information, see [Working with Tickets in Order Entry/Point of Sale](#) on page 9-49.

Working with Tickets in Order Entry/Point of Sale

Creating Tickets

You create a ticket when you create a new order in **Order Entry** or **Point of Sale**. The first ticket is part of the order automatically. You can then create additional tickets if the same customer is ordering items for a different recipient, different delivery date, different delivery mechanism, or with a different card message.

Adding Additional Tickets

You can easily add an additional ticket to a sale in both **Order Entry** and **Point of Sale**. This enables you to use the same customer, but have different recipient, card, or delivery information.

TASK **To add an additional ticket:**

In **Order Entry** or **Point of Sale**, right-click on the **Ticket #1** tab at the bottom of the window and select **New Ticket**. Another tab will appear at the bottom of the window for the new ticket.

NOTE You cannot have more than 50 individual tickets in a sale.

Duplicating Tickets

In both **Order Entry** and **Point of Sale**, you can duplicate a ticket within the sale. This is useful if you have identical (or nearly identical) orders being sent to different recipients from the same customer.

TASK **To duplicate a ticket:**

In **Order Entry** or **Point of Sale**, right-click on the tab for the ticket you want to duplicate and select **Copy Ticket**. Another tab will appear at the bottom of the window for the copied ticket. The ticket will have the same information in it as the copied ticket.

NOTE You cannot have more than 50 individual tickets in a sale.

Removing Individual Tickets from Sales

You can remove individual tickets from a multi-ticket order in both **Order Entry** and **Point of Sale**. However, you cannot remove a ticket once payment has been received on an order (unless the sale is paid by house charge).

IMPORTANT If you remove a ticket from a sale, the ticket is removed, not cancelled. There will be no record that the ticket you removed ever existed.

TASK **To remove a ticket from an order that contains multiple tickets:**

- 1 In **Order Entry** or **Point of Sale**, right-click on the tab for the ticket you want to delete and click **Remove Ticket**.
- 2 When asked to confirm you want to remove the ticket, click **Yes**.

Once you have removed a ticket, the payment amount is updated to reflect the new order amount.

Handling Funerals

The **Funeral Log** in **FTD Mercury** allows you to enter details about a funeral, such as the name of the recipient, funeral home, and viewing and service date and time. You can then use the funeral details to complete recipient information for orders related to the funeral. When you populate the recipient of an order from the **Funeral Log**, the order is associated with the funeral. You can then generate an acknowledgement report showing all orders associated with the recipient/funeral to provide to the funeral home or family of the recipient.

Using the **Funeral Log** speeds up **Order Entry** and **Point of Sale** for funeral orders because you can enter funeral information once and use it for multiple sales. Creating an **Acknowledgement List** using the **Funeral Log's** print function enhances your relationship with funeral directors by allowing you to provide them with a report of your deliveries to their facility for a specific funeral.

Opening the Funeral Log

You can open the **Funeral Log** by clicking the **Funeral Log** button in **Order Entry** or **Point of Sale** (or using **ALT+L** as the keyboard shortcut). Only entries for the current or future funeral date are displayed. If no recipient has been entered in **Order Entry** or **Point of Sale**, the list of funerals will contain funerals with viewing or service times for the current or future dates.

Funeral Log Window

The Funeral Log window allows you to search for funerals, select recipients to use in Order Entry or Point of Sale, add funerals, update funeral information, print acknowledgements, and remove funerals.

Figure 9-9: Funeral Log Window

The screenshot shows the Funeral Log window with the following components:

- Search Parameters:** Includes checkboxes for Recipient Name, Facility Name, Start Date, and City/State. The Start Date is set to 4 / 2 / 2008. A Search button is located to the right.
- Table:** A table with columns: Recipient Name, Facility Name, Address, City, State, Zip, and Phone. The table is currently empty.
- Details:** A section for entering funeral information, including fields for Viewing Date, Viewing Time, Service Date, and Service Time, and a Notes text area.
- Buttons:** A row of buttons at the bottom: Select, Add (highlighted in yellow), Detail, Print, Remove, and Escape (highlighted in yellow).

The Funeral Log window contains the following areas.

Search Parameters

You can look up funerals that have been added to Funeral Log by searching for the name of the recipient, the name of the funeral home, the start date of the funeral, or the city and state where the funeral home is located. If multiple parameters are entered, the list of funerals displayed will contain only the funerals that match all parameters. To sort the results, click on a column header in the funeral list.

For instance, if you want to search for all funerals held during a particular week at a specific funeral home, enter the date for the beginning of the week and the name of the facility.

Funeral List

When you add or retrieve funeral information, the name of the recipient, the funeral home name, address, city, state, ZIP code, and telephone are listed for each funeral. When the Funeral Log is opened from Order Entry or Point of Sale and the recipient field is blank, all entries in the Funeral Log are displayed in alphabetical order by the recipient name. If you have already entered a recipient in Order Entry or Point of Sale, the funeral for the recipient name will appear in the Funeral Log if the service has been entered. If the funeral has not been entered, you can add it.

Funeral Details

When you highlight a funeral in the Funeral List, any details on the funeral that were entered when the funeral was added will appear as read-only text in the Details area. If the funeral has not occurred, you can add or change the details by clicking the Detail button.

TIP You can add notes to a funeral even if the funeral has occurred in the past.

Buttons

The Funeral Log window allows you to perform the following actions.

Table 9-18: Funeral Log Window Buttons

Button	Action
Select	Highlight a row in the Funeral List and click Select (ALT+L) to fill in the recipient information in Order Entry or Point of Sale. You can also double-click on the row in the Funeral Information.
Add	Click Add (ALT+A) to open a blank Add Recipient window to enter and save a new funeral.
Detail	Highlight a funeral the Funeral List and click Detail (ALT+D) to open and update the funeral.
Print	Highlight a funeral and click Print (ALT+P) to generate the Acknowledgement List report for the funeral.
Remove	Highlight a row in the Funeral Information area and click Remove (ALT+R) to delete the funeral information. You can only remove a funeral if no orders have been associated with it.

Adding Funerals to Funeral Log

To use the Funeral Log, you must first add the funeral. You use the Add Recipient window to add the funeral.

TASK **To add a funeral to Funeral Log:**

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. The **Funeral Log** window opens.
- 2 Click **Add**. The **Add Recipient** window opens.
- 3 In the **Recipient Name** field, enter the name of the recipient. You must enter a recipient name.
- 4 In the **Funeral** area, enter the date and time for the viewing and the date and time for the service.
- 5 Enter funeral home information. You can either click the **Facility Search** button to locate the funeral home, or manually enter the funeral home information in the **Facility Name**, **Address**, **City**, **State**, **Postal Code**, and **Phone** fields. For more information, see [Facility Search](#) on page 5-13.
- 6 If there are any notes, add them to the **Notes** field.
- 7 Click **Save**.

Add Recipient Window

The Add Recipient window enables you to both add funerals to the Funeral Log as well as edit details about the funeral once you have added it.

Figure 9-10: Add Recipient Window

The window consists of the following fields:

Table 9-19: Add Recipient Window Fields

Field	Description
Recipient Name	Enter the name of the recipient.
Facility Name	Enter the facility for the funeral. You can also click the Facility Search button to select a facility, which will automatically populate the Address, City/State, Postal Code, and Phone fields.
Address	Enter the address of the facility. If you selected the facility using the Facility Search, this is already filled in for you.
City/State	Enter the facility's city and state/province. If you selected the facility using the Facility Search, this is already filled in for you.
Postal Code	Enter the facility's postal code. If you selected the facility using the Facility Search, this is already filled in for you.
Phone	Enter the facility's phone number. If you selected the facility using the Facility Search, this is already filled in for you.
Viewing Date	Enter the date for the viewing. You can also click the arrow at the right of the field to display a calendar.
Viewing Time	Enter the viewing time.
Service Date	Enter the date for the service. You can also click the arrow at the right of the field to display a calendar.
Service Time	Enter the service time.
Notes	If there are any additional notes, enter them in this field. You can add notes to a funeral if the funeral occurred in the past.

After entering or editing information, click Save to save your changes or Escape to discard them.

Using Funerals to Select Recipients

Once funerals have been added to the Funeral Log, you can use the Funeral Log to fill in the Recipient for new orders. When you create an order for a recipient who is listed in the Funeral Log, the order is associated with the funeral and will appear in the Acknowledgement List.

NOTE If you copy a ticket or sale that has a recipient selected using the Funeral Log, the new tickets will also be associated with the funeral, as long as you do not change the recipient name.

TASK To complete the Recipient information from the Funeral Log:

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. Current or future funerals will appear in the list of funerals.
- 2 From the list of funerals, click the recipient and click **Select**, or simply double-click on the recipient. The **Funeral Log** window will close and the recipient information will appear in the **Recipient** area of **Order Entry** or **Point of Sale**.

Changing Funeral Information

You can change any of the funeral information in the Funeral Log for funerals for which no orders have been placed. If orders have been placed for the funeral, only the notes for the funeral can be changed.

TASK To change funeral information:

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. The **Funeral Log** window opens.
- 2 Enter search criteria to locate the funeral. You can search using **Recipient Name**, **Facility Name**, **Start Date**, **City/State**, or some combination of search parameters. Click **Search**.
- 3 From the results list, select the funeral that you want to edit and click **Detail**. The **Add Recipient** window opens.
- 4 Make any changes as necessary and click **Save**.

Generating Acknowledgement List Reports

Using the Print button on the Funeral Log window, you can print an Acknowledgement List report to give to the funeral home or family of the recipient. The Acknowledgement List report will be formatted for printing on your store letterhead and includes the following information:

- » Date printed
- » Number of pages
- » Recipient Name
- » Sender Name (if the order was sent via a wire service or with a cash account, this is not printed)
- » Sender Address (if an invoice address is entered for the order, it will display as the sender's address)
- » Product description
- » Card message

TASK To print the Acknowledgement List:

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. The **Funeral Log** window opens.
- 2 Enter search criteria to locate the funeral. You can search using **Recipient Name**, **Facility Name**, **Start Date**, **City/State**, or some combination of search parameters. Click **Search**.
- 3 From the results list, select the funeral for which you want to generate the Acknowledgement List report and click **Print**.

Removing Funerals

You can delete funerals for which no orders have been placed. Funerals for which orders have been placed remain in the Funeral Log until the orders associated with the funeral have been purged by your system. Orders are purged automatically by the Mercury System based on the Months to Hold setting in Mercury Administration. For more information, see [General Screen](#) on page 24–57.

TASK To remove a funeral with no orders:

- 1 In **Order Entry** or **Point of Sale**, click the **Funeral Log** button. The **Funeral Log** window opens.
- 2 Enter search criteria to locate the funeral. You can search using **Recipient Name**, **Facility Name**, **Start Date**, **City/State**, or some combination of search parameters. Click **Search**.
- 3 From the results list, select the funeral you want to remove and click **Remove**.

Working with Recipient Pictures

Recipient pictures are pictures you attach to an order with the intent of sending them to the sending florist (in the case of wire orders), or to customers (in the case of local orders). The message to the sending florist or customer does not get sent until you actively decide to send it. Sending florists receive an ANS message with a URL to the picture; customers receive an email message with a link to the picture.

TIP You can use recipient pictures as both a customer satisfaction tool (allowing customers to see designs produced for their recipients) as well as a way to show the quality of your work to sending florists—which can ultimately drive more wire order business to you!

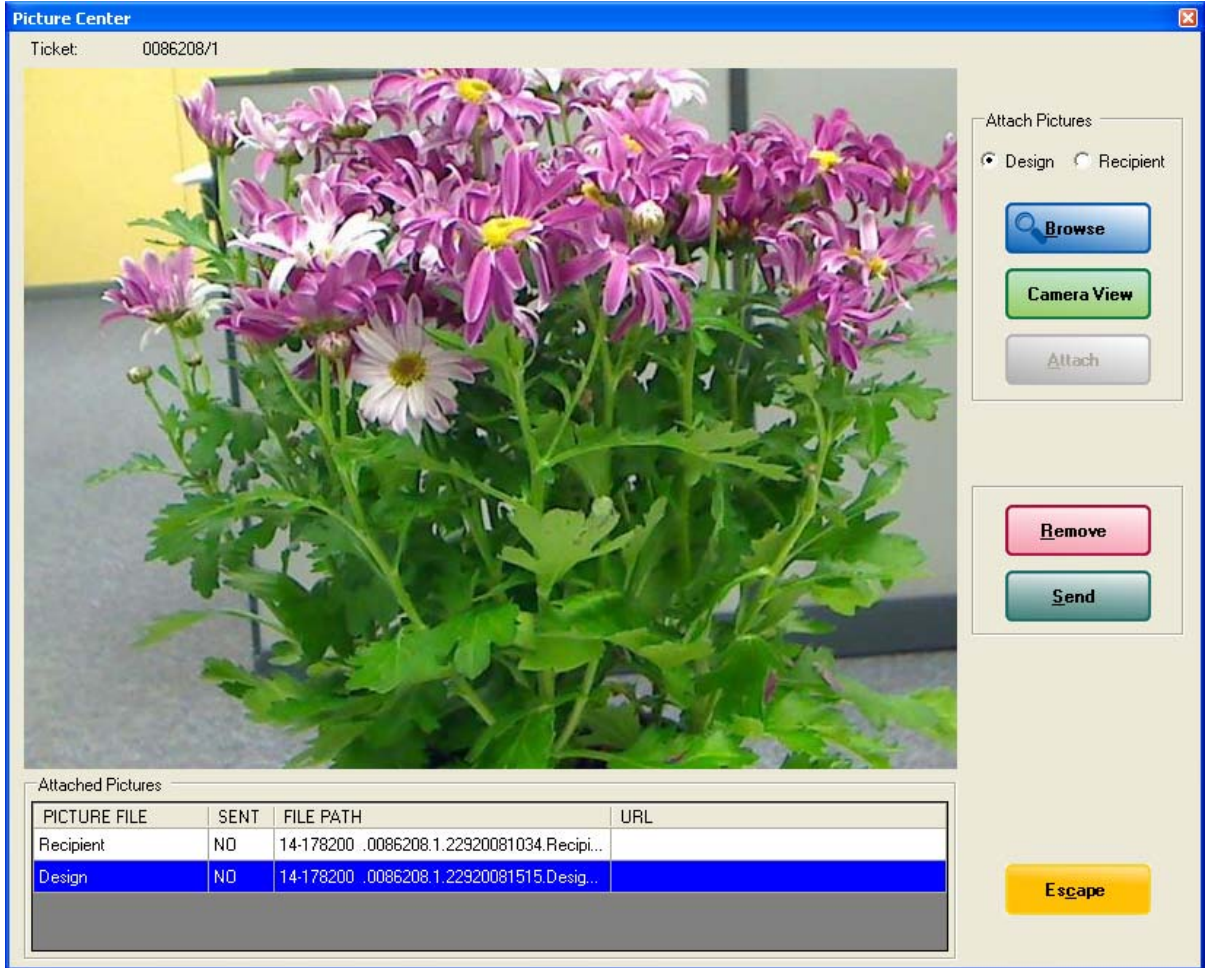
You can take pictures with the Logitech QuickCam attached to your Mercury system or with your own camera. If you take pictures with your own camera, you must upload them to your Mercury computer before using the Picture Center to attach and send the pictures.

Attached pictures must be JPEG format files. The system automatically sizes the pictures to 1024 pixels by 768 pixels. Sending recipient pictures requires that your Mercury system be always online and using MNAPI. The florist must also be assigned a CCAPI account ID and password.

Picture Center Window

The Picture Center window is the interface for selecting or taking pictures to attach to local products. You also use the Picture Center window to select or take pictures to attach to tickets and to send the pictures that are attached to tickets. When attaching a picture to a ticket, the Picture Center contains options for design and recipient pictures. You also use the Picture Center to view pictures attached to products or tickets. When viewing pictures in the Picture Center, some Picture Center controls may be disabled.

Figure 9-11: Picture Center Window when Attaching Pictures to Tickets



The Picture Center window contains the following areas.

Ticket or Product

The ticket number to which you are attaching pictures appears below the Picture Center window title bar. When the Picture Center window is opened from the Product Entry screen, the name of the product appears below the Picture Center window title bar.

Attach Pictures

Attach Pictures controls enable you to select a picture, take a picture, and attach a picture. If you are attaching a picture to a ticket, you can select whether to attach a design picture or a recipient picture.

Table 9-20: Attach Pictures Controls

Setting	Description
Design/Recipient	When attaching a picture to a ticket, select Design or Recipient to indicate the type of picture. The file name for the picture will contain Design or Recipient so that you can quickly identify the type of picture.
Browse	Use Browse to search for and select pictures saved on your computer. When you select a picture, it will appear in the image area of the Picture Center window.

Table 9-20: Attach Pictures Controls (cont.)

Setting	Description
Camera View / Take Picture	<p>Use Camera View to open the Logitech QuickCam menu. When you click Camera View and a camera is attached, the Camera View button will change to Take Picture, allowing you to take a picture.</p> <p>NOTE: You must have a camera installed to use Camera View. If you click Camera View without having a camera installed, you will receive an error message.</p> <p>Click Change Settings on the Logitech QuickCam tool bar to open the Webcam Settings dialog box where you can control the camera's zoom, pan, and tilt.</p> <p>When you click Take Picture, the picture appears in the image area, and the Logitech QuickCam menu closes.</p>
Attach	Use Attach to save the picture to the product or ticket. The Attached Pictures area of the Picture Center window shows the picture file name.

Attached Pictures

Attached Pictures shows information about the pictures attached to a product or ticket. For pictures attached to products, Attached Pictures shows the file name of the picture. For pictures attached to tickets, Attached Pictures also includes details about sending the picture.

Table 9-21: Attached Pictures Area

Field	Description
Picture File	For pictures attached to tickets, Picture File indicates if the picture is a Design or Recipient picture.
Sent	For pictures attached to tickets, Sent tells you whether the picture has been sent. Yes indicates that the picture has been sent. No indicates that the picture has not been sent.
File Path	<p>File Path shows the name of the file as stored by the Picture Center on your computer. The file path of pictures attached to products includes the product name and a system generated number. The file path of pictures attached to tickets includes the ticket number.</p> <p>Pictures are saved on your computer's C: drive in the FTD Album folder. Pictures attached to products are saved in a Products folder in the FTD Album folder.</p>
URL	For pictures attached to tickets that you have sent, URL shows the path to the picture on the FTD web server. You can click the URL to display the picture stored on the FTD web server.

Remove

Remove unattached the picture from the product or ticket to which it was attached. When you remove a picture, the image area of the Picture Center is blank. The picture file remains in the C: FTD Album folder on your computer. If the picture has been uploaded to the FTD web server, clicking Remove also removes it from the FTD web server.

Send

Send uploads the picture to the FTD web server and sends a Mercury ASK message or opens the Output Options window, depending on the type of ticket to which the picture is attached. When

sending is complete, the Sent field in the Attached Pictures area will show Yes, and the URL field will contain the path to the picture on the FTD web server.

Attaching Pictures to Tickets

You may want to attach a picture to a ticket. You can then send a link to the picture to the sending florist (for wire orders), or to the customer (for local orders).

Taking and Attaching Pictures to Tickets

FTD Mercury enables you to take pictures using a Logitech QuickCam Orbit AF camera. The Logitech QuickCam must be attached to your computer in order for you to take pictures from the Picture Center window. You can attach multiple pictures to a ticket.

TASK To take pictures with the Logitech QuickCam:

- 1 Perform a Ticket Search to locate the ticket.
- 2 From the results list, double-click the ticket to open it in Order Entry or Point of Sale.
- 3 Click Picture. The Picture Center window opens.
- 4 Click **Camera View**.
- 5 Select **Recipient**.
- 6 Place the product so that it is in view of the Logitech QuickCam.
- 7 If you want to change the camera settings, click **Change Settings** in the Logitech QuickCam tool bar.
- 8 Click **Take Picture**.
- 9 If you are satisfied with the picture and want to save it, click **Attach**. If you want to retake the picture, click Camera View again and retake the picture before you attach it.

If you are attaching pictures to a ticket, take as many additional pictures as you like. When you are finished, click Escape to close the Picture Center window.

Browsing and Attaching Pictures to Tickets

If you do not have a Logitech QuickCam Orbit AF camera, you can still attach pictures you have taken if they are on your computer. Pictures must be JPEG format files. The system automatically sizes the pictures to 1024 pixels by 768 pixels.

TASK To browse for pictures:

- 1 Perform a Ticket Search to locate the ticket.
- 2 From the results list, double-click the ticket to open it in Order Entry or Point of Sale.
- 3 Click Picture. The Picture Center window opens.
- 4 Click **Browse** and navigate to a picture already on your computer.
- 5 Click **Attach**.

When you are finished, click Escape to close the Picture Center window.

Sending Product Pictures

You can send pictures that you have attached to tickets. When you send a picture, the system uploads the picture to the FTD web server and acknowledges that a picture was sent. If the order is a local order, FTD Mercury opens the Output Options window for you to send the customer the link to the picture. For wire orders, if you are a filling florist, when you send a picture, FTD Mercury sends an ASK message to the sending florist with the URL for the picture.

TASK To send pictures:

- 1 Perform a Ticket Search to locate the order, and double-click it to open the order in Order Entry or Point of Sale.
- 2 Click **Picture**. The **Picture Center** window opens.

NOTE

- If there are pictures attached to the ticket, the Picture button will include an icon of a picture. If it does not, there are no pictures currently attached to the ticket.
- 3 In the **Attached Pictures** area, select the picture to send.
 - 4 Click **Send**. Depending on the type of order, the system does one of the following:
 - » For incoming wire orders over the Mercury Network, FTD Mercury sends an ASK message containing the URL for the picture.
 - » For local orders, the Output Options window opens. The sender will be the user who is logged in, and the customer and customer email address will be populated from the customer record, if available. Click Execute to send the customer a link to the picture.

Output Options Window

When you click Send in the Picture Center window for recipient pictures, the Output Options window opens if it is a local order.

Figure 9-12: Output Options Window

Email Output Area

The Email Output Area contains the following fields and options:

Table 9-22: Email Output Area Options and Fields

Option/Field	Description
Email	This box must be checked to send email.
Now/Later	Select Now to send the email now. Select later and specify the date and time if you do not want to send the message now.
Cover Letter	Select the cover letter to use for the message.

Table 9-22: Email Output Area Options and Fields (cont.)

Option/Field	Description
Customer Email Address	Enter the customer's email address. If the customer's email address is on file, this will be filled in automatically.
Carbon Copy	If desired, enter an email address you want to carbon copy for this message. For example, you may want to send it to your own email address.
Subject	The subject line for the email message

Email Information Area

The Email Information area contains the following fields:

Table 9-23: Email Information Area Fields

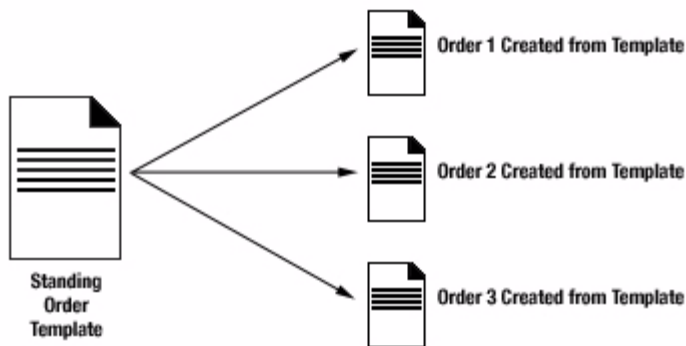
Field	Description
Customer	The name of the customer from the ticket.
Sender	The user on the FTD Mercury system who is sending the email message.
Job Description	The description that will be included in the Fax & Email Monitor.
Personal Message	Enter the text for the message. By default, this message includes the link to the image.

Standing Orders

Florists often receive orders from religious organizations and businesses that must be filled at regular intervals. Billing for these orders must also occur at regular intervals. To assist in this process, FTD Mercury allows these recurring, standing orders, to be created once as a standing order template. The contents of this template are used by FTD Mercury to automatically create the order at a predetermined interval, whether that be yearly, monthly, weekly, daily, or even on a custom schedule.

Standing order templates are not orders; they are used to create orders. Each template contains the customer information, recipient information, product information, delivery information, and the card message. This information is duplicated for each future recurring order in the series.

Figure 9-13: Relationship Between Standing Order Templates and Orders



FTD Mercury checks for orders to be created and printed nightly and after each reboot. If FTD Mercury cannot create an order from the standing order template, it will display a message with details.

Creating Standing Order Templates

Prior to creating a standing order template, you must add the customer with whom the standing order template will be associated to your FTD Mercury database (see [Adding New Customers](#) on page 7-18), and that customer must have a house account (see [Setting Up House Accounts](#) on page 7-23). Once you have a customer set up in FTD Mercury, you can create the standing order template.

TASK To create a standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template will be associated.
- 2 In the **Customer Detail** window, click the **Standing Order** tab.
- 3 Click **New Standing Order**. The **Standing Order Scheduler** window opens.
- 4 From the **Start Date** and **End Date** lists, select the start and end date for standing orders. The start date represents the first delivery date, and the end date represents the last possible date that an order will be created based on this template. By default, both of these dates are set to the current date.

NOTE You cannot select a start date prior to the current date.

- 5 Select the recurrence frequency (**Daily, Weekly, Monthly, or Yearly**). By default, this is set to **Weekly**.
- 6 Click **Generate**. The **Delivery Dates** list populates with the dates on which orders will be scheduled for delivery based on your selections, with the first delivery date the same as the Start Date. Review these dates and make changes as necessary.
 - » If there are dates in the list you do not want to include, select them and click **Remove**.
 - » If there are additional dates you want to add, select the date on the calendar and click **Add**. You can only add dates between the selected **Start Date** and **End Date**.
- 7 Select the day of the week on which the order will be created and printed (or transmitted if the order is for wire out). If the first order is scheduled for the next day, the order will be created and printed/transmitted overnight for that order only. (For more details on the number of days ahead of the order the invoice will print, see [Lead Time](#) on page 7-17).
- 8 Click **Save**. The scheduling details are saved.
- 9 Click **Next**. The **Order Entry** window opens, allowing you to enter the product(s) in the order, as well as delivery information. Although the Order Entry window for standing order templates is identical to the standard Order Entry window, some functionality is disabled, and some information (such as **Customer Name**) is pre-populated.
 - » **Notes** for the order include the date and time the standing order was generated, as well as the standing order template that was used for order creation.
 - » The **New Ticket** button is disabled. You can only use a single ticket for standing order templates.
 - » Customer search is disabled; the customer will be the same as the customer with whom the standing order template is associated. You cannot add a new customer, nor can you view customer information.
 - » The **Delivery Date** defaults to the first delivery date as defined in the Standing Order Scheduler window and cannot be changed.

- » You can only use the **House** account payment type; credit card, cash, and debit payment types are disabled.
 - » Your delivery type can be **Wire, Pickup, Local, or Carry Out**.
 - » If you select a delivery zone that is not configured to print an invoice, you will receive a warning.
 - » The **Store Name** will be the name of the store you are currently logged in to and cannot be changed. However, you can use the Store Transfer list to transfer a standing order to another store.
- 10 If you selected a wire out delivery zone, enter florist information for the filling florist.
 - 11 Click **Complete**. The **Payment** window opens, displaying the amount for the order, including taxes and delivery fees.
 - 12 Click **Complete**. You are returned to the **Standing Order** tab in the **Customer Detail Information** window. The new standing order template will not appear in this window until you return to it at a later time.
 - 13 Click **Escape** to return to the **Main Menu**.

If you created a standing order template for a wire out order, FTD Mercury will transmit the wire out order during the night of the day you selected

Editing Existing Standing Order Templates

TASK To change an existing standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the list of active standing order templates, double-click on the appropriate standing order template. The **Standing Order Scheduler** window opens.
- 4 Make any changes to the **Start Date, End Date**, and recurrence for the template. If you do make changes to these, click **Generate** to create the new **Delivery Dates** list.

- NOTE** You can change the Start Date only if orders have not yet been generated based on this standing order template.
- 5 Review dates in the **Delivery Dates** list and make changes as necessary. If you changed the **End Date** to earlier than it was before, any delivery dates that fall after that date have been removed. If the new **End Date** is later than the previous **End Date**, new delivery dates may have been added based on the recurrence pattern.
 - » If there are dates in the list you do not want to include, select them and click **Remove**.
 - » If there are additional dates you want to add, select the date on the calendar and click **Add**. You are warned if the date you are adding is after the standing order template's end date.
 - 6 If you want to make changes to product or delivery information, click **Save** and then click **Next**.
 - a. Make necessary changes in the **Order Entry** window.
 - b. Click **Complete** to return to the **Standing Orders** tab of the **Customer Detail Information** window.
 - 7 If you did not need to make changes to product or delivery information, click **Save** to return to the **Standing Orders** tab of the **Customer Detail Information** window.
 - 8 Click **Escape** to exit the **Customer Detail Information** window.

Any changes you make to an existing standing order template will be reflected when FTD Mercury creates future orders; already created orders will not reflect these changes.

Deleting Existing Standing Order Templates

TASK To delete an existing standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the list of active standing order templates, select the standing order template you want to delete and click **Remove**.
- 4 When asked, confirm the deletion.

The **Standing Order** tab refreshes and the standing order template you deleted is no longer displayed. FTD Mercury will not generate any future orders that were scheduled to be created based on this template.

Deleting Upcoming Orders to be Generated by a Standing Order Template

For various reasons, you may need to delete an upcoming order scheduled to be created by a standing order template, yet not want to delete the template itself.

TASK To delete an upcoming order that will be generated by a standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the list of active standing order templates, double-click on the appropriate standing order template. The **Standing Order Scheduler** window opens.
- 4 In the **Delivery Dates** list, select the date you want to remove and click **Remove**.
- 5 Click **Save**.

FTD Mercury will not generate the order for the date you removed.

NOTE You can only delete upcoming orders if the order has not been generated and printed already. If an order has been generated, you must cancel it as you would another order in the system.

Removing All Upcoming Orders Based on a Standing Order Template

TASK To delete an upcoming order that will be generated by a standing order template:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the list of active standing order templates, double-click on the appropriate standing order template. The **Standing Order Scheduler** window opens.
- 4 Click **Remove All**.
- 5 Click **Save**.

All future orders based on the standing order template that have not yet been generated are deleted. Orders that have already been generated must be deleted as you would with any other generated orders in FTD Mercury.

Printing a List of Standing Order Templates

You can print a list of the standing order templates associated with a customer. This prints only the list of standing order templates and not orders created from the templates.

TASK To print a list of standing order templates associated with a customer:

- 1 Perform a **Customer Search** to locate the customer with whom the standing order template is associated.
- 2 Click the **Standing Order** tab.
- 3 From the **Store Name** list, select the store for which you want to display standing order templates associated with this customer, or select **All Stores** for a comprehensive list.
- 4 Click **Print Order**.

NOTE If there are many standing order templates, you may need to click **More** and repeat this procedure for subsequent pages in the grid.

Order Entry Invoices

When an order is saved in Order Entry, an invoice prints to your printer. FTD Mercury provides several configurable invoices (forms) to use when creating orders. The forms fall into the following main categories:

- » [Billing Invoices](#)
- » [Working Invoices](#) (also called worksheets)
- » [Cards](#)

Order Entry invoices can be customized in Mercury Administration. You may want to change the layout of the invoice so that you can print invoices on your store's special letterhead paper, or so that the invoice fits in a special window envelope. You may also want to omit certain information.

- » To change the guarantee message that prints at the bottom of the invoice, see [Store Settings Screen](#) on page 24–60.
- » To change the position of the addresses on the invoice, see [Form Alignment Screen](#) on page 24–77.
- » To change the items that are included on forms, see [Form Format Screen](#) on page 24–82.

Billing Invoices

There are two billing invoices available in FTD Mercury: Billing Invoice (Letter) and Billing Invoice (Legal). They are essentially the same form, with the main differences being paper size and Billing Invoice (Legal) includes a quad-fold card. Generally, you will print on the letter-sized billing invoice if you are printing trifold cards (and therefore do not need quad-fold cards from the invoice).

TIP For shops that used FTD Mercury prior to 8.0, the Billing Invoice (Legal) was the standard billing invoice.



The invoice contains a receipt, delivery slip for the delivery driver, and a card for the recipient. Most florists choose to print Order Entry invoices on invoice paper, which is perforated so that the card and delivery slip can be separated from the receipt portion of the invoice. When you complete or an order, the invoice prints with the words PICKUP, CARRY OUT, or WIRE OUT in large letters to indicate the order type (if other than local delivery). If you cancel an order, the word CANCELLED is printed on the invoice. If you file an invoice, the word FILED is printed on the invoice. Invoices for all order types include the time the order was entered.

NOTE When you select Sympathy as the occasion code in Order Entry or Point of Sale, legal-sized invoices print the funeral acknowledgement address (the sender's address) instead of the care instructions.

Working Invoices

There are two working invoices (worksheets) available in FTD Mercury: Working Invoice (Letter) and Working Invoice (Legal). They are essentially the same form, with the main differences being paper size and the Working Invoice (Legal) includes a quad-fold card. Generally, worksheets are used in the design portion of your shop. They contain all the pertinent information you need, including a product-by-product breakdown of the items in the order, second choice preferences, and order notes. For each item in the order that is not a fee (relay, delivery, etc.), the item appears on a separate line with a large check box that your designer can check when the item has been completed. If a recipe is available for the item, it is also displayed below the item name.

Figure 9-15: Working Invoice (Letter)

ORDER NO: 000138/1 of 1 	Worksheet Doc's Blooms	DELIVERY DATE: Thu, 1/11/2007 DELIVERY TIME:																																			
CUSTOMER: Jennifer Jones P: (630)555-1212 ORDER BY: Jennifer	PAYMENT: House SALESPERSON: Jim Roberts OCCASION: Birthday	Page 1/1 COPY NO: 6																																			
<table border="1"> <thead> <tr> <th>PRODUCT</th> <th>QUANTITY</th> <th>PRICE/UT</th> <th>DISCOUNT</th> <th>EXTENDED</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> ARR Arrangements</td> <td>1</td> <td>50.00</td> <td></td> <td>50.00</td> </tr> <tr> <td>DELIV Delivery Charge</td> <td>1</td> <td>9.00</td> <td></td> <td>9.00</td> </tr> <tr> <td colspan="4">SECOND CHOICE: Dozen Roses</td> <td></td> </tr> <tr> <td colspan="4"></td> <td>SUB-TOTAL 50.00</td> </tr> <tr> <td colspan="4"></td> <td>Sales Tax 9.00</td> </tr> <tr> <td colspan="4"></td> <td>TOTAL 62.98</td> </tr> </tbody> </table>			PRODUCT	QUANTITY	PRICE/UT	DISCOUNT	EXTENDED	<input type="checkbox"/> ARR Arrangements	1	50.00		50.00	DELIV Delivery Charge	1	9.00		9.00	SECOND CHOICE: Dozen Roses									SUB-TOTAL 50.00					Sales Tax 9.00					TOTAL 62.98
PRODUCT	QUANTITY	PRICE/UT	DISCOUNT	EXTENDED																																	
<input type="checkbox"/> ARR Arrangements	1	50.00		50.00																																	
DELIV Delivery Charge	1	9.00		9.00																																	
SECOND CHOICE: Dozen Roses																																					
				SUB-TOTAL 50.00																																	
				Sales Tax 9.00																																	
				TOTAL 62.98																																	
Card: HAPPY BIRTHDAY! FLORIST ID: 90-9085SN GROW FLOWER SHOP CHICAGO, IL 60611	PHONE: (630)555-1212	MERCURY ID: D8707H-0081																																			
ORDER NO: 000141/1 of 1 DELIVERY ZONE: DG1	Heather Jones 123 Main Street Downers Grove, IL 60516 (630)555-1212	 DELIVERY DATE: Thu, 1/11/2007																																			
Thu, 1/11/2007 RECEIVED BY _____	Doc's Blooms	COPY NO: 1																																			

NOTE

When you select Sympathy as the occasion code in Order Entry or Point of Sale, legal-sized invoices print the funeral acknowledgement address (the sender's address) instead of the care instructions.

Cards

FTD Mercury provides one form that prints only a card, the TriFold Card form. However, the legal version of the billing invoice also includes a card. Typically, you will use the trifold card along with a letter version of the billing invoice.

The TriFold Card form in FTD Mercury allows you to print on a 4x9½-inch trifold card. The card itself consists of three sections. The upper section (3x4 inches) is for the card message. The middle section (3¼x4 inches) is for care instructions. The bottom section (3¼x4 inches) is for the recipient name and address.

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

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

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

You can configure the information printed on the TriFold Card form in the Form Formats screen of Mercury Administration. By default, all information will print for the TriFold Card form except for Borders. If you do not print borders, you can easily use imprinted paper for your trifold cards.

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

Figure 9-16: TriFold Card

The diagram shows a vertical tri-fold card with the following content and callouts:

- 1**: Points to the outer border of the card.
- 2**: Points to the "CARE INSTRUCTIONS" section, which contains the text: "Ensure the arrangement is properly watered each day and is stored in a temperate location without drafts. Change the water every two days."
- 3**: Points to the "Doc's Blooms" store name.
- 4**: Points to the recipient's phone number, "(630)555-1212".
- 5**: Points to the "DELIVERY DATE: 1/11/2007" field.
- 6**: Points to the "DELIVERY TIME:" field.
- 7**: Points to the "ZONE: DG1" field.
- 8**: Points to the "ORDER NO: 000145/1 of 3" field.
- 9**: Points to the barcode.

The card content is as follows:

Happy 21st Birthday!

Love,
James, Jennifer,
Mom & Dad

CARE INSTRUCTIONS

Ensure the arrangement is properly watered each day and is stored in a temperate location without drafts. Change the water every two days.

Doc's Blooms

Heather Smith
123 MAIN STREET
DOWNERS GROVE, IL 60516
(630)555-1212

DELIVERY DATE: 1/11/2007
DELIVERY TIME:

ZONE: DG1
ORDER NO: 000145/1 of 3

- | | | |
|----------------------------|--------------------------|------------------------|
| 1 Border | 4 Recipient Phone | 7 Delivery Zone |
| 2 Care Instructions | 5 Delivery Date | 8 Order Number |
| 3 Store Name | 6 Time Detail | 9 Bar Code |

Pool Tickets

If you purchase a license for pool tickets, FTD will customize a form for your delivery pool based on your specifications. Like other forms, the number of pool tickets printed per sale type is configured in the **Default Form Printing** screen in Mercury Administration. You configure the printers with pool tickets in the **Printer Form Settings** window (see [Printer Form Settings Window](#) on page 2-12 for details).

Contact Mercury Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com for information on purchasing a license and creating a custom pool ticket.

Printing Invoices to Remote Locations

If you need to print an invoice to a remote location, you can do so using one-off printing (see [One-Off Printing](#) on page 9-83 for details). You can also set up a remote printer as your default printer for forms see [Printer Form Settings Window](#) on page 2-12 for details).

Faxing and Emailing Invoices

In addition to printing invoices, you can also fax and/or email an invoice to a customer.

NOTE The setup requirements for faxing and emailing invoices are the same as for faxing and emailing statements. See [Required Setups for Faxing and Emailing Statements](#) on page 18-4 for more information.

TASK **To fax or email an invoice to a customer:**

- 1 Perform a ticket search to locate the order.
- 2 Select the order and click **Output Invoice**. The **Output Options** window appears, allowing you to set your print/fax/email settings.
- 3 Select whether you want to print, fax, and/or email the invoice to the customer.
- 4 Check the settings for each option. Make sure the fax number and email address fields are populated, and indicate the cover letters you want to use.
- 5 When you are finished, click **Execute** and the print job/fax/email is sent.

To view the status of the fax or email, check the **Fax and Email Monitor**. For faxes and email messages, the **Fax and Email Monitor** displays the order/ticket number, customer name, status, sent date/time, fax number/email address, and number of attempts. For more information on the **Fax and Email Monitor**, see [Fax and Email](#) on page 22-1.

Output Options Window

The **Output Options** window allows you to select your printing, faxing, and e-mailing settings when sending invoices. You can also print one-off forms and reprint Point of Sale receipts from this window.

Figure 9-17: Output Options Window

The screenshot shows the 'Output Options' window with the following settings:

- Print Output:**
 - Print Invoice
 - Print Receipt
 - Store Name:
 - Statements Per Page: One Two
 - Ticket:
 - Form:
 - Printer Name:
 - Printer Tray:
- Fax Output:**
 - Fax
 - Now Later
 - Time:
 - Cover Letter:
 - Fax Number:
- Email Output:**
 - Email
 - Now Later
 - Time:
 - Cover Letter:
 - Recipient Email Address:
 - Carbon Copy:
 - Subject:
- Fax and Email Information:**
 - Recipient:
 - Sender:
 - Job Description:
 - Personal Message:

Buttons at the bottom:

First select whether you would like to print, fax, and/or email the invoice to the customer (select the check box so a check mark appears). You can select any combination of these three methods:

Table 9-24: Output Methods

Method	Description
Print	Select whether you are printing an invoice or a receipt (receipts can only be printed from Point of Sale). If you are printing invoices, ensure your store name is selected (which dictates the available printers). Then select the ticket you are printing, the form to use, the printer, and the tray in the printer.
Fax	If you are faxing the invoice, first select whether you would like to fax Now or Later. If you select Later, you can specify a later time. Enter the customer's fax number and select a cover letter (fax cover letters are maintained in Mercury Administration).

Table 9-24: Output Methods (cont.)

Method	Description
Email Output	If you are e-mailing the invoice, first select whether you would like to e-mail Now or Later. If you select Later, you can specify a later time. Enter the customer's e-mail address and select a cover letter (cover letters are set up in the FTD Document Center). Enter the customer's e-mail address (if one does not display). If you would like a copy of the e-mail to be sent to your e-mail inbox, enter that e-mail address in the Carbon Copy field. The Subject field is the subject line of the e-mail.

Fax and Email Information

If you are faxing or emailing the invoice, type the customer name in the **Recipient** field, type your name in the **Sender** field. The **Job Description** field lists the job detail (it is recommended not to change this information). If you would like to type a personal message to appear in the customer's email, type the text in the **Personal Message** field.

Delivery Confirmation

Delivery Confirmation allows you to send a confirmation email message to a customer automatically when an order is marked Delivered. If you have Wireless Delivery Confirmation, drivers mark orders Delivered on wireless phones while they are on route. If you do not have Wireless Delivery Confirmation, drivers mark orders Delivered when they return from the delivery trip.

You can send three types of delivery confirmation email messages: local delivery, outgoing delivered, and outgoing delivered with an Answer message received from the filling florist. In Mercury Administration, you can select different templates for each order type.

Table 9-25: Confirmation Email Types

Confirmation Email Type	Description
Local Delivery	Delivery confirmation email messages are sent for local delivery orders when orders are marked Delivered in the Mercury Delivery application, Ticket Search, or in the delivery information section of the order.
Outgoing Delivered	For outgoing orders, delivery confirmation email messages are sent when the order is marked Delivered in the Mercury Delivery application, Ticket Search, or in the delivery information section of the order.
Outgoing Delivered with ANS Received	If an ANSwer message is received back from a filling florist, you can select a different email template to use. You may want to use a different template that states that you received a confirmation from the filling florist. The delivery confirmation email is sent when the order is marked Delivered in the Mercury Delivery application, Ticket Search, or in the delivery information section of the order.

Delivery confirmation email messages are sent immediately if you are already connected to the Internet, or if you are not connected, email messages are sent when the polling interval expires (by default, every 20 minutes). To change the polling interval, see [Mercury Connection Screen](#) on page 24-34.

Required Configurations for Delivery Confirmation

Before you can send delivery confirmations, you need to configure several settings:

Set Up an Internet Connection

Set up an Internet connection in Mercury Administration. You must have an Internet connection to send email. You can use any type of Internet connection (dial-up [AOL only], DSL, etc.), as long as you can connect. If you do not already have an Internet connection, see [Internet Screen](#) on page 24–29 to learn how to set it up.

If you are using a dial-up connection, you must specify which phone line is used for the Internet. See [Phone Lines Screen](#) on page 24–36 to learn how to set up this information.

Configure ISP Information

Set up your ISP information in Mercury Administration. If you do not already have access to the Internet, you have to sign up with an ISP company. You can do this on your own, or the FTD Mercury Assistance Center at 1-800-669-1000 can help you (you can sign up with FTD's ISP service, FTD InternetLink). An ISP is a company that provides you with the software or access information that enables your computer to connect to the Internet. If you can connect to the Internet, you are already using an ISP.

After signing up with an ISP, you must set up FTD Mercury with your Internet and outgoing mail server information for that ISP. See [Internet Screen](#) on page 24–29 and [MailServer Screen](#) on page 24–30 to learn how to set up this information.

Create Delivery Confirmation Email Templates

Create your delivery confirmation email templates in the FTD Document Center. Before you can send a delivery confirmation email, you must create at least one email template. The template includes the email text that you want to send to the customer, and can also include graphics and order/customer information. See [FTD Document Center](#) on page 23–1 for more information.

Select Delivery Confirmation Templates and Set up Default Email Settings

Select your delivery confirmation templates and set up your default email settings in Mercury Administration. When you are finished creating your email templates, you must select which template to use for outgoing and local delivery orders. Also, there are many other defaults that you must set up, like your reply email address, or whether you want to send confirmations NOW or a specified LATER time. See [Email Screen](#) on page 24–24 for more information.

Sending Delivery Confirmation Email Messages

After you have set up your system as indicated in [Required Configurations for Delivery Confirmation](#) on page 9–73, you are ready to send delivery confirmation email messages. To send a delivery confirmation in Order Entry or Point of Sale, click **Delivery Info** to enter the delivery confirmation information. If the customer is set up to receive delivery confirmation email messages (Delivery Confirmation is checked in the General tab of the Customer Detail Information window for the customer), and you have selected the delivery zone for the order, the delivery confirmation fields are active.

If the customer has an email address on file and you have a template selected for local and/or outgoing deliveries in the **Email** screen in Mercury Administration (see [Email Screen](#) on page 24–24), then the information should be completed for you automatically. If the information is not complete (for example, you were warned when saving that there is no email address on the customer account), complete the information in this section of the screen as necessary.

For more information, see [Delivery Information Window](#) on page 9–87.

The email is sent when the order is marked Delivered. Orders can be marked Delivered in three ways:

- » In the Mercury Delivery application (manually or by phone) if you purchased the Mercury Delivery module (see [Truck Return](#) on page 14–28).
- » In Order Entry or Point of Sale (see [Marking Orders Delivered in Order Entry](#) on page 9–74).
- » In Ticket Search, if you change the value of the Delivery column for a ticket.

NOTE In Mercury Administration, you have the option to send delivery confirmation email messages NOW or LATER. If you selected LATER, a later time was specified. See [Email Screen](#) on page 24–24 for details.

To verify that the email was sent, check the **Email** tab of the Fax & Email Monitor (see [Fax & Email Monitor Application](#) on page 22–1).

Automatically Sending Delivery Confirmation ANS Messages

In addition to emailing customers who place orders with you, you can also send a Delivery Confirmation (ANS) message back to a sending florist for wire in orders. This lets the sending florist know their order has been delivered.

TASK To configure FTD Mercury to automatically send a Delivery Confirmation (ANS) message to sending florists when orders have been delivered:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Customer**. The **Customer Search** window opens.
- 2 In the **Customer Name** field, enter **FTD**.
- 3 Click **Search**.
- 4 From the results list, double-click the FTD house account. The **Customer Detail Information** window opens, displaying the **General** tab.
- 5 Ensure the **Delivery Confirmation** check box is selected.
- 6 Click **Save**.

From now on, for all attached incoming wire orders, when you mark the order as delivered in Ticket Search, in Ticket Status, or in Mercury Delivery, a Delivery Confirmation (ANS) message will be sent to the filling florist.

Marking Orders Delivered in Order Entry

If you have Mercury Delivery, the best place to maintain delivery status is from there. However, if you do not use Mercury Delivery, you can also change delivery status via the Ticket Status window.

TASK To mark an order as delivered from the Ticket Status window:

- 1 Use Ticket Search to locate the ticket and open it in Order Entry.
- 2 Click **Status**. The Ticket Status window opens.
- 3 In the Delivery area, click the Edit button.
- 4 From the Status list, select **Delivered**.
- 5 Click **Save** to save your changes.
- 6 Click **Escape** to close the Ticket Status window.
- 7 Click **Update** to update the order (and save your Ticket Status changes).

Marking Orders as Delivered in Ticket Search

You can also mark orders as delivered in Ticket Search.

TASK To mark an order as delivered in Ticket Search:

- 1 On the **FTD Mercury Main Menu**, in the **Search** area, click **Ticket Search**. The **Ticket Search** window opens.
- 2 Enter search criteria to locate the ticket and click **Search**.
- 3 In the results list, click in the **Delivery** column for the ticket you want to mark delivered and select **Delivered**.

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

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

Processing Refunds & Exchanges

From time to time, you may need to issue a refund when a customer returns an item (or an entire order). You may also have to handle when a customer wants to exchange an item for another item, often costing different amounts. There are two types of refunds: one-click refunds and standard refunds.

One-click refunds are typically much faster to perform than standard refunds, and have the added benefit of associating the refund with the original sale and the original sale with the refund. That being said, there are limitations on when you can use one-click refunds. The sale cannot be incomplete, pending, or cancelled. The sale or ticket cannot contain an item with a statement category of coupon. The original ticket cannot be a zero-amount sale, a debit memo, a credit memo, or a payment. Fortunately, the vast majority of sales you make will not have any of these limitations, and so you will be able to create a one-click refund for them. One-click refunds also remove orders from production if the order has not been delivered. If a refund is created prior to the order being delivered, the original order will not display in Mercury Delivery. (If you want to refund an order but the original ticket should still remain in production, the refund should be created manually using a new sale-based refund.)

New sale-based refunds involve creating a new sale to create a refund. You then can enter the returned items with refund indicators. In some circumstances, you can copy the existing sale and use that as a starting point for the refund. Standard refunds do not link the original sale to the refund. Typically, you should only perform standard refunds if you cannot perform a one-click refund or if a customer is returning only one or two items from an order that had many items. In the latter case, although you could perform a one-click refund, it may be more time consuming to remove all of the items the customer is not returning from the refund sale.

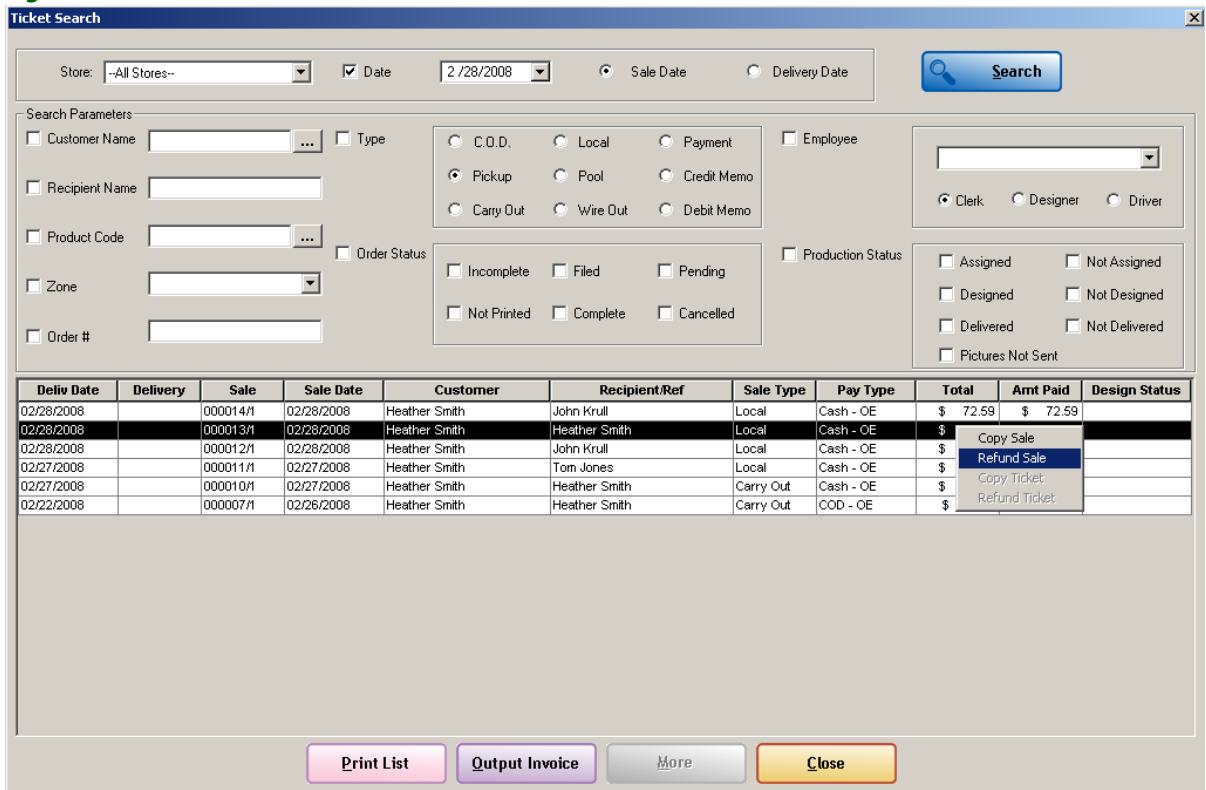
Additionally, the original ticket cannot be a zero-amount sale, a debit memo, a credit memo, or a payment.

Refunds and Ticket Search

Ticket Search displays original sales and sales that have been refunded. If you use a one-click refund on an order, the refund sale will display the associated sale number in the Recipient/Reference column (as long as you do not change the recipient name when creating the refund). The text that displays reads Refund of Sale <Original Sale ID>. Once a refund is completed, the original sale used to create the refund is highlighted in light blue in Ticket Search.

NOTE You can also perform refunds by creating a new sale. For more information, see [New Sale–Based Refunds and Exchanges](#) on page 9–79.

Figure 9-18: One-Click Refunds from Ticket Search



Refunding Entire Sales with One-Click Refunds

You can perform a one-click refund on most sales to refund the entire sale. You cannot, however, perform a one-click refund on a sale that contains an item with a statement category of coupon. If you attempt a one-click refund and the option to refund the sale is not available, this may be the reason.

TASK **To refund an entire sale using a one-click refund:**

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and click **Refund Sale**.
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This sale contains all items and tickets in the original sale you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.
- 4 Verify the items that are being refunded.
- 5 Click **Complete**. The **Payments** window opens.
- 6 Verify the payment information and type. You may need to change the payment type depending on how you want to issue the refund.
- 7 Click **Complete**.

Depending on the payment type, the customer’s house account is refunded, the customer’s credit card is refunded, or the cash drawer opens so you can refund the customer using cash.

Refunding Single Tickets with One-Click Refunds

If you have a multi-ticket order, you can use a one-click refund to refund a single ticket rather than the entire sale. You still cannot refund a ticket that contains an item with a statement category of coupon.

TASK To refund a single ticket in a multi-ticket sale using a one-click refund:

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and click **Refund Ticket**.
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This refund sale contains the contents of the ticket you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.
- 4 Verify the items that are being refunded.
- 5 Click **Complete**. The **Payments** window opens.
- 6 Verify the payment information and type. You may need to change the payment type depending on how you want to issue the refund.
- 7 Click **Complete**.

Depending on the payment type, the customer's house account is refunded, the customer's credit card is refunded, or the cash drawer opens so you can refund the customer using cash.

Partial Refunds of Sales with One-Click Refunds

In addition to refunding an entire sale using a one-click refund, you can also refund some items in a sale. Essentially, it is the same procedure, however, you need to remove the items the customer is not returning from the refund sale. You cannot use one-click refunds for sales containing items with a statement category of coupon.

TASK To issue a partial refund of a sale using a one-click refund:

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and click **Refund Sale**.
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This sale contains all items and tickets in the original sale you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.
- 4 For each ticket in the sale, remove the items from the product grid that are not being returned. To do so, right-click on an item and click **Remove**.
- 5 Verify the remaining items that are being refunded.
- 6 Click **Complete**. The **Payments** window opens.
- 7 Verify the payment information and type. You may need to change the payment type depending on how you want to issue the refund.
- 8 Click **Complete**.

Depending on the payment type, the customer's house account is refunded, the customer's credit card is refunded, or the cash drawer opens so you can refund the customer using cash.

Partial Refunds of Single Tickets with One-Click Refunds

You can also use one-click refunds to refund part of a ticket from a multi-ticket sale. You simply remove the items from the refund sale that the customer is not returning. You cannot use one-click refunds for tickets containing items with a statement category of coupon.

TASK To issue a partial refund of a single ticket of a multi-ticket sale using a one-click refund:

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and click **Refund Ticket**.
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This sale contains all items in the original ticket you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.
- 4 Remove the items from the product grid that are not being returned. To do so, right-click on an item and click **Remove**.
- 5 Verify the remaining items that are being refunded.
- 6 Click **Complete**. The **Payments** window opens.
- 7 Verify the payment information and type. You may need to change the payment type depending on how you want to issue the refund.
- 8 Click **Complete**.

Depending on the payment type, the customer's house account is refunded, the customer's credit card is refunded, or the cash drawer opens so you can refund the customer using cash.

Handling Exchanges with One-Click Refunds

You can also use one-click refunds to handle exchanges. When a customer wants to return one or more items and wants to replace them with other items that may not cost the same, you can use this procedure. Like other one-click refund operations, you cannot use this procedure if the original sale or ticket contains items with a statement category of coupon.

If the exchange results in money being owed to the customer, the exchange will be linked to the original sale. However, if the customer owes money after the exchange, the exchange will not be automatically linked to the original sale (because of this, you should add order notes including the original sale ID so you can determine the original sale for this refund).

IMPORTANT You should not use a one-click refund for an exchange that involves a new delivery or wire out order. For this situation, perform the refund separately and then enter the new order as you normally would.

TASK To perform an exchange using a one-click refund:

- 1 Perform a **Ticket Search** to locate the original ticket. You should perform the **Ticket Search** from where the order was entered—either in Order Entry or Point of Sale—by clicking **Lookup**.
- 2 When you have located the ticket in the **Ticket Search** window, right-click on the ticket in the results list and either click **Refund Ticket** or **Refund Sale**, depending on whether the items the customer is returning are from a single ticket in a multi-ticket sale (if it is a multi-ticket sale and all refunds are on one ticket, use **Refund Ticket**, otherwise use **Refund Sale**).
- 3 FTD Mercury creates a refund sale in Order Entry or Point of Sale, depending on where you performed the **Ticket Search**. This sale contains all items in the original ticket you selected. If it is possible to remove items from production (that is, they have not been delivered already), you are prompted to remove them. If you select no, you cannot continue with the refund.

- 4 For each ticket in the sale, remove the items from the product grid that are not being returned. To do so, right-click on an item and click **Remove**.
- 5 Add new items to the product grid as you normally would.
- 6 Click **Complete**. The **Payments** window opens.
- 7 Verify the payment information and type. You may need to change the payment type. If the new items cost less than the returned items, you will issue a refund to the customer. If the new items cost more, the customer will need to pay you the difference.
- 8 Click **Complete**.

If a refund is issued, depending on the payment type, the customer's house account is refunded, the customer's credit card is refunded, or the cash drawer opens so you can refund the customer using cash. If the customer owes you, depending on the payment type, the customer's house account is charged, the customer's credit card is charged, or the cash drawer opens for you to accept the customer's cash or check.

New Sale–Based Refunds and Exchanges

The other type of refund you can perform is a new sale–based refund. Essentially, this is a negative-value sale, where you create a new sale and check the refund indicators in the product grid. This results in you owing the customer a refund, whether it be in cash, as a credit to their house account, or as credit back to their credit or debit card.

One situation where you must use a new sale–based refund is when the original sale contains a coupon. You might also use it if a customer is purchasing several items and only returning one item. One potential issue with new sale–based refunds is that there is no link between the original sale and the returned item. You can mitigate this by entering the original sale ID in the order notes for the new sale.

Refunds and Wire Out Orders

You cannot issue a refund for an order that has a wire out delivery zone, either using one-click refunds or new sale-based refunds. You must pick a different delivery zone for the order. When a one-click refund is created for a wire out order, the delivery zone is automatically changed to N/A. Refunds cannot be completed if the delivery zone is set to a wire out zone.

When one-click refunds are created, the fees and taxes associated with the original order are retained for the refund.

Refund Window

Figure 9-19: Refund Window

Marketing

Referral Code:

Payments

Type	Account Number	Exp Date	Name	Approval	Amount
House	0000024				\$ 1,282.79
House	0000024				\$ 0.00

Remove

Cardholder Present:

Sub. Total: \$ 1204.80
Sales Tax: \$ 77.99
Total: \$ 1282.79
Amount Refunded: \$ 0.00
Cash Due: \$ 0.00

Complete Save Escape

The Refund window is essentially the same as the Payments window, except you are providing a refund for returned merchandise.

TASK To complete the Refund window:

- 1 If the refund will be given as a payment on a house account, you will need to fill in the customer information:
 - » For a new customer, click **Add** to open the **Customer Detail Information** window, where you can fill in the **General**, **House Account**, and **Custom** tabs, before clicking **Save** and returning to the **Order Entry** window.
 - » For an established customer, type the customer's name and click **TAB** so that the system can locate the customer's information, or click ... to perform a **Customer Search**. Once you have located the customer's information in the **Customer Search** window, click **Select** so the customer information will fill in the top part of the **Payment** window automatically. You may click in the **Address Information** and **Phone Information** areas to view other addresses and phone numbers that may have been entered for this customer.
- 2 In the **Payments** area, indicate the type of refund. The **Cash Due** field will indicate the amount of cash to give to the customer. This field will usually equal the **Amount Refunded** and **Total** fields, unless the refund is being given in a different payment type. The **Amount Refunded** and **Total** fields should be equal at the completion of the refund.
- 3 Click **Complete** to complete the refund.

Additional Order Tasks & Windows

In addition to entering and attaching orders, you can perform many other tasks relating to order entry and editing orders. These tasks include:

- » [Copying Tickets in Order Entry and Point of Sale](#)
- » [Removing Individual Tickets from Sales](#)
- » [Using Bar Codes](#)
- » [Editing Existing Orders](#)
- » [Cancelling Orders](#)
- » [One-Off Printing](#)
- » [Editing an Order from History](#)
- » [Card Messages and Font Sizes](#)
- » [Sending a Card to Multiple Recipients](#)

Additionally, you can access other windows from Order Entry and Point of Sale. These windows include:

- » [Ticket Status Window](#)
- » [Delivery Information Window](#)
- » [Map It Window](#)
- » [Cancel Confirmation Window](#)
- » [Multiple Recipients Window](#)
- » [Cancel or Void Order Window](#)

Copying Tickets in Order Entry and Point of Sale

In both Order Entry and Point of Sale, you can duplicate a ticket within the sale. This is useful if you have identical (or nearly identical) orders being sent to different recipients from the same customer.

TASK To duplicate a ticket in Order Entry or Point of Sale:

In the **Order Entry** or **Point of Sale** window, right-click on the ticket tab at the bottom of the order and click **Copy**. The ticket is duplicated exactly. Click on the new ticket and edit it as you normally would.

You cannot have more than 50 individual tickets in a sale.

Removing Individual Tickets from Sales

You can remove individual tickets from a multi-ticket order in both Order Entry and Point of Sale. However, you cannot remove a ticket once payment has been received on an order (unless the sale is paid by house charge).

IMPORTANT If you remove a ticket from a sale, the ticket is removed, not canceled. There will be no record that the ticket you removed ever existed.

TASK To remove a ticket from an order that contains multiple tickets:

- 1 From the **Order Entry** or **Point of Sale** window, right-click on the tab of the ticket you want to remove and click **Remove**.
- 2 Confirm the ticket removal.

Once you have removed a ticket, the payment amount is updated to reflect the new order amount.

Using Bar Codes

You can scan products in the Order Entry and Point of Sale with a bar code scanner. To scan a bar code, your cursor must be in the Product Code field. When you scan the bar code, FTD Mercury checks to see if there is a product in the database that is associated with that bar code. If the system finds a match, the Product Code, Qty, and Description fields fill in automatically. If the bar code has a default price associated with it, the Amount field also fills in. If there is no default price specified, you have to enter the price manually.

If you scan a bar code that is not in the system, a window pops up asking if you want to create a new product with the scanned bar code. Click **Yes** to enter the bar code into the system, or click **No** to enter a different product code.

You may also perform product searches by typing in the full bar code for a product.

For more information on setting up, scanning, and printing bar codes, see [Bar Codes](#) on page 8–14.

Editing Existing Orders

Once you perform a Ticket Search and select a ticket, you can edit the ticket in Order Entry or Point of Sale.

TASK To edit an existing order:

- 1 On the **FTD Mercury Main Menu**, either click **Order Entry** or **Point of Sale**.
- 2 Click **Lookup**. The **Ticket Search** window opens.
- 3 Enter search criteria to locate the ticket and click **Search**.
- 4 From the results list, double-click on the ticket you want to edit. It opens in **Order Entry** or **Point of Sale** (depending on where you opened **Ticket Search**).
- 5 Edit information as needed.
- 6 Click **Update** to save this order and close this window.

Cancelling Orders

When you cancel an order, the amount is refunded to the customer's house account or credit card. If the sale was a cash sale, cash is refunded back to the customer.

Cancelling Orders in Order Entry

TASK To cancel an order in Order Entry:

- 1 On the **FTD Mercury Main Menu**, click **Order Entry**. The **Order Entry** window opens.
- 2 Click **Lookup**. The **Ticket Search** window opens.
- 3 Enter criteria to locate the order and click **Search**.
- 4 Double-click the order you want to cancel from the results list. It opens in Order Entry. Click **Cancel Order**.
- 5 When the Are you sure you want to cancel this order? message appears, click **Yes**.
- 6 When the empty **Order Entry** window reappears, the order has been cancelled.

Cancelling Orders in Point of Sale

TASK To cancel an order in Point of Sale:

- 1 On the **FTD Mercury Main Menu**, click **Point of Sale**. The **Point of Sale** window opens.
- 2 Click **Lookup**. The **Ticket Search** window opens.

- 3 Enter criteria to locate the order and click **Search**.
- 4 Double-click the order you want to cancel from the results list. It opens in **Point of Sale**.
- 5 Click **Void Order**. The **Cancel or Void Order** window opens.
- 6 Enter your employee name and password. Click **OK**.

IMPORTANT Only authorized employees may void orders.

- 7 The **Refund** window opens, displaying the amount to be refunded and how the refund will be issued (back on a credit card, on a house account, or cash).
- 8 Click **Complete**.

If the refund was issued in cash, the cash drawer will open. Provide the customer the correct amount for the refund.

One-Off Printing

When you create an order, cards and/or forms print according to settings in Mercury Administration. However, you can also print one-off forms and cards from Order Entry and Point of Sale. This allows you to replace lost or damaged forms, and in multi-store environments you can print invoices to another store.

Printing a One-Off Form for an Existing Sale

Prior to printing a one-off form or card, you must have the Order Entry or Point of Sale window open. Perform a Ticket Search to locate the sale.

TASK To print a one-off form or card for an existing sale:

- 1 Perform a **Ticket Search** to locate the existing sale.
- 2 From the **Order Entry** or **Point of Sale** window, with the order open, click **Printer**. The **Output Options** window opens.
- 3 Ensure the **Print Invoice** option in the **Print Output** area is selected, and the **Fax** option (in the **Fax Output** area) and the **Email** option (in the **Email Output** area) are cleared.
- 4 By default, the store selected in the **Store Name** list is the currently logged in store. In a multi-store environment, you can select another store to print the forms to another store.
- 5 If you have multiple tickets in this order, from the **Ticket** list, select the ticket you want to print, or click **ALL** to print all tickets.
- 6 From the **Form** list, select the form you want to print.
- 7 From the **Printer Name** list, select the printer where you want to print the form, and from the **Printer Tray** list, select the printer tray on the selected printer that holds the paper you want to use. The default for these lists are based on the form you selected; if no default printer exists for this form, both the **Printer Name** and **Printer Tray** lists will be blank by default.
- 8 Click **Execute**.

The form you selected for the sale selected prints according to the settings you selected. When a form is printed a second (or subsequent) time, the form will indicate the number of times it has been printed.

Printing a One-Off Form for a New Sale to Another Store

FTD Mercury also allows you to set one-off printing options for a new sale. The only scenario you should use this for is in a multi-store environment where you want to print an order placed at one store at another store. For example, if a customer comes to your East Side store and wants to place an order for delivery in an area served by your West Side store, you can print the order invoice and working invoice to your West Side store automatically.

TASK To print invoices associated with a new sale to another store:

- 1 In the **Order Entry** or **Point of Sale** window, before you click **Complete**, click **Printer**. The **Output Options** window open.
- 2 Ensure the **Print Invoice** option in the **Print Output** area is selected, and the **Fax** option (in the **Fax Output** area) and the **Email** option (in the **Email Output** area) are cleared.
- 3 From the **Store Name** list, select the store where you want to print the invoice(s).
- 4 Click **Save**. You are returned to Order Entry or Point of Sale. Complete the order as usual.

IMPORTANT If you change the zone after you have configured to print at a different store, you will need to repeat the procedure.

When you complete the order, forms are printed at the selected store according to the default settings in Mercury Administration for that store.

FTD recommends you contact your other store to ensure the invoices printed as expected.

Editing an Order from History

In some cases, you may be able to make price, payment, recipient, and/or card changes on an order. Please refer to the following grid for guidelines regarding when you can modify cost and payment information on a ticket. If the ticket included a Mercury Order, it may not be changed without sending an ASK message to get permission from the other florist. If you are unable to change the order, you must issue a credit memo to the customer's house account, or issue a credit card refund.

Table 9-26: Changing and Canceling Completed Orders in Order Entry

Entered In	Recalled In	Before/ After Z-out	POS Terminal	Cash/ Check/Gift Certificate Sale	CC Approved not Settled	CC Declined	CC Settled	House Prestatement	House on Statement House with payment applied	In GL Batch
OE	OE	N/A	N/A	yes	yes	yes	no	yes	no	no
POS	POS	Before	Original	yes*	yes†	yes†	no	yes†	no	no
POS	POS	Before	Other	no‡	no‡	yes†	no	yes†	no	no
POS	POS	After	Original	no‡	no‡	yes†	no	no	no	no
POS	POS	After	Other	no‡	no‡	yes†	no	no	no	no
OE	POS	N/A	N/A	yes	yes	yes	no	yes	no	no
POS	OE	Before	N/A	no	no	no	no	yes**	no	no
POS	OE	After	N/A	no	no	no	no	yes**	no	no

* Cannot change customer, price, or cash/check/gift certificate payments.

† Credit payments may be changed if they are unsettled, and House Charge payments may be changed if there has been no payment applied and no statement generated. Cash, check, and gift certificate payments may not be changed.

‡ Cancels and Voids are allowed.

**Cannot be cancelled or voided, and non-house payment types may not be added or changed.

Card Messages and Font Sizes

The default font size for card messages is 16 point, which is perfect for most card messages. You can change the font size for cards in Mercury Administration (see [Store Settings Screen](#) on page 24–60).

There may be an instance when a customer wants to include a very long card message on the card. For example, the default 16 point font may be too large to fit on the card. If the font size is too large for the long card message to fit on the card, you receive a message similar to this:

The Card Message is currently 23 lines with a font size of 16 points. This is too large and will print over the guarantee on the invoice. The suggested font size for your card is 6 points. Would you like to change to this font size?

Click **Yes** to accept the font size change so that the card message fits on the card. If you click **No**, the printed message exceeds the size of the card. You may then have to hand write a card for the customer. If you click **Cancel**, you return to the Order Entry or Point of Sale window without accepting changes.

Sending a Card to Multiple Recipients

TASK To create an enclosure card for multiple recipients:

- 1 Enter an order in Order Entry or Point of Sale as you would normally.
- 2 In the **Card** area, enter the card message or use abbreviation codes.
- 3 Click **Add Recipients**. The **Multiple Recipients** window opens.
- 4 Enter the name of each recipient that will receive this card. As you add each name, a new line appears for the next recipient.
- 5 When you finish adding recipients, click **Save** to return to the **Order Entry** or **Point of Sale** window.

Ticket Status Window

Figure 9-20: Ticket Status Window

The screenshot shows the 'Ticket Status' window with the following fields and values:

- Ticket Number:** 000446/1
- Updated:** Friday, March 28, 2008 07:20 AM
- Printed Copy #:** 1
- Printer:** Microsoft Office Document Imag
- Time:** Friday, March 28, 2008 08:48 AM
- Designer Status:** (empty)
- Designer:** (empty)
- Date Designed:** (empty)
- Delivery Status:** 01-Delivered
- Route:** (empty)
- Date:** Fri, Mar 28, 2008 1:00 PM
- Driver:** (empty)
- Edit button:** (grey)
- Status Received from Filling Florist:** (empty text area)
- Save button:** (green)
- Show GPS button:** (pink)
- Escape button:** (orange)

The Ticket Status window is accessible for local and wire out orders once the order has been entered (that is, you cannot access Ticket Status during the order entry process).

Ticket Area

This non-editable area contains the following information:

Table 9-27: Ticket Area Fields

Field	Description
Number	The ticket number (including the Sale ID).
Updated	The day, date, and time when the ticket was last updated.

Printed Area

This non-editable area contains the following information:

Table 9-28: Printed Area Fields

Field	Description
Copy #	The number of times the ticket has been printed.
Printer	The printer where the ticket was last printed.
Time	The last time the ticket was printed.

Designer Area

This non-editable area contains the following information:

Table 9-29: Designer Area Fields

Field	Description
Status	The current design status.
Date	The day, date, and time the ticket was assigned to a designer.
Designer	The designer assigned to the ticket. Designers are assigned in the Design Center.

The designer status is not updated until all products on the ticket have been assigned or designed.

Delivery Area

This area contains delivery details for the order.

Table 9-30: Delivery Area Fields

Field	Description
Status	The delivery status for the order.
Date	The order's delivery date.
Route	The order's route.
Driver	The route's driver.

Click the Edit button to change Delivery status.

Button Ribbon

The button ribbon at the bottom of the window contains the following buttons:

Table 9-31: Ticket Status Button Ribbon

Button	Description
Save	Saves any changes you made.
Show GPS	If you are licensed for Wireless Delivery with GPS, displays the current location of your driver.
Escape	Closes the window.

Delivery Information Window

Figure 9-21: Delivery Information Window

The screenshot shows a window titled "Delivery Information" with a close button (X) in the top right corner. Inside the window, there is a section labeled "Confirmation Detail". Under this section, there are three fields: "Send Confirmation:" with a checked checkbox, "Template:" with a dropdown menu showing "DeliveryConf", and "Email Address:" with a text box containing "bernicebutterworth@comcast.net". At the bottom of the window, there are two buttons: "Save" and "Escape".

When you click the Delivery Confirmation button in the Delivery area of Order Entry or Point of Sale, the Delivery Information window opens. In this window, you can specify whether you want to send a delivery confirmation email message to a customer, the template to use for the confirmation, and the customer's email address.

Depending on settings for the customer (that is, if the Delivery Confirmation option is selected in the General tab of the Customer Detail Information window), the Send Confirmation option may be selected and the Email Address field may already be filled in when you open this window.

Table 9-32: Delivery Information Window Settings

Setting	Description
Send Confirmation	<p>This box should be checked if the customer is set up to receive delivery confirmations (Delivery Confirmation is checked in the General tab of the Customer Detail Information window for the customer). If it is not checked and you would like to send a delivery confirmation email message, check this field.</p> <p>If the order is an incoming order and you check Send Confirmation, a delivery confirmation message will be sent to the sending florist when the order is marked delivered.</p>

Table 9-32: Delivery Information Window Settings (cont.)

Setting	Description
Template	The template that you selected as the default template for the given delivery type in Mercury Administration will display here. To select a different template, click the down arrow and select the email template you would like to use. Templates are maintained in the FTD Document Center.
Email Address	If the customer has an email address saved on his or her account, it will display here. Change or type the email address in this field if necessary. The email address you type here is only valid for the order; it will not be saved on the customer account.

NOTE The Delivery Confirmation button is only enabled when the zone is a deliverable zone (that is, not for carry out, pickup, or wire out orders).

Click Save to save your changes, or Escape to close the window without sending changes.

Map It Window

When you click the Map It button in Order Entry or Point of Sale, the Map It window opens. This window displays the recipient address and the distance in miles (or kilometers, for Canadian systems) from your shop to the recipient. It also provides a map showing your shop location and The Map It button is always enabled, but you may receive messages if you do not have required licenses or software.

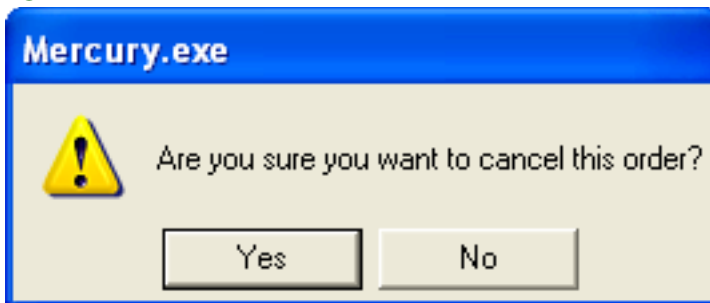
- » If you are not licensed for Address Verification, a message displays with information about purchasing a license.
- » If Microsoft MapPoint is not installed, a message displays with information about purchasing a MapPoint license.
- » If your zone is not a local zone, a message displays informing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

Once you have finished viewing the information in this window, click Escape to close the window and return to Order Entry or Point of Sale.

TIP If you do not have MapPoint installed, as long as you have address verification and the location of your shop is verifiable in the Florist Directory, the distance between the verified recipient address and the current Transfer To store is displayed directly below the Map It button in Order Entry and Point of Sale.

Cancel Confirmation Window

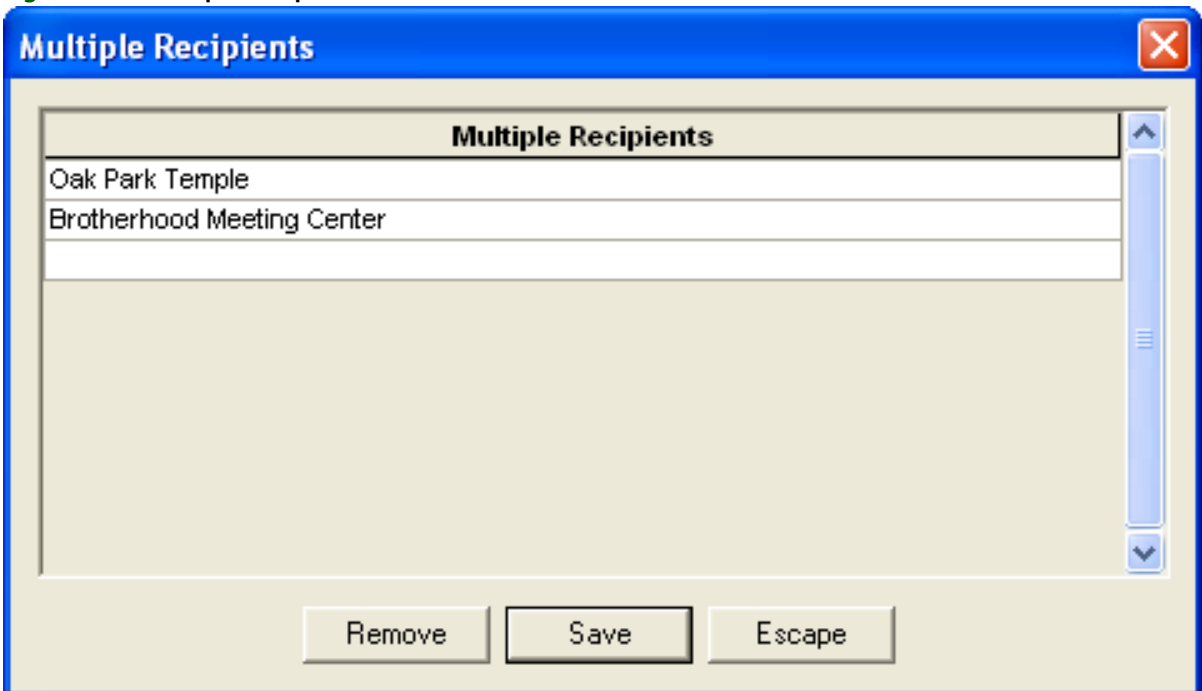
Figure 9-22: Cancel Confirmation Window



If you select to cancel an order in either the Order Entry window or Point of Sale window, a message will appear asking you to confirm the cancellation. Click Yes to cancel the order, or click No to return to the previous screen without canceling.

Multiple Recipients Window

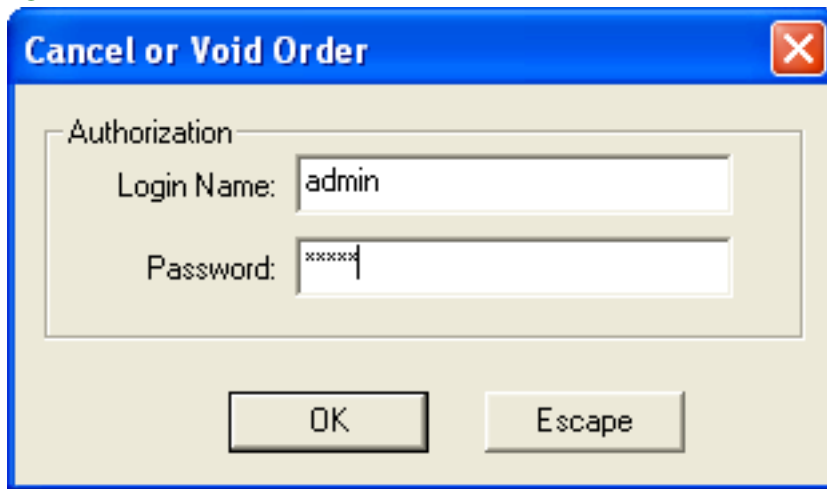
Figure 9-23: Multiple Recipients Window



The **Multiple Recipients** window allows you to send the same card to several recipients without having to retype the same card message. You may need to use this window within the **Order Entry** window when sending several recipients the same card.

Cancel or Void Order Window

Figure 9-24: Cancel or Void Order Window



The image shows a software window titled "Cancel or Void Order" with a blue title bar and a red close button. Inside the window, there is a section labeled "Authorization" containing two text input fields. The first field is labeled "Login Name:" and contains the text "admin". The second field is labeled "Password:" and contains six asterisks "*****". Below these fields are two buttons: "OK" and "Escape".

Only authorized employees may perform cancels or voids. To confirm you are authorized, enter your login name and password, and click **OK** to continue.

Automated Order Interface

The Automated Order Interface allows you to receive orders from other wire services as incoming Mercury orders in FTD Mercury. Incoming orders from other wire services are automatically routed to FTD Mercury. You then process the order as you would process any other incoming Mercury order.

Contact Mercury Technology Sales at 1-800-767-3222 or email TechSales@FTDi.com to purchase this feature.