

DAC

User Guide

Customer File Maintenance

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Getting Started

The Customer Related File Maintenance applications are used to create and maintain the following:

- Job titles
- Employee records
- Terms definitions
- Route definitions
- Account types
- Sales group definitions
- Billing matrix definitions
- Retail matrix definitions
- Corporate level definitions
- Demographic areas
- Customer records
- Customer options.

Refer to the Tax System document for information about creating and maintaining:

- State, County and City Codes
- Tax Jurisdictions.

1. Users begin customer-related file maintenance by selecting option 1 (File Maintenance Menu) from the Main Operations Menu. The File Maintenance screen appears.

```
User: JEANNINE           Menu: FMCV1           Date: 8/07/12
======> F I L E   M A I N T E N A N C E <=====
=====
|||||      1. Customer Related Maintenance
THE  ||      2. Product Related Maintenance
DAC  ||      3. Billing Related Maintenance
SYSTEM ||      4. System Options Maintenance
|||||      5. Inquiry Options
      6. Price Maintenance
      7. G/L Interface Maintenance
      8. Scan Code Maintenance

                                M E N U   C A L L S
19. Deletions                    20.
22.                               23. Dac Main Menu      21. Reports
                                90. Sign Off

=====
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==>
```

2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.

```

User: JEANNINE          Menu: CRM1CV1          Date: 8/07/12

===== > C U S T O M E R   R E L A T E D #1 <=====
=====
|||||
THE   ||          1. Work With Corporates/Customers
DAC   ||          2. Work With Customers
SYSTEM ||          3. Work With Employees
|||||           4. Job Title Definitions
|||           5. Corporate Level Definitions
||           6. Account Type Definitions
||           7. Terms Definitions
||           8. Demographic Areas
||           9. Route Master Definitions

M E N U   C A L L S
19. Customer Related #2  20. Tax System          21. Customer Reports
22. File Maintenance    23. Dac Main Menu       90. Sign Off

=====
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==>

```

3. When necessary, select option 19 (Customer Related #2) of the Customer Related #1 screen. The Customer Related #2 screen appears.

```

User: JEANNINE          Menu: CRM2CV1          Date: 8/07/12

===== > C U S T O M E R   R E L A T E D #2 <=====
=====
|||||
THE   ||          1. Billing Matrix Definitions
DAC   ||          2. Retail Matrix Definitions
SYSTEM ||          3. Sales Group Master Definitions
|||||           4. Work With Customer Options
|||           5. Work With Customer Pick Options
||           6. Work With Customer Collections
||           7. Customer License Expirations
||           8. Work With Customer Delivery Messages
||           9. Work With Tote Charge Exemptions

M E N U   C A L L S
19. Customer Related #1  20. Tax System          21. Customer Reports
22. File Maintenance    23. Dac Main Menu       90. Sign Off

=====
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==>

```

Working With Job Titles

Job titles should be defined before the employee records are added.

The following instructions describe using the Edit Job Title Master screen to add a job title record to the Job Title Master file. Each record includes a unique job ID code consisting of a combination of any letters (*A* through *Z*) and numbers (*0* through *9*). The *Job Title Master already exists* message appears if a previously used code is entered.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.

```

User: JEANNINE           Menu: CRM1CV1           Date: 2/14/06

===== > C U S T O M E R   R E L A T E D # 1 < =====
=====
|||||||
THE   ||           1. Work With Corporates/Customers
DAC   ||           2. Work With Customers
SYSTEM ||         3. Work With Employees
|||||||           4. Job Title Definitions
                           5. Corporate Level Definitions
                           6. Account Type Definitions
                           7. Terms Definitions
                           8. Demographic Areas
                           9. Route Master Definitions

                           M E N U   C A L L S
19. Customer Related #2  20. Tax System           21. Customer Reports
22. File Maintenance    23. Dac Main Menu          90. Sign Off

=====
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===>

```

3. Select option 4 (Job Title Definitions) from the Customer Related #1 screen. The Edit Job Title Master screen appears with a list of job titles if any were previously defined.

```

DSAQEFR   CHANGE           Edit Job Title Master           2/14/06 10:14:21

Job Id .

Type options, press Enter.
D=Delete request

? Job Id      Job Title
  AP      Accounts Payable
  AR      Accounts Receivable
  DR      Driver
  SM      Sales Manager
  SP      Salesperson
  WW      Warehouse Worker

F3=Exit   F9=Go to 'Add' mode

```

4. Press <F9> (Go to 'Add' mode). The Edit Job Title Master screen is redisplayed without values for **Job Id** and **Job Title**.

```

DSAQEFR  ADD                               3/16/99 12:52:54
                                Edit Job Title Master

Type options, press Enter.
D=Delete request

?   Job Id      Job Title

+

F3=Exit  F9=Go to 'Change' mode

```

5. Enter a unique job title code for the **Job ID** (2,a) field.
6. Enter the job title for the **Job Title** (25,a) field.
7. Continue entering job title codes and job titles as necessary, and press <Enter> when data entry is complete.

```

DSAQEFR  ADD                               2/14/06 10:25:01
                                Edit Job Title Master

Type options, press Enter.
D=Delete request

?   Job Id      Job Title
    BY      Buyer

+

F3=Exit  F9=Go to 'Change' mode
                                CONFIRM: Y (Y/N)

```

8. Press <Enter> when prompted to confirm. The Edit Job Title Master screen is cleared.
9. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Employee Records

Employee records are added after job titles are defined. Each employee record includes a unique employee code consisting of a combination of any letters (*A* through *Z*) and numbers (*0* through *9*). The *Employee Master already exists* message appears if a previously used code is entered.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.

```
User: JEANNINE           Menu: CRM1CV1           Date: 2/20/06

===== > C U S T O M E R   R E L A T E D #1 <=====
=====
|||||||                1. Work With Corporates/Customers
THE  ||                2. Work With Customers
DAC  ||
SYSTEM ||            3. Work With Employees
|||||||                4. Job Title Definitions
                    5. Corporate Level Definitions
                    6. Account Type Definitions
                    7. Terms Definitions
                    8. Demographic Areas
                    9. Route Master Definitions

                    M E N U   C A L L S
19. Customer Related #2  20. Tax System           21. Customer Reports
22. File Maintenance    23. Dac Main Menu          90. Sign Off

=====
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==>
```

3. Select Option 3 (Work With Employees) from the Customer Related #1 screen. The Work With Employee Record screen appears with a list of employee records if any were previously defined.
4. Press <F10> (Add New Record). The Edit Employee Master KEY SCREEN screen appears.

```
DSARE1R  ADD      Creative Data Research      2/20/06 10:44:42
                Edit Employee Master KEY SCREEN

Employee Number .

F3=Exit  F4=Search  F9=Go to 'Change' mode
```

5. Enter a unique employee code for the **Employee Number** (6,a) field, and press <Enter>. The Edit Employee Master Details screen appears.

```

DSARE1R   ADD      Creative Data Research      2/20/06 10:49:21
                Edit Employee Master Details

Employee Number . . . . . : RILEY
Manager Number . . . . .
Job Id . . . . .
Name . . . . .
Addr 1 . . . . .
Addr 2 . . . . .
City . . . . .
State . . . . .           Zip           Zip-Ext

Area Code . . .           Phone . . . . .
Dataline Area .           Dataline Phone .

Email 1
Email 2

F3=Exit   F4=Search   F12=Key screen

```

6. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:
- Optional: **Manager Number** (6,a) - employee code of the employee's supervisor. If necessary, press <F4> to select a code from the Select Employee Master screen.
 - **Job Id** (2,a) - job title code of the employee. If necessary, press <F4> to select a code from the Select Job Title Master screen.
 - **Name** (30,a) - the employee's name.
 - Optional: **Addr 1** (30,a) - street number and street name of the employee's address.
 - Optional: **Addr 2** (30,a) - remaining portion of the employee's address, such as post office box number.
 - **City** (30,a) - the city of the employee's address.
 - **State** (2,a) - the state of the employee's address.
 - **Zip** (5,n) - the zip code of the employee's address.
 - Optional: **Zip-Ext** (4,n) - the 4-digit extension of the zip code of the employee's address.
 - Optional: **Area Code** (3,n) - the area code of the employee's telephone number.
 - Optional: **Phone** (7,n) - the employee's telephone number.
 - Optional: **Dataline Area** (3,n) - the area code of the employee's telephone number used for data transmission.
 - Optional: **Dataline Phone** (7,n) - the employee's telephone number used for data transmission.
 - Optional: **Email 1 - Email 2** (70,a) - email addresses that can be used for sending pre-book notifications if outbound email functionality is enabled on the distributor's system. Refer to Emailing Pre-book Notifications of the System File Maintenance document for additional information.
7. Press <Enter> when data entry is complete.

```
DSARE1R  ADD  Creative Data Research      2/20/06 11:04:40
                Edit Employee Master Details

Employee Number . . . . . : RILEY
Manager Number . . . . .
Job Id . . . . . AR  Accounts Receivable
Name . . . . . RILEY MORGAN
Addr 1 . . . . .
Addr 2 . . . . .
City . . . . . PONCHATOULA
State . . . . . LA      Zip 70454 Zip-Ext

Area Code . . . . . Phone . . . . .
Dateline Area . . . . . Dateline Phone .

Email 1
Email 2

F3=Exit  F4=Search  F12=Key screen

CONFIRM: Y (Y/N)
```

8. Press <Enter> when prompted to confirm. The Edit Employee Master KEY SCREEN screen appears with the *Record added* message.
9. Continue adding employee records, or press <F3> to exit. The Work With Employee Record screen appears.
10. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Terms Definitions

The Terms Definitions application is used to designate the payment terms of vendors, and the payment terms and payment discounts for customers. If the DAC Accounts Payable (A/P) system is used, the payment terms records added for vendors must be duplicated using the Vendor Terms Maintenance screen of the A/P system. Refer to the Accounts Payable document for additional information.

Payment discount information can be printed on the bottom of customer invoices when any form except invoice form A is used. Refer to the DAC Default System Options document for information about the **Print Discount Info** field of the SYS031 default system option (Invoice Options).

Accounts Receivable batches can be automatically created for customers with terms age days of two or less. Refer to the DAC Default System Options document for information about the **Auto Create CASH Batches?** field of the SYS036 default system option (A/R Options).

Accounts Payable system users should refer to the DAC Default System Options document for information about the **A/P Terms Positions Used** field of the SYS005 default system option (Accounting Options).

The instructions which follow describe using the Edit Terms Descriptions screen to add a payment terms record. After the payment terms records are added, they must be linked to customer and vendor records. The value of the **Terms Code** field of terms records is entered for the **Terms Code** field of the customer records, and for the **Terms Code** field of the vendor records. Refer to Working With Customers below and the Vendors document for additional information.

1. Select option 7 (Terms Definitions) from the Customer Related #1 screen. The Edit Terms Descriptions screen appears.
2. If necessary, press <F9> (go to 'Add' mode) to add new records.

```

DSAZEFR  ADD      Creative Data Research      11/15/01 17:23:49
                        Edit Terms Descriptions

Type options, press Enter.
D=Delete request

? Terms Description          Age      Cash      Disc.      Late
  Code                      Days     Disc. %   Days       Days

F3=Exit  F9=Go to 'Change' mode

```

3. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:
 - **Terms Code** (3,a) - a code to designate the type of the payment terms, such as CS for cash and 20 for net due in 20 days.
 - **Terms Code Description** (25,a) - a description of the payment terms, such as Cash or Net 20 Days.

If the DAC Accounts Payable (A/P) system is used:

- The code entered for the **Terms Code** field must be entered as a 2-digit value when adding payment term records for vendors.
- Also, when adding the payment term records for vendors, the values of the **Terms Code** field *must be consistently entered* in either the two left most positions or the two right most positions of the **Terms Code** field as designated by the value entered for the **A/P Terms Positions Used** field of the SYS005 default system option.

It is recommended that when the two left most positions are used for vendors' payment term records, that the two right most positions are used for customers' payment term records, and vice versa. As illustrated below, it will be easier to distinguish between the two sets of records.

```

DSAZEFR  CHANGE Creative Data Research      11/15/01 17:24:34
                        Edit Terms Descriptions

Terms Code .

Type options, press Enter.
D=Delete request

? Terms Description          Age      Cash      Disc.      Late
  Code                      Days     Disc. %   Days       Days
CS      CASH                  1
7       NET 7 DAYS            7
14      NET 14 DAYS           14      4.00      7         14
21      NET 21 DAYS           21      4.00     10         21
30      NET 30 DAYS           30      4.00     10         30
DU      DUE ON RECEIPT        1
10      NET 10 DAYS           10
15      NET 15 DAYS           15
30      NET 30 DAYS           30

F3=Exit  F9=Go to 'Add' mode

```

4. If aging is based on terms, enter the number of days in which payment must be received before the customer (or the distributor) is considered past due for the **Age Days** (3,n) field. If *N* (for no) is entered for the **Term based A/R Aging** field of the SYS005 default system option, invoice dates and not the value of the **Age Days** field, are used for aging.
Refer to the DAC Default System Options document for additional information about the SYS005 default system option (Accounting Options). Refer to Working With Accounts Receivable Reports and Working With Statements of the Accounts Receivable document for information about the Aged Trial Balance report, Account Aging Analysis report and customer statements.
5. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:
 - Optional: **Cash Disc %** (5.2,n) - the payment discount percentage received.
 - Optional: **Disc Days** (3,n) field - the number of days within which payment must be received from the customer or by the vendor to qualify for a payment discount.
 - Optional: **Late Days** (3,n) - the number of days in which payment must be received before late charges can be generated for a customer. Refer to the Accounts Receivable document for information about late charges. No value is necessary for the **Late Days** field when the payment terms record is used for vendors.
6. Press <Enter> when data entry is complete.
7. Press <Enter> when prompted to confirm.
8. If necessary, press <F9> to display the previously entered payment terms records.
9. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Route Definitions

The Route Master Definitions application is used to define routes for customer deliveries and sales calls. Delivery routes are primarily used for selecting customer orders for picking and invoicing. Sales routes can be used for printing customer profitability reports. Refer to Printing Customer Profitability Reports of the Sales Analysis Reports document for additional information.

If deliveries and sales calls are made on the same day and only one stop is made by each, you can set up one record and leave the “Route Type” field blank to indicate that the record represents both routes.

The instructions which follow describe using the Edit Route Description Details screen to add a route definition record. After the records are added, they must be linked to customer records. Refer to Working With Customers in this section for additional information.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.

```
User: JEANNINE           Menu: CRM1CV1           Date: 5/05/06

===== > C U S T O M E R   R E L A T E D #1 <=====
=====
||||||| 1. Work With Corporates/Customers
THE    || 2. Work With Customers
DAC    ||
SYSTEM || 3. Work With Employees
||||||| 4. Job Title Definitions
                    5. Corporate Level Definitions
                    6. Account Type Definitions
                    7. Terms Definitions
                    8. Demographic Areas
                    9. Route Master Definitions

                    M E N U   C A L L S
19. Customer Related #2 20. Tax System           21. Customer Reports
22. File Maintenance   23. Dac Main Menu        90. Sign Off
=====
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==>
```

3. Select Option 9 (Route Master Definitions) from the Customer Related #1 screen. The Work With Routes screen appears with a list of route definition records if any were previously defined.

```

DSXXDFR   DISPLAY Creative Data Research           5/05/06 17:36:45
                                Work With Routes
Route Description      Route  Driver  Salesman  Route
                        Number
Type options, press Enter.
2=Edit Record

? Route Description      Route  Driver  Salesman  Route
                        Number  Type
101 MONDAY              101    TONY      D
201 TUESDAY             201    TONY      D

F3=Exit  F10=Add New Record

```

4. Press <F10> (Add New Record). The Edit Route Description KEY SCREEN screen appears.

```

DSBCE1R   ADD   Creative Data Research           5/05/06 17:37:40
                                Edit Route Description KEY SCREEN

Route Number .

F3=Exit  F4=Search  F9=Go to 'Change' mode

```

5. Enter a unique route code for the **Route Number** (6,a) field, and press <Enter>. The Edit Route Description Details screen appears.

```

DSBCE1R   ADD   Creative Data Research           5/05/06 17:37:56
                                Edit Route Description Details

Route Number . . . . . : 301

Route Description
Driver . . . . .
Salesman . . . . .

Status Day 1
Status Day 2
Status Day 3
Status Day 4
Status Day 5
Status Day 6
Status Day 7

Type . . . . .
Current Vehicle .

F3=Exit  F11=Delete

```

6. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:

- **Route Description** (30,a) - description of the route.
- Optional: **Driver** (6,a) - employee code of the driver for the route. If necessary, press <F4> to select a code from the Select Employee Master screen.
- Optional: **Salesman** (6,a) - employee code of the salesman for the route. If necessary, press <F4> to select a code from the Select Employee Master screen.
- Optional: **Status Day 1 - Status Day 7** (1,a) - are provided for informational purposes only, and to represent Monday through Sunday, respectively. Enter *Y* for yes to designate the day(s) of the week that the route is used. The default value of these fields is *N* for no.
- **Type** (1,a) - enter *D* for deliveries or *S* for sales calls, or leave the field blank to designate that the route is used for both.
- Optional: **Current Vehicle** (6,a) - code designating the vehicle used for the route.

7. Press <Enter> when data entry is complete.

```
DSBCE1R  ADD      Creative Data Research      5/05/06 17:38:38
                        Edit Route Description Details

Route Number . . . . . : 301

Route Description      301 WEDNESDAY
Driver . . . . .      TONY   TONY YETTA
Salesman . . . . .

Status Day 1
Status Day 2
Status Day 3  Y
Status Day 4
Status Day 5
Status Day 6
Status Day 7

Type . . . . .      D
Current Vehicle .

F3=Exit  F11=Delete

CONFIRM: Y (Y/N)
```

8. Press <Enter> when prompted to confirm. The Edit Route Description KEY SCREEN screen appears with the *Record added* message.

9. Continue adding route definition records, or press <F3> to exit. The Work With Routes screen appears.

10. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Account Types

Account types are used to group customers together for reasons that will vary according to the needs of the user. Possible uses are:

- Designating a specific invoice message for a group of customers. Refer to Adding An Order of the Billing document for information about the **Special Message 3** field. Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document for information about maintaining various messages that are printed on invoices.
- Printing the Velocity Report for all the customers of a group at one time. Refer to Printing A Velocity Report for additional information.
- Printing a particular version of the Velocity Report for a group of customers. Refer to Printing A Velocity Report for additional information.
- Enrolling customers in billing-related vendor deals. Refer to the Vendor Receivables document for additional information.

The following instructions describe using the Edit Account Type screen to add an account type record to the Account Type Master file. Each record includes a unique account type code consisting of a combination of any letters (*A* through *Z*) and numbers (*0* through *9*). The *Account Type Master already exists* message appears if a previously used code is entered.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.

```
User: JEANNINE           Menu: CRM1CV1           Date: 5/05/06

=====> C U S T O M E R   R E L A T E D #1 <=====
=====
|||||
THE  ||          1. Work With Corporates/Customers
DAC  ||          2. Work With Customers
SYSTEM ||        3. Work With Employees
|||||           4. Job Title Definitions
                    5. Corporate Level Definitions
                    6. Account Type Definitions
                    7. Terms Definitions
                    8. Demographic Areas
                    9. Route Master Definitions

                        M E N U   C A L L S
19. Customer Related #2  20. Tax System           21. Customer Reports
22. File Maintenance    23. Dac Main Menu          90. Sign Off

=====
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```

3. Select option 6 (Account Type Definitions) from the Customer Related #1 screen. The Edit Customer Type screen appears with a list of account type records if any were previously defined.
4. If account type records exist, press <F9> (Go to 'Add' mode).

```

DSA3EFR  ADD    Creative Data Research      5/05/06 10:07:08
                Edit Account Type

Type options, press Enter.
D=Delete request

? Account      Account Type      Account Type Message
  Type      Description

F3=Exit  F9=Go to 'Change' mode

```

5. Enter a unique account type code for the **Account Type** (4,a) field.
6. Enter a description of the account type for the **Account Type Description** (30,a) field.
7. If the account type record will be used to print a message on customer invoices, enter the message text for the **Account Type Message** (30,a) field. The value entered will be the default value of the **Special Message 3** field of the Change Order Information screen.
8. Continue entering account type records as necessary, and press <Enter> when data entry is complete.

```

DSA3EFR  ADD    Creative Data Research      5/05/06 10:18:32
                Edit Account Type

Type options, press Enter.
D=Delete request

? Account      Account Type      Account Type Message
  Type      Description

CNDY      CANDY CUSTOMERS      Check Our Full Line Of HBA
DRUG      DRUG STORES          CIGARETTE COUNT ____ DRIVER
TOB       TOBACCO OUTLET
TX        TEXAS CUSTOMERS

F3=Exit  F9=Go to 'Change' mode

CONFIRM: Y (Y/N)

```

9. Press <Enter> when prompted to confirm. The Edit Account Type screen is cleared.
10. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Sales Group Definitions

Sales groups can be used to group customers together for:

- Printing the Weekly Sales Recap during end of week processing. Refer to the DAC Closing Procedures document for an example of this report.
- Printing the Customer Profitability Analysis report. Refer to Printing Customer Profitability Reports of the Sales Analysis Reports document for additional information.

The following instructions describe using the Edit Sales Group Master screen to add a sales group definition record to the Sales Group Master file. Each record includes a unique sales group code consisting of a combination of any letters (*A* through *Z*) and numbers (*0* through *9*). The *Sales Group Master already exists* message appears if a previously used code is entered.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.
3. Select option 19 (Customer Related #2) from the Customer Related #1 screen. The Customer Related #2 screen appears.

```
User: JEANNINE          Menu: CRM2CV1          Date: 5/08/06

===== > C U S T O M E R   R E L A T E D # 2 < =====
|||||||
THE   ||                1. Billing Matrix Definitions
DAC   ||                2. Retail Matrix Definitions
SYSTEM ||              3. Sales Group Master Definitions
|||||||                4. Work With Customer Options
|||||||                5. Work With Customer Pick Options
|||||||                6. Work With Customer Collections

                                M E N U   C A L L S
19. Customer Related #1  20. Tax System                21. Customer Reports
22. File Maintenance    23. Dac Main Menu           90. Sign Off
=====
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==>
```

4. Select option 3 (Sales Group Master Definitions) from the Customer Related #2 screen. The Edit Sales Group Master screen appears with a list of sales group records if any were previously defined.
5. If sales group records exist, press <F9> (Go to 'Add' mode).

```

DSIYEFR  ADD      Creative Data Research          5/08/06  8:46:47
                        Edit Sales Group Master

Type options, press Enter.
D=Delete request

? Sales Group  Sales Group
  Number      Description

+

F3=Exit  F9=Go to 'Change' mode

```

6. Enter a unique sales group code for the **Sales Group Number** (6,a) field.
7. Enter a description of the sales group for the **Sales Group Description** (30,a) field.
8. Continue entering sales group records as necessary, and press <Enter> when data entry is complete.

```

DSIYEFR  ADD      Creative Data Research          5/08/06  8:54:59
                        Edit Sales Group Master

Type options, press Enter.
D=Delete request

? Sales Group  Sales Group
  Number      Description
  INDCON      INDEPENDENT CONVENIENCE STORES
  LGCON       LARGE CONVENIENCE STORES
  SMCON       SMALL CONVENIENCE STORES

+

F3=Exit  F9=Go to 'Change' mode

CONFIRM: Y (Y/N)

```

9. Press <Enter> when prompted to confirm. The Edit Sales Group Master screen is cleared.
10. Press <F3> to exit. The Customer Related #2 screen appears.

Working With Billing Matrix Definitions

The Billing Matrix Definitions application is used to group customers together for pricing purposes. Refer to Working With Customer Contracts of the Billing File Maintenance document for information about adding pricing contracts for individual customers.

The instructions which follow describe using the Edit Billing Matrix Master screen to add a billing matrix definition record. After a record is added:

- The billing matrix must be linked to its customers using the **Billing Matrix** field of the customer records. Refer to Working With Customers below for additional information.
- The pricing contracts must be added for the billing matrix. Refer to Working With Billing Matrix Contracts of the Billing File Maintenance document for additional information.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.
3. Select option 19 (Customer Related #2) from the Customer Related #1 screen. The Customer Related #2 screen appears.

```
User: JEANNINE          Menu: CRM2CV1          Date: 5/08/06

===== > C U S T O M E R   R E L A T E D # 2 < =====
|||||||
THE    ||      1. Billing Matrix Definitions
DAC    ||      2. Retail Matrix Definitions
SYSTEM ||      3. Sales Group Master Definitions
|||||||      4. Work With Customer Options
|||||||      5. Work With Customer Pick Options
|||||||      6. Work With Customer Collections

                                M E N U   C A L L S
19. Customer Related #1  20. Tax System          21. Customer Reports
22. File Maintenance    23. Dac Main Menu       90. Sign Off
=====
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====>
```

4. Select option 1 (Billing Matrix Definitions) from the Customer Related #2 screen. The Edit Billing Matrix Master screen appears with a list of billing matrix records if any were previously defined.
5. If billing matrix records exist, press <F9> (Go to 'Add' mode).

```

DSEYEFR  ADD      Creative Data Research      5/08/06 10:23:12
                        Edit Billing Matrix Master

Type options, press Enter.
D=Delete request

? Billing  Billing Matrix Desc.
  Matrix

+

F3=Exit  F9=Go to 'Change' mode

```

6. Enter a unique number for the **Billing Matrix** (6,n) field.
7. Enter a description of the customer group for the **Billing Matrix Desc** (30,a) field.
8. Continue entering billing matrix records as necessary, and press <Enter> when data entry is complete.

```

DSEYEFR  ADD      Creative Data Research      5/08/06 10:28:15
                        Edit Billing Matrix Master

Type options, press Enter.
D=Delete request

? Billing  Billing Matrix Desc.
  Matrix
    1  AMERICA STORES
    2  INDEPENDENT CONVENIENCE STORES

+

F3=Exit  F9=Go to 'Change' mode

CONFIRM: Y (Y/N)

```

9. Press <Enter> when prompted to confirm. The Edit Billing Matrix Master screen is cleared.
10. Press <F3> to exit. The Customer Related #2 screen appears.

Working With Retail Matrix Definitions

The Retail Matrix Definitions application is used to group customers together for retail pricing purposes. Refer to Working With Retail Contracts of the Billing File Maintenance document for information about adding retail pricing contracts for individual customers.

The instructions which follow describe using the Edit Retail Matrix Master screen to add a retail matrix definition record. After a record is added:

- The retail matrix must be linked to its customers using the **Retail Matrix** field of the customer records. Refer to Working With Customers below for additional information.
 - The retail pricing contracts must be added for the retail matrix. Refer to Working With Retail Contracts of the Billing File Maintenance document for additional information.
1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
 2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.
 3. Select option 19 (Customer Related #2) from the Customer Related #1 screen. The Customer Related #2 screen appears.

```
User: JEANNINE          Menu: CRM2CV1          Date: 5/08/06

===== > C U S T O M E R   R E L A T E D #2 <=====
=====
|||||||
THE  ||          1. Billing Matrix Definitions
DAC  ||          2. Retail Matrix Definitions
SYSTEM ||        3. Sales Group Master Definitions
|||||||          4. Work With Customer Options
|||            5. Work With Customer Pick Options
|||            6. Work With Customer Collections

                                M E N U   C A L L S
19. Customer Related #1  20. Tax System          21. Customer Reports
22. File Maintenance    23. Dac Main Menu         90. Sign Off

=====
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==>
```

4. Select option 2 (Retail Matrix Definitions) from the Customer Related #2 screen. The Edit Retail Matrix Master screen appears with the *No data to display* message if no retail matrix records have been previously added.
5. Press <F9> (Go to 'Add' mode).

```

DSEWEFR  ADD      Creative Data Research      5/08/06 10:45:00
                        Edit Retail Matrix Master

Type options, press Enter.
D=Delete request

? Retail  Retail Matrix Desc.
  Matrix

F3=Exit  F9=Go to 'Change' mode

```

6. Enter a unique number for the **Retail Matrix** (6,n) field.
7. Enter a description of the customer group for the **Retail Matrix Desc** (30,a) field.
8. Continue entering retail matrix records as necessary, and press <Enter> when data entry is complete.

```

DSEWEFR  ADD      Creative Data Research      5/08/06 10:48:13
                        Edit Retail Matrix Master

Type options, press Enter.
D=Delete request

? Retail  Retail Matrix Desc.
  Matrix
    1  AMERICA STORES
    2  REXALL DRUG STORES

F3=Exit  F9=Go to 'Change' mode
CONFIRM: Y (Y/N)

```

9. Press <Enter> when prompted to confirm. The Edit Retail Matrix Master screen is cleared.
10. Press <F3> to exit. The Customer Related #2 screen appears.

Working With Corporate Level Definitions

The following instructions describe using the Edit Level Description screen to add a corporate level description record. Each record includes a unique level code consisting of a single letter (A through Z) and number (0 through 9).

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.
3. Select Option 5 (Corporate Level Definitions) from the Customer Related #1 screen. The Edit Level Description screen appears with a list of corporate level descriptions if any were previously defined.
4. If corporate level descriptions were previously defined, press <F9> (Go to 'Add' mode).

```
DSBNEFR  ADD                                2/20/06 12:11:32
                                Edit Level Description

Type options, press Enter.
D=Delete request

? Level      Level Description
  Code

+

F3=Exit  F9=Go to 'Change' mode
```

5. Enter a unique code for the **Level Code** (1,a) field.
6. Enter the description for the **Level Description** (25,a) field.
7. Continue entering level codes and descriptions as necessary, and press <Enter> when data entry is complete.

```
DSBNEFR  ADD                                2/20/06 12:18:11
                                Edit Level Description

Type options, press Enter.
D=Delete request

? Level      Level Description
  Code
  1  Headquarters
  2  Division
  3  Branch

+

F3=Exit  F9=Go to 'Change' mode
CONFIRM: Y (Y/N)
```

8. Press <Enter> when prompted to confirm. The Edit Level Description screen is cleared.
9. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Demographic Areas

Demographic areas can be used to group customers together for the purpose of enrolling customers in billing-related vendor deals. Refer to the Vendor Receivables document for additional information.

The following instructions describe using the Edit Demographic Desc screen to add a demographic record to the Demographic Description Master file. Each record includes a unique demographic code consisting of a combination of any letters (A through Z) and numbers (0 through 9). The *Demographic Desc. Master already exists* message appears if a previously used code is entered.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.

```
User: JEANNINE           Menu: CRM1CV1           Date: 5/05/06

===== > C U S T O M E R   R E L A T E D #1 <=====
=====
|||||
THE   ||           1. Work With Corporates/Customers
DAC   ||           2. Work With Customers
SYSTEM ||         3. Work With Employees
|||||              4. Job Title Definitions
                          5. Corporate Level Definitions
                          6. Account Type Definitions
                          7. Terms Definitions
                          8. Demographic Areas
                          9. Route Master Definitions

                          M E N U   C A L L S
19. Customer Related #2  20. Tax System           21. Customer Reports
22. File Maintenance    23. Dac Main Menu          90. Sign Off

=====
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==>
```

3. Select option 8 (Demographic Areas) from the Customer Related #1 screen. The Edit Demographic Desc screen appears with a list of demographic records if any were previously defined.
4. If demographic records exist, press <F9> (Go to 'Add' mode).

```

DSA6EFR  ADD                               5/05/06 12:53:04
                                Edit Demographic Desc.

Type options, press Enter.
D=Delete request

? Demographic  Demographic
  Code         Description

+

F3=Exit  F9=Go to 'Change' mode

```

5. Enter a unique demographic code for the **Demographic Code** (4,a) field.
6. Enter a description of the demographic area for the **Demographic Description** (30,a) field.
7. Continue entering demographic records as necessary, and press <Enter> when data entry is complete.

```

DSA6EFR  ADD                               5/05/06 13:01:32
                                Edit Demographic Desc.

Type options, press Enter.
D=Delete request

? Demographic  Demographic
  Code         Description
  CITY        CITIES
  RURL        TOWNSHIPS
  SUBS        SUBURBS
  URBN        URBAN AREAS

+

F3=Exit  F9=Go to 'Change' mode

CONFIRM: Y (Y/N)

```

8. Press <Enter> when prompted to confirm. The Edit Demographic Desc screen is cleared.
9. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Customers

The Work With Corporates/Customers and Work With Customers applications are used to create, copy and change records in the DAC Customer Corporate Master file and Customer Master file, respectively.

The Customer Corporate Master file primarily contains “bill to” information, such as the name and address of the corporation or company to which monthly statements are sent. This data is entered at the Add Corporate screen shown below, and referred to as a *customer corporate record*.

```

DSDAE1R  ADD      CDR Customer Conference          5/26/22 11:53:12
                          Add Corporate
Customer Corp #: 999999                      Corporate Type .  -
Name . . . . .                               Controlled By Corp #  _____
Addr 1 . . . . .                             Level Code .  _____
Addr 2 . . . . .                             Branch Code .  _____
Addr 3 . . . . .                             Country Code  _____
City . . . . .                               State  __ Zip  _____ -  _____

Phone no.  _____ -  _____ Inter Dialing . . .  _____
Fax Phone  _____ -  _____ Account Rep Sales .  _____ Statement Code  _____
Dateline  _____ -  _____ Account Rep A/R . .  _____ Password  _____

Corporate Contacts      Corporate Titles
1  _____          1  _____
2  _____          2  _____
3  _____          3  _____
4  _____          4  _____
5  _____          5  _____
Email _____
Email _____

F3=Exit  F4=Search  F12=Key screen
    
```

The Customer Master file contains other customer-specific information, such as shipping address, tax jurisdiction, account salesman, billing contracts, payment terms, item substitution and authorization, and much more. This data is entered at the three Edit Customer screens and Edit Order Day/Time screen shown below, and referred to as a *customer record*.

```

DSDBE3R  CHANGE  CDR Customer Conference          5/26/22 11:35:56
                          Edit Customer Page 1
Customer Number : 320001                      Corporate Number 320001
Status Code : A                               Store Number . .
Customer Name . . BIG P MINI MART
Address Line 1 . . 19191 COMMISSION ROAD
Address Line 2 . .
Address Line 3 . .
City . . . . . LONGBEACH                      St. MS
Zip Code . . . . . 39560 - 0000              Phone # . . 601 - 8687050
Tax Jurisdiction . MS0001                    Branch Code _____ G/L Code _____
BillTo Code . . . -                          Late Charge Code Y Percent: _____
Credit Limit . . . _____                Terms Code . . . 024
Sales Group . . . _____                 Marketing Rep. . 20
Marketing Mgr . . . _____                Marketing Dir . .
Demographic Code . _____                Account Type . .
Price Hold Days . . _____                Authorized Item Y Auth. U/M _
Surcharge Override N                          Build-Up Code .
Billing Matrix . . _____                 Retail Matrix .
Subst. Code . . . Y                           Inv. Reprint Code _____
Service Type . . . _____                 Restk. Fee Ovr. N
Statement Code . . W1                          Notify Price Chg. Y
F3=Exit  F4=Search  F2=Change Corp. No.  F6=Notes  Roll=Next/Prev Screen
    
```

```

DSDBE3R  CHANGE  CDR Customer Conference          5/26/22 12:03:28
                        Edit Customer Page 2
Customer 320001  BIG P MINI MART

Contacts                Titles                Ext.
1. FRANK DOBBS          _____          _____
2. _____          _____          _____
3. _____          _____          _____
4. _____          _____          _____
5. _____          _____          _____

Inter Dialing  ___  Fax Phone  601 - 4658999  Dataline Phone  ___ - _____
Store Classification(WAM) . _____  Include For USG Reporting?  -
Federal Tax Id  10-3838837 _____  State Tax Id . . . . . _____
Cigarette License _____  Tobacco License . . . 635188276 _____
License 3 . . . . . _____  Tax Group _ Password . . . . . _____
Retail Labels? . . . . . - Allowance Based Retail . . . . . Y
Frequent Mailing List _____  Exclude From Allowances? . . -
Invoice Trailer Report N _____  QDN Customer Number _____
Customer Start Date  32607 _____  Exclude From Promos? _____
MSA Customer Classification: R _____  MSA Promotion Acceptance? Y
Exclude Auto Merge Orders _____  Cash & Carry Customer? . . -
F3=Exit  F24=Extended Information  Roll=Next/Prev Screen

```

```

DSDBE3R  CHANGE  CDR Customer Conference          5/26/22 12:19:11
                        Edit Customer Page 3

Customer Number . . : 320001  BIG P MINI MART

Call Route 1 . . . . 100          Call Sequence 1 . . . . _____
Call Route 2 . . . . _____  Call Sequence 2 . . . . _____
Call Route 3 . . . . _____  Call Sequence 3 . . . . _____
Call Route 4 . . . . _____  Call Sequence 4 . . . . _____
Call Route 5 . . . . _____  Call Sequence 5 . . . . _____
Call Route 6 . . . . _____  Call Sequence 6 . . . . _____
Call Route 7 . . . . _____  Call Sequence 7 . . . . _____

Delivery Route 1 . . _____  Delivery Sequence 1 . . _____
Delivery Route 2 . . 200 _____  Delivery Sequence 2 . . _____5
Delivery Route 3 . . _____  Delivery Sequence 3 . . _____
Delivery Route 4 . . _____  Delivery Sequence 4 . . _____
Delivery Route 5 . . _____  Delivery Sequence 5 . . _____
Delivery Route 6 . . _____  Delivery Sequence 6 . . _____
Delivery Route 7 . . _____  Delivery Sequence 7 . . _____

Primary Delivery Route 200 _____
F3=Exit  F4=Search  F5=Edit Order Day/Time  Roll=Next/Prev Screen

```

```

DSALPVR  ENTER  CDR Customer Conference          5/26/22 12:27:48
                        Edit Order Day/Time

Customer Number : 320001  BIG P MINI MART

Order Day 1 . . Y          Order Time 1 . . 12:00
Order Day 2 . . -          Order Time 2 . . _____
Order Day 3 . . -          Order Time 3 . . _____
Order Day 4 . . -          Order Time 4 . . _____
Order Day 5 . . -          Order Time 5 . . _____
Order Day 6 . . -          Order Time 6 . . _____
Order Day 7 . . -          Order Time 7 . . _____

F3=Exit

```

Users should refer to the DAC Default System Options document for information about the following fields related to customer records:

- **Use Branch Code For Whse., Make Zip Code Required? and Default Restocking Fee %** fields of the SYS001 default system option (General System Options).
- **Require Tax Jurisdiction?** field of the SYS002 default system option (General System Options).

- **Use Bill-To Code and Hold Orders For Over Credit Limit?** field of the SYS036 default system option (A/R Options).
- **Use Price Holds?** field of the SYS030 default system option (Performance Options).
- **Require Tobacco Tax ID** field of the SYS033 default system option (Billing Options).
- **Print Customer License 2?** field of the SYS031 default system option (Invoice Options).
- **QDN Active** field of the SYS040 default system option (QDN Options).

Customer corporate records and customer records are added for two types of customers:

- **Individual Customer** - a customer whose “bill to” address is not the same as that of any other customer. For these customers, records are created by:
 1. Adding a customer corporate record to the Customer Corporate Master file containing “bill to” information for the customer, then
 2. Adding a customer record to the Customer Master file which contains other customer-specific information.
- **Chain Customer** - a customer whose “bill to” address is the same as that of other customers, such as those of a corporate chain. For a chain of customers, records are created by:
 1. Adding a single customer corporate record to the Customer Corporate Master file that contains the “bill to” information which is shared by all the customers of the chain, then
 2. Adding a customer record *for each customer* to the Customer Master file which contains the customer-specific information for each.

The following instructions describe adding the customer corporate record and customer record for an individual customer. The DAC Customers Quick Reference Guide includes instructions for adding the records of multiple customers who have the same billing address, but different shipping addresses. Contact CDR support personnel for information about using the DAC Support Site to access the DAC User Guide.

The data for which user entry is not required in order to add a customer record is labeled as “Optional” in the instructions which follow. As noted in the instructions, some of the required data may be “entered” by system default, and no user entry is necessary.

Data entry worksheets are included, following the instructions below, to facilitate data entry. Refer to Copying Customer Records for information about duplicating customer records.

Adding Customer Records

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.

```
User: JEANNINE          Menu: CRM1CV1          Date: 5/26/22
=====
=====> C U S T O M E R   R E L A T E D #1 <=====
=====
|||||
THE  ||          1. Work With Corporates/Customers
DAC  ||          2. Work With Customers
SYSTEM ||        3. Work With Employees
|||||
|||||
M E N U   C A L L S
19. Customer Related #2  20. Tax System          21. Customer Reports
22. File Maintenance    23. Dac Main Menu         90. Sign Off
=====
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===>
```

3. Select option 1 (Work With Corporates/Customers) from the Customer Related #1 screen. The Display Corporate by Name screen appears.
4. Press <F10> (Enter new record). The Add Corporate screen appears.

```
DSDAEIR  ADD      CDR Customer Conference          5/26/22 12:30:34
              Add Corporate
Customer Corporate Number . _____
F3=Exit
```

5. Enter a number of six or fewer digits (other than 000001) for **Customer Corporate Number** (6,n). The customer's corporate number, which is used to access the customer's "bill to" information, must be unique. The *Customer Corporate Master already exists* message appears if a previously used corporate number is entered.

An individual customer's corporate number is also used as the default of the **Customer Number** field of the Edit Customer Page 1 screen. For this reason, the customer's corporate number must not have been previously used as another

customer's **Customer Number**. If the *Corp number has been used as a Customer Number Continue?* message appears, press <F3>.

Users have the option of leaving **Customer Corporate Number** blank. In this case, DAC defaults to the first unused number beginning with 000001, and the *Corporate Number will be automatically assigned by the system* message appears at the bottom of the screen.

6. Press <Enter>. The Add Corporate screen is redisplayed with the customer's corporate number as previously entered.

```

DSDAE1R  ADD  CDR Customer Conference  5/26/22 11:53:12
                Add Corporate
Customer Corp #: 100008
Name . . . . . Corporate Type . -
Addr 1 . . . . . Controlled By Corp # ____
Addr 2 . . . . . Level Code _
Addr 3 . . . . . Branch Code . ____
City . . . . . Country Code ____
                State _ Zip ____ - ____
Phone no. ____ - ____ Inter Dialing . . . ____
Fax Phone ____ - ____ Account Rep Sales . ____ Statement Code __
Dateline ____ - ____ Account Rep A/R . . . Password ____
                Corporate Contacts                Corporate Titles
1 ____ 1 ____
2 ____ 2 ____
3 ____ 3 ____
4 ____ 4 ____
5 ____ 5 ____
Email ____
Email ____
F3=Exit  F4=Search  F12=Key screen

```

7. Enter *I* for **Corporate Type** (1,a) to designate an individual customer.
8. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:
 - Optional: **Controlled By Corporate #** (6,n) - a customer corporate number previously defined by the user. If necessary, press <F4> to select a customer corporate number from the Select Corporate Master screen. This data is not required for using DAC directly, but could be used (with the IBM Query utility) to produce reports concerning a corporation's hierarchical structure.
 - Optional: **Level Code** (1,a) - a corporate level code previously defined by the user. If necessary, press <F4> to select a level code from the Select Level Description screen. This data is not required for using DAC directly, but could be used (with the IBM Query utility) to produce reports concerning a corporation's hierarchical structure.
 - **Name** (35,a) - the company name which is printed on invoices and statements with the billing address.
 - Optional: **Branch Code** (6,a) - a warehouse code previously defined with option 3 (Warehouse Definitions) of the Product Related screen. If **YES* is entered for the **Use Branch Code For Whse** field of the SYS001 default system option, the warehouse code entered for **Branch Code** will be the default value of the **Default Warehouse** field when adding a customer order.

- **Addr 1** (30,a) - street number and street name of the customer's billing address which is printed on invoices and statements.
- Optional: **Addr 2 - Addr 3** (30,a) - the remaining portion of the customer's billing address, such as post office box number, which is printed on invoices and statements.
- Optional: **Country Code** (3,a) - the country in which the customer's office is located
- **City** (30,a) - the city of the customer's billing address.
- **State** (2,a) - the state of the customer's billing address.
- **Zip** (5-9,n) - the zip code and 4-digit extension of the customer's billing address. Entering a value for the **Zip** field is only required if **YES* is entered for the **Make Zip Code Required** field of the SYS001 default system option. Refer to the DAC Default System Options document for additional information.
- Optional: **Phone no** (10,n) - the customer's area code and telephone number.
- Optional: **Inter Dialing** (3,n) - the 3-digit code required for international calling.
- Optional: **Fax Phone** (10,n) - the customer's area code and telephone number for fax transmission.
- Optional: **Account Rep Sales** (6,a) - the employee code of the sales representative assigned to the customer's account. If necessary, press <F4> to select an employee code from the Select Employee Master screen. This field is used for printing Aged Trial Balance reports. Refer to Printing Aged Trial Balance Reports of the Accounts Receivable document for additional information.
- Optional: **Statement Code** (2,a) - a one or two-digit alphanumeric value used to print a single batch of statements for a group of customers. For example, it may designate the day of the week on which the customer's statement is printed, such as *TU* for Tuesday. Refer to the Accounts Receivable document for information about printing statements by statement code.
- Optional: **Dataline** (10,n) - the customer's area code and telephone number for data transmission.
- Optional: **Account Rep A/R** (6,a) - the employee code of the accounts receivable representative as previously defined by the user with option 3 (Work With Employees) of the Customer Related #1 screen. If necessary, press <F4> to select an employee code from the Select Employee Master

screen. This field is used for printing Aged Trial Balance reports. Refer to Printing Aged Trial Balance Reports of the Accounts Receivable document for additional information.

- Optional: **Password** (8,a) - the customer corporate level password for using Web Console, an optional module of DAC. Refer to the **Password** field of the Edit Customer Page 2 screen below for information about the customer level password.
- Optional: **Corporate Contacts 1** (30,a) - the customer employee's name which is printed on invoices and statements with the billing address.
- Optional: **Corporate Contacts 2 - Corporate Contacts 5** (30,a) - the names of other customer employees with whom the user communicates.
- Optional: **Corporate Titles 1 - Corporate Titles 5** (30,a) - the job titles of the customer's employees designated as **Corporate Contacts 1 - Corporate Contacts 5**.
- Optional: **Email** - one or two addresses can be used for sending velocity reports, pre-book notifications and price change notifications to customers if outbound email functionality is enabled on the distributor's system. Refer to Working With Document Distribution Records of the System File Maintenance document for additional information.

9. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Edit Customer Page 1 screen appears with the *A customer record is being added to an individual "I" type corporate record* message.

```

DSDBE3R  CHANGE  CDR Customer Conference                    5/26/22 11:35:56
                                Edit Customer Page 1
Customer Number : 100008                      Corporate Number 100008
Status Code : A                               Store Number . .
Customer Name . . STOP & GO
Address Line 1 . . 5224 HWY 190
Address Line 2 . .
Address Line 3 . .
City . . . . . COVINGTON                          St. LA
Zip Code . . . . . 704333 -                      Phone # . . 601 - 8687050
Tax Jurisdiction . MS0001                      Branch Code    G/L Code
BillTo Code . . . -                            Late Charge Code Y Percent:
Credit Limit . . . -                          Terms Code . .
Sales Group . . . -                          Marketing Rep. .
Marketing Mgr . . -                          Marketing Dir .
Demographic Code . -                        Account Type .
Price Hold Days . -                          Authorized Item - Auth. U/M
Surcharge Override N                          Build-Up Code .
Billing Matrix . . -                          Retail Matrix .
Subst. Code . . . Y                            Inv. Reprint Code
Service Type . . . -                          Restk. Fee Ovr. N
Statement Code . . -                          Notify Price Chg. N
F3=Exit F4=Search F2=Change Corp. No. F6=Notes Roll=Next/Prev Screen
  
```

10. Press <Tab> to move the cursor from the **Corporate Number** field to the **Store Number** field.

DSDBE3R CHANGE CDR Customer Conference		5/26/22 11:35:56	
Edit Customer Page 1			
Customer Number :	100008	Corporate Number	100008
Status Code :	A	Store Number . .	
Customer Name . .	STOP & GO		
Address Line 1 . .	5224 HWY 190		
Address Line 2 . .			
Address Line 3 . .			
City	COVINGTON	St. IA	
Zip Code	70433 -	Phone #	
Tax Jurisdiction .		Branch Code	G/L Code
BillTo Code . . .		Late Charge Code	Y Percent: _____
Credit Limit . . .		Terms Code . . .	
Sales Group . . .		Marketing Rep. . .	
Marketing Mgr . .		Marketing Dir . .	
Demographic Code .		Account Type . .	
Price Hold Days .		Authorized Item	Auth. U/M
Surcharge Override	N	Build-Up Code . .	
Billing Matrix . .		Retail Matrix . .	
Subst. Code . . .	Y	Inv. Reprint Code	
Service Type . . .		Restk. Fee Ovr. .	N
Statement Code . .		Notify Price Chg. .	N
F3=Exit F4=Search F2=Change Corp. No. F6=Notes Roll=Next/Prev Screen			

11. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:

- Displayed field: **Status Code** (1,a) - the customer status code is *A* for active when the user first creates the customer's record. It may be changed to *D* for delete and *I* for inactive. Refer to Deleting Customer Records and Changing Customer Status for additional information.
- Optional: **Store Number** (6,n) - the customer's store number may be used for entering daily transactions associated with accounts receivable. Refer to Working With A/R Batches of the Accounts Receivable document for additional information. A different value must be entered for the **Store Number** field of each record of a chain of customers.
- **Customer Name** (35,a) - the company name which is printed on invoices with the shipping address.
- Optional: **Address Line 1 - Address Line 3** (30,a) - the customer's shipping address which is printed on invoices.
If the user participates in reporting programs, such as PMStars, the street address must be entered for the **Address Line 1** field. Additional address information, such as a contact's name, should be entered for the **Address Line 2** and **Address Line 3** fields. Refer to Working With Unitrac of the Item File Maintenance document for additional information.
- **City** (30,a) - the city of the customer's shipping address.
- **St** (2,a) - the state of the customer's shipping address.
- **Zip Code** (5-9,n) - the zip code and 4-digit extension of the customer's shipping address. Entering a value for the **Zip Code** field is only required if **YES* is entered for the **Make Zip Code Required** field of the SYS001 default system option. Refer to the DAC Default System Options document for additional information.
- Optional: **Phone #** (10,n) - the customer's area code and telephone number.

DSDBE3R CHANGE CDR Customer Conference		5/26/22 11:35:56	
Edit Customer Page 1			
Customer Number :	100008	Corporate Number	100008
Status Code :	A	Store Number . .	
Customer Name . .	STOP & GO		
Address Line 1 . .	5224 HWY 190		
Address Line 2 . .			
Address Line 3 . .			
City	COVINGTON	St. LA	
Zip Code	70433 -	Phone #	
Tax Jurisdiction . .		Branch Code	G/L Code
BillTo Code		Late Charge Code . .	Y Percent:
Credit Limit		Terms Code	
Sales Group		Marketing Rep.	
Marketing Mgr		Marketing Dir	
Demographic Code . .		Account Type	
Price Hold Days . . .		Authorized Item	Auth. U/M
Surcharge Override . .	N	Build-Up Code	
Billing Matrix		Retail Matrix	
Subst. Code	Y	Inv. Reprint Code	
Service Type		Restk. Fee Ovr.	N
Statement Code		Notify Price Chg.	N
F3=Exit F4=Search F2=Change Corp. No. F6=Notes Roll=Next/Prev Screen			

- **Tax Jurisdiction (6,a)** - a tax jurisdiction code. If necessary, press <F4> to select a tax jurisdiction code from the Select Tax Jurisdiction screen. Refer to the Tax System document for additional information.
- Optional: **BillTo Code (1,a)** - *S* is entered to designate that the customer's name and shipping address can be used for billing, and that the primary contact entered for the **Contacts 1** field (see below), can also be printed on invoices and statements. The value of *Y* must also be entered for the **Use Bill-To Code** field of the SYS036 default system option in order to print the customer's shipping address on invoices and statements. If **BillTo Code** is left blank, the customer's name, billing address and primary contact, as entered for the customer corporate record, is used for billing.
- Optional: **Credit Limit (7,n)** - the maximum amount of credit extended to the customer. The *Customer Is Over Their Credit Limit* message will appear on the screen when the user begins to enter an order for a customer who exceeded the credit limit with a previous order. A warning message also appears on the Upload Summary report during remote order entry. If **YES* is entered for the **Hold Orders For Over Credit Limit?** field of the SYS036 default system option, users cannot print pick lists (or other pick documents), and cannot print invoices after entering an order for a customer who exceeded their credit limit. Refer to the DAC Default System Options document for additional information. Credit limit warnings will not be issued unless *Y* is entered for the **A/R Verification** field for the user's option record. Refer to Working With User Options of the Billing File Maintenance document for additional information.
- Optional: **Sales Group (6,a)** - a sales group code previously defined by the user. If necessary, press <F4> to select a sales group code from the Select Sales Group Master screen. This field can be used for printing the Weekly Sales Recap and the Customer Profitability Analysis reports. Refer to Working With Sales Group Definitions above for additional information.
- Optional: **Marketing Mgr (6,a)** - the employee code of the marketing manager. If necessary, press <F4> to select an employee code from the Select

Employee Master screen. This data is not required for using DAC directly, but could be used (with the IBM Query utility) to produce reports.

- Optional: **Demographic Code** (4,a) - a demographic area code previously defined by the user. If necessary, press <F4> to select a code from the Select Demographic Code screen. This field is used for enrolling customers in vendor deals. Refer to the Vendor Receivables document for additional information.
- Optional: **Price Hold Days** (3,n) - designates the number of days that will elapse before a price change takes effect for the customer when *Y* is entered for the **Hold** field of the price change record. If the **Price Hold Days** field is left blank, or *N* is entered for the **Hold** field of the price change records, price changes take effect immediately. Refer to Working With Price Maintenance of the Item File Maintenance document for additional information.
- Optional: **Surcharge Override** (1,a) - *Y* for yes to exclude this customer from surcharges for ordering eaches when this unit of measure is not the item's standard selling unit of measure (**Standard U/M**). If left blank, the default value of **Surcharge Override** is *N* for no. Refer to Entering Surcharges and Discounts of the Item File Maintenance document for additional information.
- Optional: **Billing Matrix** (6,n) - a billing matrix number previously defined by the user. If necessary, press <F4> to select a billing matrix number from the Select Billing Matrix screen. Refer to Working With Billing Matrix Contracts of the Billing File Maintenance document for additional information.
- Optional: **Subst. Code** (1,a) - *Y* designates that the customer will receive out-of-stock and forced item substitutions, and *X* designates that the customer will receive neither type of substitution. If the **Subst Code** field is blank, or its value is *N*, the customer will receive only forced item substitutions. The default value of this field is *Y*. Refer to Adding Item Records of the Item File Maintenance document for information about the **Substitute Item** and **Type** fields of the item record.
- Optional: **Service Type** (1,a) - *F* designates that this is the record of a full service customer, and *M* designates maintenance. This data is not required for using DAC directly, but could be used (with the IBM Query utility) to produce reports.
- Optional: **Statement Code** (2,a) - a one or two-digit alphanumeric value used to print a single batch of statements for a group of customers. For example, it may designate the day of the week on which the customer's statement is printed, such as *TU* for Tuesday. Refer to the Accounts Receivable document for information about printing statements by statement code.

```

DSDBE3R  CHANGE  CDR Customer Conference  5/26/22 11:35:56
                                Edit Customer Page 1
Customer Number : 100008          Corporate Number 100008
Status Code : A                   Store Number . .
Customer Name . . STOP & GO
Address Line 1 . . 5224 HWY 190
Address Line 2 . .
Address Line 3 . .
City . . . . . COVINGTON          St. LA
Zip Code . . . . 70433 -         Phone # . . . . -
Tax Jurisdiction .
BillTo Code . . . -
Credit Limit . . .
Sales Group . . .
Marketing Mgr . .
Demographic Code .
Price Hold Days .
Surcharge Override N
Billing Matrix . .
Subst. Code . . . Y
Service Type . . .
Statement Code . .
F3=Exit F4=Search F2=Change Corp. No. F6=Notes Roll=Next/Prev Screen
Branch Code _____ G/L Code _____
Late Charge Code Y Percent: _____
Terms Code . . .
Marketing Rep. . .
Marketing Dir . .
Account Type . .
Authorized Item _ Auth. U/M _
Build-Up Code .
Retail Matrix .
Inv. Reprint Code
Restk. Fee Ovr. N
Notify Price Chg. N

```

- Optional: **Branch Code** (6,a) - a warehouse code previously defined with option 3 (Warehouse Definitions) of the Product Related screen. If *YES is entered for the **Use Branch Code For Whse** field of the SYS001 default system option, the warehouse code entered for **Branch Code** will be the default value of the **Default Warehouse** field when adding a customer order.
- Optional: **G/L Code** (6,a) - the General Ledger sales group code used to transfer sales data by cost center to the General Ledger System. If the DAC G/L System or multiple cost centers are not used, leave this field blank. Refer to Working With Interface Records For Sales of the General Ledger document for additional information.
- Optional: **Late Charge Code** (1,a) - Y for yes designates that late charges will be levied against the customer for overdue payments. If left blank, the default value of **Late Charge Code** is Y. Refer to Working With Late Charges of the Accounts Receivable document for additional information.
- Optional: **Terms Code** (3,a) - a payment terms code previously defined by the user. If necessary, press <F4> to select a payment terms code from the Select Terms Description screen. The *Customer Is Past Due On Terms* message will appear on the screen when the user begins to enter an order for a customer from whom payment is overdue. A warning message also appears on the Upload Summary report during remote order entry.
Past due warnings will not be issued unless Y is entered for the **A/R Verification** field for the user's option record. Refer to Working With User Options of the Billing File Maintenance document for additional information.
- **Marketing Rep** (6,a) - the employee code of the sales representative assigned to the customer's account. If necessary, press <F4> to select an employee code from the Select Employee Master screen. This field is required for numerous functions, such as using the Work With Commissions application, and producing salesman-related reports.
- Optional: **Marketing Dir** (6,a) - the employee code of the marketing director as previously defined by the user. If necessary, press <F4> to select an

employee code from the Select Employee Master screen. This field is used for printing the Weekly Sales Recap report. Refer to Working With End of Week of the DAC Closing Procedures document for additional information.

- Optional: **Account Type** (4,a) - a code previously defined by the user. If necessary, press <F4> to select an account type code from the Select Account Type screen. This field can be used, but is not required, for printing a specific message on invoices, and printing velocity reports. Refer to Working With Account Types for additional information.
- Optional: **Authorized Item** (1,a) - *Y* for yes limits the customer to ordering only items that are authorized for purchase, unless this “unauthorized” status is overridden when an order is entered. The default value of **Authorized Item** is *N* for no. Refer to Working With Customer/Item Records of the Billing File Maintenance document for additional information.
- Optional: **Auth. U/M** (1,a) - *Y* for yes designates that a selling unit of measure may be used to limit the ordering of authorized items to a designated unit. Refer to Working With Customer/Item Records of the Billing File Maintenance document for information about the **Normal Buying Unit** field.
- Optional: **Build-Up Code** (1,a) - *Y* for yes indicates that the customer maintains specific quantity levels for some items as designated by the **Build Up Quantity** field of the customer/item record. Refer to Working With Customer/Item Records of the Billing File Maintenance document for additional information.
Maintaining quantity levels, based on the quantity on hand, is used when placing remote orders with a Telxon unit. Refer to Working With Telxon of the Billing document for additional information.
- Optional: **Retail Matrix** (6,n) - a retail matrix number previously defined by the user. If necessary, press <F4> to select a retail matrix number from the Select Retail Matrix screen. Refer to Working With Retail Contracts of the Billing File Maintenance document for additional information.
- Optional: **Inv. Reprint Code** (1,n) - the number of additional invoices printed (and reprinted) for this customer. Refer to Working With Customer Orders of the Billing document for information about printing and reprinting invoices.
- Optional: **Restk. Fee Ovr.** (1,a) - *Y* for yes to exclude this customer from restocking fees charged for returning items. If left blank, the default value of **Restk Fee Ovr** is *N* for no.

Refer to Working With Billing Reasons of the Billing File Maintenance document for information about restocking fee calculations.

- Optional: **Notify Price Chg.** (1,a) - *Y* for yes designates that a notification can be printed when the price of an item which the customer is authorized to purchase is changed by use of the Global Price Changes applications.

A price change notification will only be printed if *Y* for yes is entered for the **Notify** field of the price change record. Refer to Working With Price Maintenance of the Item File Maintenance document for additional information about using the Global Price Changes applications.

Printing of price change notifications is limited to customers who are authorized to purchase changed items. Refer to Working With Customer/Item Records of the Billing File Maintenance document for additional information.

If left blank, the default value of **Notify Price Chg** is *N* for no.

12. Press <Page Down> to continue adding data at the Edit Customer Page 2 screen.

```

DSDBE3R  ADD  CDR Customer Conference  5/26/22 14:20:26
                Edit Customer Page 2
Customer 100008  STOP & GO

Contacts                Titles                Ext.
1. _____          _____          _____
2. _____          _____          _____
3. _____          _____          _____
4. _____          _____          _____
5. _____          _____          _____

Inter Dialing  _____  Fax Phone  _____  Dataline Phone  _____
Store Classification(WAM)  _____  Include For USG Reporting?  _____
Federal Tax Id  _____          State Tax Id . . . .  _____
Cigarette License  _____          Tobacco License . . . .  _____
License 3 . . . .  _____          Tax Group _ Password . . . .  _____
Retail Labels? . . . .  _____          Allowance Based Retail . . . .  _____
Frequent Mailing List  _____          Exclude From Allowances? . . . .  _____
Invoice Trailer Report  _____          QDN Customer Number  _____
Customer Start Date  _____52622          Exclude From Promos?  _____
MSA Customer Classification:  _____          MSA Promotion Acceptance?  _____
Exclude Auto Merge Orders  _____          Cash & Carry Customer? . . . .  _____
F3=Exit  F24=Extended Information  Roll=Next/Prev Screen

```

13. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:

- Optional: **Contacts 1** (30,a) - the customer employee's name which is printed on invoices with the shipping address.
- Optional: **Contacts 2 - Contacts 5** (30,a) - the names of other customer employees.
- Optional: **Titles 1 - Titles 5** (30,a) - the job titles of the customer's employees designated as **Contacts 1 - Contacts 5**.
- Optional: **Ext. 1 - Ext. 5** (6,n) - the employee's telephone extension number.
- Optional: **Inter Dialing** (3,n) - the 3-digit code required for international calling.
- Optional: **Fax Phone** (10,n) - the customer's area code and telephone number for fax transmission.
- Optional: **Dataline** (10,n) - the customer's area code and telephone number for data transmission.

Contacts		Titles		Ext.	
1.	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____
4.	_____	_____	_____	_____	_____
5.	_____	_____	_____	_____	_____

Inter Dialing _____	Fax Phone _____	- _____	Dataline Phone _____	- _____
Store Classification (WAM) _____	Include For USG Reporting? _____		State Tax Id	_____
Federal Tax Id _____	Cigarette License _____	Tobacco License	Tax Group Password	_____
License 3	Retail Labels?	Allowance Based Retail	Exclude From Allowances?	_____
Frequent Mailing List _____	Invoice Trailer Report _____	QDN Customer Number _____	Exclude From Promos? _____	
Customer Start Date _____52622	MSA Customer Classification: _____	MSA Promotion Acceptance? _____	Cash & Carry Customer?	_____
Exclude Auto Merge Orders _____				

F3=Exit F24=Extended Information Roll=Next/Prev Screen

- Optional: **Store Classification(WAM)** (4,n) - the WAM code designating the customer's classification.
- Optional: **Federal Tax Id** (18,a) - the customer's federal tax identification number.
- Optional: **Cigarette License** (18,a) - the customer's cigarette license number. The value of **Cigarette License** appears on all versions of the invoice with the heading *Permit #*. Refer to **Tobacco License** field below concerning the customer's tobacco tax number.
- Optional: **License 3** (18,a) - the customer's license number. The data entered for **License 3** is not required for use by DAC directly, but can be used (with the IBM Query utility) to produce reports.
- Optional: **Retail Labels?** (1,a) - *Y* for yes designates that a retail label batch is created for this customer if the Work With Retail Label Batches application is used to create batches for multiple customers using the same criteria. Refer to the Retail Shelf Labels document for additional information.
- Optional: **Frequent Mailing List** (1,a) - *Y* for yes designates that the customer's address will be included when printing labels for a limited mailing. Refer to Printing Customer Address Labels below for information about the **Mailing List Only** field of the Customer Address Labels screen.
- Optional: **Invoice Trailer Report** (1,a) - *Y* for yes to print a list of unshipped (and shorted) items separately when printing invoices. The default value of **Invoice Trailer Report** is *N* for no. With the exception of invoice version C, the list is printed as a separate file. Refer to Appendix B (Invoice Trailer Report) of the Billing document for additional information.
- Display field: **Customer Start Date** (6,n) - the customer record's entry date.
- Optional: **MSA Customer Classification** (1,a) - *R* for retailer, *D* for distributor and *O* for other designates the customer's classification for

cigarette manufacturer reporting. Refer to Working With Unitrac of the Item File Maintenance document for additional information.

- Optional: **Exclude Auto Merge Orders** (1,a) - *Y* for yes designates that the customer's orders will not be merged if automatic merging is used. Entering a value for the **Exclude Auto Merge Orders** field is only required if **YES* is entered for the **Auto Merge Cust Orders** field of the SYS032 default system option. Refer to the DAC Default System Options document for additional information.

```

DSDBE3R  ADD  CDR Customer Conference  5/26/22 14:20:26
                Edit Customer Page 2
Customer 100008  STOP & GO

                Contacts                Titles                Ext.
1.  _____  _____  _____
2.  _____  _____  _____
3.  _____  _____  _____
4.  _____  _____  _____
5.  _____  _____  _____

Inter Dialing  ___  Fax Phone  ___  Dataline Phone  ___
Store Classification (WAM)  .  ___  Include For USG Reporting?  ___
Federal Tax Id  _____  State Tax Id  . . . .  ___
Cigarette License  _____  Tobacco License  . .  _____
License 3  . . . .  _____  Tax Group _ Password  . . . .  _____
Retail Labels?  . . . .  ___  Allowance Based Retail  . .  ___
Frequent Mailing List  ___  Exclude From Allowances?  .  ___
Invoice Trailer Report  ___  QDN Customer Number  _____
Customer Start Date  _52622  Exclude From Promos?  _____
MSA Customer Classification:  ___  MSA Promotion Acceptance?  ___
Exclude Auto Merge Orders  ___  Cash & Carry Customer?  . .  ___
F3=Exit  F24=Extended Information  Roll=Next/Prev Screen
    
```

- Optional: **Include For USG Reporting** (1,a) - *Y* for yes designates that the customer's data will be included in USG reports.
- Optional: **State Tax Id** (18,a) - the customer's state tax identification number.
- Optional: **Tobacco License** (18,a) - the customer's tobacco tax number should be entered for the **Tobacco License** field if it is required before a tobacco item can be ordered by the customer. The tax number can be printed on invoices only if invoice version B is used. Refer to **Cigarette License** and **License 3** fields above for additional information.
- Optional: **Tax Group** (1,a) - the code designating the customer's tax group for use with some state tax reporting.
- Optional: **Password** (8,a) - the customer's password for using Web Console, an optional module of DAC. Refer to the **Password** field of the Edit Corporate screen above for information about the corporate level password.
- Optional: **Allowance Based Retail** (1,a) - *Y* for yes designates that the customer's retail prices should be calculated after selling allowances are deducted. The default value of **Allowance Based Retail** is *N* for no. Refer to Working With Selling Allowances of the Billing File Maintenance document for additional information.
- Optional: **Exclude From Allowances?** (1,a) - *Y* for yes designates that list

prices of items which this customer orders are not calculated with selling allowances. The default value of **Exclude From Allowances?** is *N* for no. Refer to Working With Selling Allowances of the Billing File Maintenance document for additional information. Note: The **Exclude From Allowances?** field does not apply to the implementation of a buydown allowance type of vendor deal. Refer to Adding Buydown Allowance Deals of the Vendor Receivables document for additional information.

- Optional: **QDN Customer Number** (6,n) - the number assigned to the customer by Quality Distribution Network. This field will not appear unless *Y* is entered for the **QDN Active** field of the SYS040 default system option.
- Optional: **Exclude From Promos?** (1,a) - *Y* for yes designates that list prices of items which this customer orders are not calculated with salesman promotions. Refer to Working With Salesman Promotions of the Item File Maintenance document for additional information.
- Optional: **MSA Promotion Acceptance?** (1,a) - *N* for no designates that the customer does not accept cigarette promotional items. The value of the field, which defaults to *Y* for yes, is used for cigarette manufacturer reporting. Refer to Working With Unitrac of the Item File Maintenance document for additional information.
- Optional: **Cash & Carry Customer?** (1,a) - *Y* for yes designates that the customer is a cash and carry customer for use with some manufacturer reporting. Refer to Working With Unitrac of the Item File Maintenance document for additional information.

14. Press <Page Down> to continue adding data at the Edit Customer Page 3 screen.

```

DSDBE3R      CHANGE  CDR Customer Conference          5/26/22 14:47:36
                                Edit Customer Page 3

Customer Number . . : 100008      STOP & GO

Call Route 1 . . . . _____      Call Sequence 1 . . . . _____
Call Route 2 . . . . _____      Call Sequence 2 . . . . _____
Call Route 3 . . . . _____      Call Sequence 3 . . . . _____
Call Route 4 . . . . _____      Call Sequence 4 . . . . _____
Call Route 5 . . . . _____      Call Sequence 5 . . . . _____
Call Route 6 . . . . _____      Call Sequence 6 . . . . _____
Call Route 7 . . . . _____      Call Sequence 7 . . . . _____

Delivery Route 1 . . _____      Delivery Sequence 1 . . _____
Delivery Route 2 . . _____      Delivery Sequence 2 . . _____
Delivery Route 3 . . _____      Delivery Sequence 3 . . _____
Delivery Route 4 . . _____      Delivery Sequence 4 . . _____
Delivery Route 5 . . _____      Delivery Sequence 5 . . _____
Delivery Route 6 . . _____      Delivery Sequence 6 . . _____
Delivery Route 7 . . _____      Delivery Sequence 7 . . _____

Primary Delivery Route _____

F3=Exit  F4=Search  F5=Edit  Order Day/Time  Roll=Next/Prev Screen
  
```

15. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:

- Optional: **Call Route 1 - Call Route 7** (6,a) - a route code previously defined by the user. If necessary, press <F4> to select a route code from the Select Route Description screen. The **Call Route** fields correspond to the days of

the week, such that **Call Route 1** represents Monday, **Call Route 2** represents Tuesday, etc.

If a route code is entered for any of these fields, the Open Item Report By Salesman and customer statements can be printed by call route (per the day of the week). Refer to the Accounts Receivable document for additional information.

- Optional: **Call Sequence 1 - Call Sequence 7 (5,n)** - represent the customer's place, such as first, second and third, in the course of a sales representative's daily calls. For example, if the customer is the fourth to be visited by the sales rep on Friday, 4 is entered for **Call Sequence 5**.

The **Call Sequence** fields are used to print customer statements in the order of the sales calls. Note: The **Call Route** fields may be used without entering values for the **Call Sequence** fields.

- Optional: **Delivery Route 1 - Delivery Route 7 (6,a)** - a route code previously defined by the user. If necessary, press <F4> to select a route code from the Select Route Description screen. The **Delivery Route** fields correspond to the days of the week, such that **Delivery Route 1** represents Monday, **Delivery Route 2** represents Tuesday, etc.

The values of these fields are used to print pick lists and invoices. Refer to the Billing document for additional information.

- Optional: **Delivery Sequence 1 - Delivery Sequence 7 (5,n)** - represent the customer's place, such as first, second and third, on a delivery route. For example, if the customer is the third stop on Tuesday, 3 is entered for **Delivery Sequence 2**.

The **Delivery Sequence** fields are used to print pick lists in reverse order for loading trucks, but used to print invoices in ascending order for delivery stops. Note: The **Delivery Route** fields may be used without entering values for the **Delivery Sequence** fields.

- Optional: **Primary Delivery Route (6,a)** - a route code previously entered for a **Delivery Route** field. The value of this field can be used for printing pick lists and invoices for customer orders created with the Pre-book Ordering System. Refer to the Pre-book Orders document for additional information.

16. If desired, press <F5> (Edit Order Day/Time) to designate when the customer is expected to place an order.

```

DSALPVR  ENTER  CDR Customer Conference  5/26/22 14:49:55
                        Edit Order Day/Time

Customer Number : 100008  STOP & GO

Order Day 1 . -      Order Time 1 . _____
Order Day 2 . -      Order Time 2 . _____
Order Day 3 . -      Order Time 3 . _____
Order Day 4 . -      Order Time 4 . _____
Order Day 5 . -      Order Time 5 . _____
Order Day 6 . -      Order Time 6 . _____
Order Day 7 . -      Order Time 7 . _____

F3=Exit

```

This optional information may be entered to use the Verify Customer Orders application:

- The **Order Day 1 - Order Day 7** fields (1,a) represent Monday through Sunday, respectively. Enter *Y* for yes to designate the day(s) of the week that the customer's order is received. The default value of these fields is *N* for no.
- The **Order Time 1 - Order Time 7** fields (6,n) designate the time of day that the customer's order is received, and are provided for informational purposes only. Entering values in military time format, such as *1430* for 2:30 p.m. is recommended.

Refer to Verifying Customer Orders in the Billing document for additional information.

17. If necessary, press <F3> to exit the Edit Order Day/Time screen.
18. Press <Enter> when data entry at the Edit Customer pages is complete.
19. Press <Enter> when prompted to confirm. The Edit Cust From Search KEY SCREEN screen appears with the *Record added* message.

Refer to Editing Customer Master File Records for information about changing or adding data to the fields of customer records. Also described is the use of the F24 function key to add extended customer information including email addresses.

Customer Data Worksheets

Data entry is strongly recommended, or required by the system, for the fields displayed in **bold** type.

Add Corporate screen

Customer Corporate Number (6,n) _____ **Corporate Type** (I/C) _____
Controlled By Corp # (6,n) _____
Level Code (1,a) _____
Name (35,a) _____ Branch Code (6,a) _____
Addr 1 (30,a) _____
Addr 2 (30,a) _____
Addr 3 (30,a) _____ Country Code (3,a) _____
City (30,a) _____ **State** (2,a) _____ **Zip** (5-9,n) _____
Phone No (10,n) _____ Inter Dialing (3,n) _____
Fax Phone (10,n) _____ Account Rep Sales (6,a) _____ Statement Code (2,a) _____
Dataline (10,n) _____ Account Rep A/R (6,a) _____ Password (8,a) _____

Corporate Contacts (30,a)	Corporate Titles (30,a)
1. _____	1. _____
2. _____	2. _____
3. _____	3. _____
4. _____	4. _____
5. _____	5. _____

Email (70,a) _____
Email (70,a) _____

Edit Customer Page 1 screen

Customer Number (6,n) _____ **Corporate Number** (6,n) _____
Store Number (6,n) _____

Customer Name (35,a) _____

Address Line 1 (30,a) _____

Address Line 2 (30,a) _____

Address Line 3 (30,a) _____

City (30,a) _____ **St.** (2,a) _____

Zip Code (5-9,n) _____ **Phone #** (10,n) _____

Tax Jurisdiction (6,a) _____ **Branch Code** (6,a) _____ **G/L Code** (6,a) _____

BillTo Code (1,a) _____ **Late Charge Code** (Y/N) _____ **Percent:** (4.2,n) _____

Credit Limit (7,n) _____ **Terms Code** (3,a) _____

Sales Group (6,a) _____ **Marketing Rep.** (6,a) _____

Marketing Mgr (6,a) _____ **Marketing Dir** (6,a) _____

Demographic Code (4,a) _____ **Account Type** (4,a) _____

Price Hold Days (3,n) _____ **Authorized Item** (Y/N) _____ **Auth. U/M** (Y/N) _____

Surcharge Override (Y/N) _____ **Build-Up Code** (Y/N) _____

Billing Matrix (6,n) _____ **Retail Matrix** (6,n) _____

Subst. Code (1,a) _____ **Inv. Reprint Code** (1,n) _____

Service Type (1,a) _____ **Restk. Fee Ovr.** (Y/N) _____

Statement Code (2,a) _____ **Notify Price Chg.** (Y/N) _____

Edit Customer Page 2 screen - Customer Number _____

Contacts (30,a)	Titles (30,a)	Ext. (6,n)
1. _____	1. _____	1. _____
2. _____	2. _____	2. _____
3. _____	3. _____	3. _____
4. _____	4. _____	4. _____
5. _____	5. _____	5. _____

Inter Dialing (3,n) _____ Fax Phone (10,n) _____ Dataline Phone (10,n) _____

Store Classification(WAM) (4,n) _____ Include For USG Reporting? (Y/N) _____

Federal Tax Id (18,a) _____ State Tax Id (18,a) _____

Cigarette License (18,a) _____ Tobacco License (18,a) _____

License 3 (18,a) _____ Tax Group (1,a) _____ Password (8,a) _____

Retail Labels? (Y/N) _____ Allowance Based Retail (Y/N) _____

Frequent Mailing List (Y/N) _____ Exclude From Allowances? (Y/N) _____

Invoice Trailer Report (Y/N) _____ QDN Customer Number (6,n) _____

Customer Start Date (6, n) _____ Exclude From Promos? (Y/N) _____

MSA Customer Classification (1,a) _____ MSA Promotion Acceptance? (Y/N) _____

Exclude Auto Merge Orders (Y/N) _____ Cash & Carry Customer? (Y/N) _____

Customer Extended Information screen

Name (35,a) _____ SSN (9,n) _____

Address 1 (30,a) _____

Address 2 (30,a) _____

City (30,a) _____ State (2,a) _____ Zip (5-9,n) _____

Gender (1,a) _____ Birth Date (6,n) _____ DL# (20,n) _____ DL State (2,a) _____

Primary Email Address (70,a) _____

2nd Email Address (70,a) _____

International Postal Code (5-9,n) _____ Send Order Ack? (Y/N) _____

Shipping Information screen

Carrier (6,a) _____ Shipping Account (25,a) _____

Customer File Maintenance

Edit Customer Page 3 screen - Customer Number _____

Call Routes (6,a)

Monday: Call Route 1 _____
Tuesday: Call Route 2 _____
Wednesday: Call Route 3 _____
Thursday: Call Route 4 _____
Friday: Call Route 5 _____
Saturday: Call Route 6 _____
Sunday: Call Route 7 _____

Call Sequences (5,n)

Call Sequence 1 _____
Call Sequence 2 _____
Call Sequence 3 _____
Call Sequence 4 _____
Call Sequence 5 _____
Call Sequence 6 _____
Call Sequence 7 _____

Delivery Routes (6,a)

Monday: Delivery Route 1 _____
Tuesday: Delivery Route 2 _____
Wednesday: Delivery Route 3 _____
Thursday: Delivery Route 4 _____
Friday: Delivery Route 5 _____
Saturday: Delivery Route 6 _____
Sunday: Delivery Route 7 _____

Delivery Sequences (5,n)

Delivery Sequence 1 _____
Delivery Sequence 2 _____
Delivery Sequence 3 _____
Delivery Sequence 4 _____
Delivery Sequence 5 _____
Delivery Sequence 6 _____
Delivery Sequence 7 _____

Primary Delivery Route _____

Edit Order Day/Time screen

Order Days (Y/N)

Monday: Order Day 1 _____
Tuesday: Order Day 2 _____
Wednesday: Order Day 3 _____
Thursday: Order Day 4 _____
Friday: Order Day 5 _____
Saturday: Order Day 6 _____
Sunday: Order Day 7 _____

Order Times (6,n)

Order Time 1 _____
Order Time 2 _____
Order Time 3 _____
Order Time 4 _____
Order Time 5 _____
Order Time 6 _____
Order Time 7 _____

Editing Customer Master File Records

The Work With Customers application is used to change the customer-specific information stored in Customer Master file records. Refer to Editing Customer Corporate Master File Records for information about changing a customer's "bill to" information. Refer to Working With Customer Reports for information about printing Customer Master file changes and purging file changes.

The following steps describe using the Work With Customers screen to access a customer record that must be changed.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.
3. Select option 2 (Work With Customers) from the Customer Related #1 screen. The Work With Customers screen appears, and displays a list of customers with the status code of *A* for active.

Customer Name/Number		City	Zip	BMatrix	RMatrix	SlsRep	Type	Route	ST	SlsGrp	Sts	Whs
												A
2=Edit Customer 3=EDI Options 5=Edit Options C=Copy N=Notes S=Score												
?	Name	City	Cust #	BMatrix	RMatrix	SlsRep	TaxJur	PrmRte	ST	SlsGrp	Sts	
-	ABC STORE	MANDEVILLE	500121			20	LA0001	410	LA		A	
-	B AND D FOOD STORE #230	HOUSTON	771230	200	10	20	TX0001	120	TX		A	
-	BARON EXPRESS #2 BP	MANDEVILLE	100801			20	LA0001	300	LA		A	
-	BIG JOHN'S QUICK STOP #1	COVINGTON	260501			20	LA0001	100	LA		A	
-	BIG JOHN'S QUICK STOP #2	COVINGTON	260502			20	LA0001	410	LA		A	
-	BIG P MINI MART	LONG BEACH	320001			20	MS0001	200	MS		A	
-	BOB'S SHELL	COVINGTON	100003			45	LA0001	100	LA		A	
-	CRANKY CORNER QUICK STOP	FOLSOM	100802	200		20	LA0001	300	LA		A	
-	DANNY & CLYDE'S FOOD #20	COVINGTON	800237			20	LA0001	400	LA		A	
-	DIANNE'S GROCERY	COVINGTON	100002			20	LA0001	100	LA		A	
-	EXPRESS WAY FOOD MART	FOLSOM	100850			45	LA0001	300	LA		A	
-	GAS-N-SHOP #6	ABITA SPRINGS	100855	100		45	LA0001	210	LA		A	
-	JR FOOD MART - ABITA	ABITA SPRINGS	100900	100		20	LA0001	210	LA		A	
-	JR FOOD MART - FOLSOM	FOLSOM	100857			20	LA0001	300	LA		A	
-	KINGS FOREST EXXON	COVINGTON	800333	200		45	LA0001	400	LA		A	
-	KINGS GROCERY	BILOXI	320033			30	MS0001	200	MS		A	+

F3=Exit F4=Search F7=Search By Owner F16=Extended Restrictors

Customer names that appear highlighted in the list designate customer records for which notes are entered. Refer to Adding Customer Notes for additional information.

2. If records for customers with a different status code must be edited, press <Tab> to move the cursor to the **Status Code** field. Enter *I* for inactive, *D* for delete or press <Field Exit> to leave the field blank for all status codes. Press <Enter> and the list is redisplayed.

3. Enter the desired customer's number for **Customer Name/Number**, press <Enter> and the Edit Customer Page 1 screen appears, or use one of the following methods to locate the desired customer in the screen's list:

- Press <F7> to use the **Owner Name** field of the Display Customer Info screen to search for the desired customer. After locating the customer, press <F3> to return to the Work With Customers screen.
- Enter a portion of the customer's name, beginning with the first letter, for **Customer Name/Number**, press <Enter> and the list is redisplayed beginning with customer names matching the text entered.
- Use one or more of the restrictor fields at the top of the screen to limit the list to include only those customers who have data which precisely matches what is entered. For example, by entering a route code of the desired customer for **Delivery Route**, and pressing <Enter>, the list is redisplayed with only those customers who are on the specified route.
- Press <F4> to redisplay the customers in the Select Customer (Contains) screen, and use one or more of the restrictor fields at the top of the screen (illustrated below) to locate the desired customer.

```

HIULSRR  SELECT  CDR Customer Conference          7/19/21 10:36:23
                Select Customer(Contains)
Customer Name      Rep.  Corp#  State  Zip  Phone  Sts
-----
City _____  Addr1 _____
Type options, press Enter.
X>Select request  N=Customer Notes

?      Customer Name          Phone      Rep.  Corp#  Cust#  Status
- 99 MART PLUS                713 770-3600 20    99000  99000  A
- STOP 'N SHOP                985 892-1258 10    100001 100001 A
- DIANNE'S GROCERY            985 892-0058 20    100002 100002 A
- BOB'S SHELL                 985 871-5151 KIM  771000 100003 A
- SNYDER'S STOP & GO          985 624-0251 10    100004 100004 A
- TODD'S COUNTRY CORNER       985 893-2424 10    100222 100222 A
- THREE RIVERS CHEVRON        985 892-9363 10    100301 100301 A
- BARON EXPRESS #2 BP         985 727-1141 20    771000 100801 A
- CRANKY CORNER QUICK STOP    985 796-8111 20    100802 100802 A
- EXPRESS WAY FOOD MART       985 893-0099 JP   100850 100850 A
- GAS-N-SHOP #6               985 892-9919 45    100855 100855 A +
F3=Exit

```

4. After locating the desired customer in the Work With Customers screen (use <Page Down> or <Page Up> if necessary), enter 2 (Edit Customer) in the selection column next to the customer's name and press <Enter>. The Edit Customer Page 1 screen appears. Refer to Adding Customer Records for detailed descriptions of the fields of this screen.

```

DSDBE3R  CHANGE  CDR Customer Conference  7/19/21 11:02:51
                                Edit Customer Page 1
Customer Number : 320001      Corporate Number 320001
Status Code : A      Store Number . :
Customer Name . . BIG P MINI MART
Address Line 1 . . 19191 COMMISSION ROAD
Address Line 2 . .
Address Line 3 . .
City . . . . . LONG BEACH      St MS
Zip Code . . . . . 39560 - 0000      Phone # . . . 601 - 8687050
Tax Jurisdiction . MS0001      Branch Code      G/L Code
BillTo Code . . .      Late Charge Code Y Percent:
Credit Limit . . .      Terms Code . . . 024
Sales Group . . .      Marketing Rep. . 20
Marketing Mgr . . .      Marketing Dir .
Demographic Code .      Account Type . . LRG
Price Hold Days .      Authorized Item Y Auth. U/M
Surcharge Override N      Build-Up Code .
Billing Matrix . .      Retail Matrix .
Subst. Code . . . Y      Inv. Reprint Code
Service Type . . .      Restk. Fee Ovr. N
Statement Code . . A5      Notify Price Chg. Y
F3=Exit F4=Search F2=Change Corp/Store F6=Notes Roll=Next Screen

```

The function keys which appear at the bottom of the Edit Customer Page 1 screen are used as follows:

- F2 (Change Corp. No.) - allows users to change **Corporate Number** which is used to access the customer's "ship to" information.
- F3 (Exit) - returns user to the previous screen.
- F4 (Search) - provides customer-related assistance for entering and changing the customer's tax jurisdiction, branch code, terms code, sales group, marketing representative, marketing manager, marketing director, demographic code, billing matrix and retail matrix. Before pressing <F4>, the cursor must be located at the field, such as **Tax Jurisdiction**, for which assistance is desired.
- F6 (Notes) - allows users to add notes concerning the customer. Refer to Adding Customer Notes for additional information.

5. Use <Page Down> to view and edit the fields of the Edit Customer Page 2 screen. Refer to Adding Customer Records for detailed descriptions of the fields of this screen.

```

DSDBE3R  CHANGE  CDR Customer Conference  7/19/21 11:13:43
                                Edit Customer Page 2
Customer 320001  BIG P MINI MART

Contacts      Titles      Ext.
1. FRANK DOBBS
2.
3.
4.
5.

Inter Dialing  Fax Phone 601 - 4658999  Dateline Phone
Store Classification (WAM)  Include For USG Reporting?
Federal Tax Id 10-3838837  State Tax Id . . .
Cigarette License  Tobacco License . . 635188276
License 3 . . .      Tax Group Password . . .
Retail Labels? . . . Allowance Based Retail . . Y
Frequent Mailing List  Exclude From Allowances? .
Invoice Trailer Report N  QDN Customer Number
Customer Start Date 32607  Exclude From Promos?
MSA Customer Classification: R  MSA Promotion Acceptance? Y
Exclude Auto Merge Orders  Cash & Carry Customer? .
F3=Exit F24=Extended Information Roll=Next/Prev Screen

```

6. If necessary, press <F24> to edit the following fields of the Customer Extended Information screen:
- Optional: **Name** (35,a) - owner's name.
 - Optional: **SSN** (9,n) - owner's social security number. Contact CDR support personnel for information about accessing this non-display field.
 - Optional: **Address 1** (30,a) - street number and street name of the owner's address.
 - Optional: **Address 2** (30,a) - additional address information, such as apartment number, of the owner's address.
 - Optional: **City** (30,a) - the city of the owner's address.
 - Optional: **State** (2,a) - the state of the owner's address.
 - Optional: **Zip** (5-9,n) - the zip code and 4-digit extension of the owner's address.
 - Optional: **Gender** (1,a) - owner's gender.
 - Optional: **Birth Date** (6,n) - owner's date of birth.
 - Optional: **DL#** (20,n) - number of the owner's driver's license. Contact CDR support personnel for information about accessing this non-display field.
 - Optional: **DL# State** (1,a) - state of the owner's driver's license. Contact CDR support personnel for information about accessing this non-display field.
 - Optional: **Primary Email Address** (70,a) - customer's primary email address.
 - Optional: **2nd Email Address** (70,a) - a second email address used for order email confirmation.
 - Optional: **International Postal Code** (5-9,n) - the postal code and 4-digit extension of the owner's international address.
 - Optional: **Send Order Ack?** (1,a) - Y is entered to designate that the email addresses are used for price change notifications and remote order email confirmation.

Refer to Adding Customer Email Addresses of the System File Maintenance document for information about using the Work With Customer Emails application to edit the address fields of multiple customer master records more quickly.

Refer to Working With Document Distribution Records of the System File Maintenance document for information about using customer email addresses for remote order confirmations, and emailing velocity reports, pre-book notifications, price change notifications, invoices and more.

If changes are made to the fields of the Customer Extended Information screen, press <Enter> when done, and again when prompted to confirm.

7. Use <Page Down> to view and edit the fields of the Edit Customer Page 3 screen. Refer to Adding Customer Records for detailed descriptions of the fields of this screen.

```

DSDBE3R  CHANGE  CDR Customer Conference          7/19/21 11:53:39
                                Edit Customer Page 3

Customer Number . . : 320001  BIG P MINI MART

Call Route 1 . . . . 100_____  Call Sequence 1 . . . . _____
Call Route 2 . . . . _____  Call Sequence 2 . . . . _____
Call Route 3 . . . . _____  Call Sequence 3 . . . . _____
Call Route 4 . . . . _____  Call Sequence 4 . . . . _____
Call Route 5 . . . . _____  Call Sequence 5 . . . . _____
Call Route 6 . . . . _____  Call Sequence 6 . . . . _____
Call Route 7 . . . . _____  Call Sequence 7 . . . . _____

Delivery Route 1 . . _____  Delivery Sequence 1 . . _____
Delivery Route 2 . . 200_____  Delivery Sequence 2 . . _____5
Delivery Route 3 . . _____  Delivery Sequence 3 . . _____
Delivery Route 4 . . _____  Delivery Sequence 4 . . _____
Delivery Route 5 . . _____  Delivery Sequence 5 . . _____
Delivery Route 6 . . _____  Delivery Sequence 6 . . _____
Delivery Route 7 . . _____  Delivery Sequence 7 . . _____

Primary Delivery Route 200_____
F3=Exit  F4=Search  F5=Edit Order Day/Time  Roll=Next/Prev Screen

```

- If necessary, press <F5> to change the customer's ordering days and times. The Edit Order Day/Time screen appears. Refer to Adding Customer Records for detailed descriptions of the fields of this screen.

```

DSALPVR  ENTER  CDR Customer Conference          7/19/21 11:58:07
                                Edit Order Day/Time

Customer Number : 320001  BIG P MINI MART

Order Day 1 . . Y      Order Time 1 . . 14:00
Order Day 2 . . -      Order Time 2 . . _____
Order Day 3 . . -      Order Time 3 . . _____
Order Day 4 . . -      Order Time 4 . . _____
Order Day 5 . . -      Order Time 5 . . _____
Order Day 6 . . -      Order Time 6 . . _____
Order Day 7 . . -      Order Time 7 . . _____

F3=Exit

```

If changes are made to the fields of the Edit Order Day/Time screen, press <Enter> when done, and again when prompted to confirm. If no changes are made, press <F3> to exit. In both cases, the Edit Customer Page 3 screen appears.

- Press <Enter> when changes to the Edit Customer pages are complete.
- Press <Enter> when prompted to confirm. The Edit Customer screen will appear with the *Record changed* message displayed at the bottom.

```
DSDBE3R      CHANGE  CDR Customer Conference      7/19/21 12:00:17
                                Edit Customer

Customer Number .  320001

F3=Exit  F9=Go to 'Add' mode
Record changed.
```

11. To continue editing customer records, use one of the following methods to access the Edit Customer pages of the desired customer:
 - Enter the customer's number for **Customer Number**, press <Enter>, and the Edit Customer Page 1 screen appears, or
 - Press <F3> for exit, and the Work With Customers screen appears. Note: Delete previous entries for **Customer Name/Number** or restrictor fields of the Work With Customers screen (and press <Enter>) to redisplay its complete list. Repeat the instructions above to locate the desired customer in the screen's list and edit its record.
12. When no other customer records require editing, press <F3> to exit from the Edit Customer screen. The Work With Customers screen appears.

The following steps describe using the Work With Corporates/Customers application to more easily access and edit the records of chain customers.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.
3. Select option 1 (Work With Corporates/Customers) from the Customer Related #1 screen. The Display Corporate by Name screen appears, and displays a list of customers with the status code of *A* for active.

```

DSC9DFR   DISPLAY CDR Customer Conference           7/19/21 12:29:31
                Display Corporate by Name
Corporate Name      Type  Lvl  Sts
-----
Corp. Number

Type options, press Enter.
2=Edit  5=Work With  N=Notes

? Corporate Name      Corporate #  Level Description
- ABC STORE          500121
      MANDEVILLE      LA          Type I      Status A
- B & D FOOD STORE   771230
      HOUSTON         TX          Type I      Status A
- B'S FOOD STORE GROUP - CORP  771000
      HOUSTON         TX          Type C      Status A
- BARON EXPRESS #2 BP  100801
      MANDEVILLE      LA          Type I      Status A
- BIG JOHN'S QUICK STOP  265000
      FOLSOM          LA          Type C      Status A +

F3=Exit  F10=Enter new record

```

4. Enter **C** for **Type** and press <Enter>.

```

DSC9DFR   DISPLAY CDR Customer Conference           7/19/21 12:40:39
                Display Corporate by Name
Corporate Name      Type  Lvl  Sts
-----
Corp. Number

Type options, press Enter.
2=Edit  5=Work With  N=Notes

? Corporate Name      Corporate #  Level Description
- ABC STORE          500121
      MANDEVILLE      LA          Type I      Status A
- B & D FOOD STORE   771230
      HOUSTON         TX          Type I      Status A
- B'S FOOD STORE GROUP - CORP  771000
      HOUSTON         TX          Type C      Status A
- BARON EXPRESS #2 BP  100801
      MANDEVILLE      LA          Type I      Status A
- BIG JOHN'S QUICK STOP  265000
      FOLSOM          LA          Type C      Status A +

F3=Exit  F10=Enter new record

```

5. Enter **5** (Work With) in the selection column next to the customer's name and press <Enter>. The Select Customer from Corp screen appears.

```

DSC7DFR   DISPLAY CDR Customer Conference           7/19/21 12:43:57
                Select Customer from Corp
Corp.  Corporate
Number Name
380100 MISSISSIPPI STOP N GO CORPORATE

Type options, press Enter.
2=Edit Customer Record  5=Edit Customer Options

? Customer Name      Customer City  ST Cust #
- MISS STOP N GO #110  BRANCH        MS 380110
- MISS STOP N GO #120  JACKSON       MS 380120
- MISS STOP N GO #130  NORTH BRANCH  MS 380130
- MISSISSIPPI STOP N GO  RIVER CITY    MS 380100

F3=Exit  F10=Enter new record

```

6. Enter **2** (Edit Customer Record) in the selection column next to the customer's name and press <Enter>. The Edit Customer Page 1 screen appears. Refer to the preceding instructions of this section for information about editing the Edit Customer pages.

Editing Customer Corporate Master File Records

The Work With Corporates/Customers application is used to change customers' "bill to" information which is stored in Customer Corporate Master file records. Refer to Editing Customer Master File Records for information about changing other customer-specific information, such as shipping address, account salesman, payment terms, etc. Refer to Working With Customer Reports for information about printing Customer Corporate Master file changes and purging file changes.

The following steps describe using the Display Corporate by Name screen to access a customer record that must be changed. Refer to Adding Customer Records for detailed descriptions of the record's fields.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen, select option 1 (Customer Related Maintenance) from the File Maintenance screen, and select option 1 (Work With Corporates/Customers) from the Customer Related #1 screen. The Display Corporate by Name screen appears, and displays a list of customers with the status code of *A* for active.

```

DSC9DFR   DISPLAY CDR Customer Conference           6/03/22 13:58:01
                Display Corporate by Name
Corporate Name      Type  Lvl  Sts
-----
Corp. Number _____
Type options, press Enter.
2=Edit  5=Work With  N=Notes

? Corporate Name      Corporate #  Level Description
- ABC STORE          500121
  MANDEVILLE          LA          Type I      Status A
- B & D FOOD STORE   771230
  HOUSTON             TX          Type I      Status A
- B'S FOOD STORE GROUP - CORP  771000
  HOUSTON             TX          Type C      Status A
- BARON EXPRESS #2 BP  100801
  MANDEVILLE          LA          Type I      Status A
- BIG JOHN'S QUICK STOP  265000
  FOLSOM              LA          Type C      Status A +

F3=Exit  F10=Enter new record
  
```

2. If records for customers with a different status code must be edited, press <Tab> to move the cursor to the **Status Code** field. Enter *I* for inactive, *D* for delete or press <Field Exit> to leave the field blank for all status codes. Press <Enter> and the list is redisplayed.
3. Press <Page Down> to locate the desired customer's name in the screen's list, or use one of the following methods:
 - Enter a portion of the customer's name, beginning with the first letter, for **Corporate Name**, press <Enter> and the list is redisplayed beginning with customer names matching the text entered, or
 - Use one or more of the restrictor fields at the top of the screen to limit the list to include only those customers who have data which precisely matches what is entered. In this instance, entering *C* for **Corporate Type**, and pressing <Enter> is recommended.

If the *Scan limit reached...* message appears, use <Page Down> to continue searching for customers who match the criteria entered.

4. Enter 2 (Edit) in the selection column next to the customer's name and press <Enter>. The Edit Corp screen appears.

```

DSEHE1R  CHANGE  CDR Customer Conference  6/03/22 14:05:54
                                Edit Corporate
Customer Corp. #: 380000          Corporate Type . : C Sts A
                                Controlled By Corp# _____
Name . . . MISSISSIPPI STOP N GO CORPORATE  Level Code _____
Addr 1 . . PO BOX 1190                Branch Code . _____
Addr 2 . . 1235 RIVER RD                _____
Addr 3 . .                               _____
City . . . RIVER CITY                    Country Code _____
                                State MS Zip 32333 - 0000

Phone no. 601 - 5554443  Inter Dialing . . . _____
Fax Phone _____ Account Rep Sales . . . Statement Code _____
Dateline _____ Account Rep A/R . . . DAVID Password _____

Corporate Contacts          Corporate Titles
1 _____ 1 _____
2 _____ 2 _____
3 _____ 3 _____
4 _____ 4 _____
5 _____ 5 _____
Email _____
Email _____
F3=Exit  F4=Search

```

5. The **Corporate Type** (1,a) of an individual customer's record (*I*) can be changed, if necessary, to *C* for chain customer. Refer to the introductory text of Working With Customers for information about individual and chain customers.
6. Make changes, as necessary, to the remaining fields of the Edit Corp screen and press <Field Exit> after each entry.
7. Press <Enter> when the changes are complete.
8. Press <Enter> when prompted to confirm. The Display Corporate by Name screen will appear with the name of the customer whose record was changed displayed for the **Corporate Name** field.

```

DSC9DFR  DISPLAY CDR Customer Conference  6/03/22 14:14:26
                                Display Corporate by Name
Corporate Name          Type  Lvl  Sts
MISSISSIPPI STOP N GO CORPORATE  -   -   A

Corp. Number _____

Type options, press Enter.
2=Edit  5=Work With  N=Notes

? Corporate Name          Corporate #  Level Description
- MISSISSIPPI STOP N GO CORPORATE  380000
  RIVER CITY                MS          Type C  Status A
- OCEAN SPRINGS QUICK STOP  320055
  OCEAN SPRINGS            MS          Type I  Status A
- PACKS FOOD STORE          770060
  HOUSTON                  TX          Type I  Status A
- PARK IT MARKET           770005
  HOUSTON                  TX          Type I  Status A
- SAIA'S SUPERMARKET       300133
  FOLSOM                   LA          Type I  Status A +

F3=Exit  F10=Enter new record

```

9. Locate another customer record in the Display Corporate by Name screen and continuing editing, or press <F3> to exit.

Deleting Customer Records

A customer record is qualified for deletion if there is no year-to-date sales activity, no accounts receivable activity and no weekly analysis activity associated with it.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen, and select option 19 (Deletions) from the File Maintenance screen. The Deletion Menu screen appears.

```

User: JEANNINE           Menu: DLTCV1           Date: 2/12/10

===== > D E L E T I O N   M E N U <=====
=====
|||||||
THE   ||           1. Delete Qualified Customers
DAC   ||           2. Delete Qualified Items
SYSTEM ||         3. Delete Qualified Buying Allowances
|||||||           4. Delete Qualified Analysis Records
|||           5. Delete Qualified Tax Records
|||           6. Delete Qualified Promo Records
|||           7. Delete Qualified Inventory History Records
|||           8. Reorganize Above History Files
|||           9. Expire Deleted Customer Price Contracts
|||          10. Expire Deleted Customer Retail Contracts
|||          11. Delete Qualified Customer Weekly Analysis Rcds.
|||           M E N U   C A L L S
19.           20.           21.
22. File Maintenance 23. Dac Main Menu 90. Sign Off
=====
COPYRIGHT @1992-2004@ Creative Data Research, Inc.

==>

```

2. Select option 1 (Delete Qualified Customers) from the Deletion Menu screen. The Edit Corporate Status Codes screen appears.

```

DSFMDFR   DISPLAY Creative Data Research-SUPPORT           5/21/99 15:42:43
                Edit Corporate Status Codes
Corporate Name           Corp. Type Status
                        Number

Type options, press Enter.
A=Activate  D=Delete  I=Inactivate  5=Work With

? Corporate Name           Corp. Type Status
                        Number
AMERICAN CHICLE           101275 I   A
AMERICAN LEGION (GUNTERSVILLE) 101401 I   I
5 APPLETREE VENDING       300100 C   A
ARAB MARKET & DELI       154700 I   A
ATCHLEY'S SERVICE STATION 102200 I   A
ATLANTIS DEVELOPMENT, INC 102235 I   A
AUSTINVILLE SHELL       102275 I   A
AUTOMATIC VEND X-RT 1    103325 C   A
AUTOMATIC VENDING       300200 C   A
AYSL                     100076 I   A
                        +

F3=Exit  F10=Drop All Qualified Records

```

3. To delete the record of a chain customer, enter 5 (Work With) in the selection column next to the customer's corporate name, and press <Enter>. The Mark Customer Status Codes screen appears with the customer status code displayed next to the customer number.

```

DSQJDFR   DISPLAY Creative Data Research-SUPPORT           5/21/99 15:44:56
                                Mark Customer Status Codes
Corporate                                     Corp  Customer  Store
Name                                           Number  Status   Number
APPLETREE VENDING                            300100

Type options, press Enter.
A=Activate  D=Delete  I=Inactivate

? Customer Name                               Customer City           Cust #
D BUFFERS MARKET                             NATCHEZ                 102100 A
  BUFFORD STOP & SAVE                         COLUMBIA                102000 A

F3=Exit

```

4. Enter *D* (Delete) in the selection column next to the customer's name, and press <Enter>. The customer status code changes to *D* (for delete).

```

DSQJDFR   DISPLAY Creative Data Research-SUPPORT           5/21/99 15:45:39
                                Mark Customer Status Codes
Corporate                                     Corp  Customer  Store
Name                                           Number  Status   Number
APPLETREE VENDING                            300100

Type options, press Enter.
A=Activate  D=Delete  I=Inactivate

? Customer Name                               Customer City           Cust #
  BUFFERS MARKET                             NATCHEZ                 102100 D
  BUFFORD STOP & SAVE                         COLUMBIA                102000 A

F3=Exit

```

5. Press <F3> (Exit). The Edit Corporate Status Codes screen appears.

```

DSFMDFR   DISPLAY Creative Data Research-SUPPORT           5/21/99 15:46:55
                                Edit Corporate Status Codes
Corporate Name                               Corp.  Type  Status
                                           Number
APPLETREE VENDING

Type options, press Enter.
A=Activate  D=Delete  I=Inactivate  5=Work With

? Corporate Name                               Corp.  Type  Status
                                           Number
APPLETREE VENDING                            300100 C   A
ARAB MARKET & DELI                          154700 I   A
ATCHLEY'S SERVICE STATION                   102200 I   A
ATLANTIS DEVELOPMENT, INC                   102235 I   A
AUSTINVILLE SHELL                           102275 I   A
AUTOMATIC VEND X-RT 1                       103325 C   A
AUTOMATIC VENDING                           300200 C   A
AYSL                                          100076 I   A
B & B DISCOUNT GROCERIES                   104710 I   I
B & B QUICK STOP                             104720 I   A      +

F3=Exit  F10=Drop All Qualified Records

```

6. To delete the record of an individual customer, enter *D* (Delete) in the selection column next to the customer's name, and press <Enter>. The customer status code changes as to *D* (Delete).
7. Press <F10> (Drop All Qualified Records). Records that do not qualify for deletion will maintain the delete request status, and can be removed when they are eligible in the future.

Changing Customer Status

The following instructions describe changing the status code of an individual customer's record and a chain customer's record to *I* (Inactive) after which users cannot enter orders for the customer. The screens illustrated below can also be used to change the status code to *A* (Active).

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen, and select option 19 (Deletions) from the File Maintenance screen. The Deletion Menu screen appears.

```

User: JEANNINE           Menu: DLTCV1           Date: 8/14/12

===== > D E L E T I O N   M E N U <=====
=====
|||||||
THE   ||           1. Delete Qualified Customers
DAC   ||           2. Delete Qualified Items
SYSTEM ||          3. Delete Qualified Buying Allowances
|||||||           4. Delete Qualified Analysis Records
|||           5. Delete Qualified Tax Records
||           6. Delete Qualified Promo Records
||           7. Delete Qualified Inventory History Records
||           8. Reorganize Above History Files
||           9. Expire Deleted Customer Price Contracts
||          10. Expire Deleted Customer Retail Contracts
||          11. Delete Qualified Customer Weekly Analysis Rcds.
||          M E N U   C A L L S
19.          20.          21.
22. File Maintenance  23. Dac Main Menu  90. Sign Off
=====
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==>

```

2. Select option 1 (Delete Qualified Customers) from the Deletion Menu screen. The Edit Corporate Status Codes screen appears.

```

DSFMDFR   DISPLAY CDR Customer Conference           8/14/12  9:26:33
                Edit Corporate Status Codes
Corporate Name           Corp. Type Status
                        Number
-----
Type options, press Enter.
A=Activate D=Delete I=Inactivate 5=Work With

? Corporate Name           Corp. Type Status
                        Number
- ABC STORE                500121 I   A
- B & D FOOD STORE         771230 I   A
- BARON EXPRESS #2 BP     100801 I   A
- BIG JOHN'S QUICK STOP   265000 C   A
- BIG P MINI MART         320001 I   A
- BOB'S SHELL             100003 I   A
- CRANKY CORNER QUICK STOP 100802 I   A
- DANNY & CLYDE'S FOOD STORE #20 800237 I   A
- DIANNE'S GROCERY        100002 I   A
- EXPRESS WAY FOOD MART   100850 I   A
                        +

F3=Exit  F10=Drop All Qualified Records

```

3. To change the status of an individual customer, enter *I* (Inactivate) in the selection column next to the customer's name.

```

DSFMDFR   DISPLAY CDR Customer Conference           8/14/12  9:27:39
                Edit Corporate Status Codes
Corporate Name                Corp. Type Status
                               Number
-----
Type options, press Enter.
A=Activate  D=Delete  I=Inactivate  5=Work With

? Corporate Name                Corp. Type Status
                               Number
- ABC STORE                    500121 I  A
- B & D FOOD STORE             771230 I  A
I BARON EXPRESS #2 BP         100801 I  A
- BIG JOHN'S QUICK STOP       265000 C  A
- BIG P MINI MART             320001 I  A
- BOB'S SHELL                 100003 I  A
- CRANKY CORNER QUICK STOP    100802 I  A
- DANNY & CLYDE'S FOOD STORE #20 800237 I  A
- DIANNE'S GROCERY           100002 I  A
- EXPRESS WAY FOOD MART       100850 I  A
                                     +

F3=Exit  F10=Drop All Qualified Records

```

4. Press <Enter>. The customer's status code changes to *I* (Inactive).

```

DSFMDFR   DISPLAY CDR Customer Conference           8/14/12  9:29:33
                Edit Corporate Status Codes
Corporate Name                Corp. Type Status
                               Number
-----
Type options, press Enter.
A=Activate  D=Delete  I=Inactivate  5=Work With

? Corporate Name                Corp. Type Status
                               Number
- ABC STORE                    500121 I  A
- B & D FOOD STORE             771230 I  A
- BARON EXPRESS #2 BP         100801 I  I
- BIG JOHN'S QUICK STOP       265000 C  A
- BIG P MINI MART             320001 I  A
- BOB'S SHELL                 100003 I  A
- CRANKY CORNER QUICK STOP    100802 I  A
- DANNY & CLYDE'S FOOD STORE #20 800237 I  A
- DIANNE'S GROCERY           100002 I  A
- EXPRESS WAY FOOD MART       100850 I  A
                                     +

F3=Exit  F10=Drop All Qualified Records

```

5. Press <F3> (Exit). The Edit Corporate Status Codes screen appears.

6. To change the status of a chain customer, enter 5 (Work With) in the selection column next to the customer's corporate name, and press <Enter>. The Mark Customer Status Codes screen appears with the customer status code displayed next to the customer number.

```

DSQJDFR   DISPLAY CDR Customer Conference           8/14/12  9:37:38
                Mark Customer Status Codes
Corporate Name                Corp Customer Store
Name                        Number Status Number
USA CONVENIENCE HEADQUARTERS 900100 -
Type options, press Enter.
A=Activate  D=Delete  I=Inactivate

? Customer Name                Customer City                Cust #
- USA CONVENIENCE STORE #200    METAIRIE                    900200 A
- USA CONVENIENCE STORE #300    COVINGTON                   900300 A
- USA CONVENIENCE STORE #400    LACOMBE                     900400 A
- USA CONVENIENCE STORE #500    COVINGTON                   900500 A
- USA CONVENIENCE STORE #600    COVINGTON                   900600 A

F3=Exit

```

7. Enter *I* (Inactivate) in the selection column next to the customer's name.

```

DSQJDFR  DISPLAY CDR Customer Conference      8/14/12  9:37:38
                Mark Customer Status Codes
Corporate      Corp      Customer      Store
Name           Number  Status      Number
USA CONVENIENCE HEADQUARTERS      900100      -      _____

Type options, press Enter.
A=Activate  D=Delete  I=Inactivate

? Customer Name      Customer City      Cust #
_ USA CONVENIENCE STORE #200      METAIRIE      900200 A
_ USA CONVENIENCE STORE #300      COVINGTON      900300 A
I USA CONVENIENCE STORE #400      LACOMBE      900400 A
_ USA CONVENIENCE STORE #500      COVINGTON      900500 A
_ USA CONVENIENCE STORE #600      COVINGTON      900600 A

F3=Exit

```

8. Press <Enter>. The customer's status code changes to *I* (Inactive).

```

DSQJDFR  DISPLAY CDR Customer Conference      8/14/12  9:37:38
                Mark Customer Status Codes
Corporate      Corp      Customer      Store
Name           Number  Status      Number
USA CONVENIENCE HEADQUARTERS      900100      -      _____

Type options, press Enter.
A=Activate  D=Delete  I=Inactivate

? Customer Name      Customer City      Cust #
_ USA CONVENIENCE STORE #200      METAIRIE      900200 A
_ USA CONVENIENCE STORE #300      COVINGTON      900300 A
_ USA CONVENIENCE STORE #400      LACOMBE      900400 I
_ USA CONVENIENCE STORE #500      COVINGTON      900500 A
_ USA CONVENIENCE STORE #600      COVINGTON      900600 A

F3=Exit

```

9. Press <F3> to exit. The Edit Corporate Status Codes screen appears.

```

DSFMDFR  DISPLAY CDR Customer Conference      8/14/12  9:50:11
                Edit Corporate Status Codes
Corporate Name      Corp.  Type  Status
                  Number
USA CONVENIENCE HEADQUARTERS      _____ - -

Type options, press Enter.
A=Activate  D=Delete  I=Inactivate  5=Work With

? Corporate Name      Corp.  Type  Status
                  Number
_ USA CONVENIENCE HEADQUARTERS      900100 C  A
_ 99 MART PLUS      99000 I  A

F3=Exit  F10=Drop All Qualified Records

```

10. Press <F3> to exit. The Deletion Menu appears.

Copying Customer Records

If the record of a chain customer is copied, the new record is linked to the same corporate chain. Refer to the introductory text of Working With Customers for additional information about individual and chain customers.

The following steps describe using the Work With Customers screen to add new customer records by copying previously added records.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.
3. Select option 2 (Work With Customers) from the Customer Related #1 screen. The Work With Customers screen appears.

Customer Name/Number		City	Zip	BMatrix	RMatrix	SlsRep	Type	Route	ST	SlsGrp	Sts	Whs
2=Edit Customer 3=EDI Options 5=Edit Options C=Copy N=Notes S=Score												
?	Name	City	Cust #	BMatrix	RMatrix	SlsRep	TaxJur	PrmRte	ST	SlsGrp	Sts	
-	ABC STORE	MANDEVILLE	500121			20	LA0001	410	LA		A	
-	B AND D FOOD STORE #230	HOUSTON	771230	200	10	20	TX0001	120	TX		A	
-	BARON EXPRESS #2 BP	MANDEVILLE	100801			20	LA0001	300	LA		A	
-	BIG JOHN'S QUICK STOP #1	COVINGTON	260501			20	LA0001	100	LA		A	
-	BIG JOHN'S QUICK STOP #2	COVINGTON	260502			20	LA0001	410	LA		A	
-	BIG P MINI MART	LONG BEACH	320001			20	MS0001	200	MS		A	
-	BOB'S SHELL	COVINGTON	100003			45	LA0001	100	LA		A	
-	CRANKY CORNER QUICK STOP	FOLSOM	100802	200		20	LA0001	300	LA		A	
-	DANNY & CLYDE'S FOOD #20	COVINGTON	800237			20	LA0001	400	LA		A	
-	DIANNE'S GROCERY	COVINGTON	100002			20	LA0001	100	LA		A	
-	EXPRESS WAY FOOD MART	FOLSOM	100850			45	LA0001	300	LA		A	
-	GAS-N-SHOP #6	ABITA SPRINGS	100855	100		45	LA0001	210	LA		A	
-	JR FOOD MART - ABITA	ABITA SPRINGS	100900	100		20	LA0001	210	LA		A	
-	JR FOOD MART - FOLSOM	FOLSOM	100857			20	LA0001	300	LA		A	
-	KINGS FOREST EXXON	COVINGTON	800333	200		45	LA0001	400	LA		A	
-	KINGS GROCERY	BILOXI	320033			30	MS0001	200	MS		A	+
F3=Exit F4=Search F7=Search By Owner F16=Extended Restrictors												

4. After locating the desired customer in screen's list, enter *C* (Copy) in the selection column next to the customer's name.

DISPLAY HWJ7DFR		JEANNINE		CDR Customer Conference		7/19/21 17:46:47 QPADEV0016					
Work With Customers											
Customer Name/Number	City	Zip	BMatrix	RMatrix	SlsRep	Type	Route	ST	SlsGrp	Sts	Whs
LIL										A	
2=Edit Customer 3=EDI Options 5=Edit Options C=Copy N=Notes S=Score											
? Name	City	Cust #	BMatrix	RMatrix	SlsRep	TaxJur	PrmRte	ST	SlsGrp	Sts	
C LIL SHORT STOP - OCEAN SPRINGS	OCEAN SPRINGS	320092			30	MS0001	200	MS		A	
- LIL SHORT STOP - VANCLEVE	VANCLEVE	320091			30	MS0001	200	MS		A	
- MISS STOP N GO #110	BRANCH	380110			45	MS0001	500	MS		A	
- MISS STOP N GO #120	JACKSON	380120			45	MS0001	500	MS		A	
- MISS STOP N GO #130	NORTH BRANCH	380130			45	MS0001	500	MS		A	
- MISSISSIPPI STOP N GO	RIVER CITY	380100			20	MS0001	500	MS		A	
- OCEAN SPRINGS QUICK STOP	OCEAN SPRINGS	320055			30	MS0001	200	MS		A	
- PACKS FOOD STORE	HOUSTON	770060			27	TX0001	120	TX		A	
- PARK IT MARKET	HOUSTON	770005			10	TX0001	120	TX		A	
- SAIA'S SUPERMARKET	FOLSOM	300133			20	LA0001	300	LA		A	
- SNYDER'S STOP & GO	MANDEVILLE	100004			10	LA0001	100	LA		A	
- STOP 'N SHOP	COVINGTON	100001			10	LA0001	100	LA		A	
- TAYLOR'S MINI MART	HOUSTON	770031			20	TX0001	120	TX		A	
- TEXAS TRUCK STOP	HOUSTON	770001			27	TX0001	120	TX		A	
- THREE RIVERS CHEVRON	MANDEVILLE	100301			10	LA0001	100	LA		A	
- TODD'S COUNTRY CORNER	COVINGTON	100222			10	LA0001	100	LA		A	+

F3=Exit F4=Search F7=Search By Owner F16=Extended Restrictors

5. Press <Enter>. The Prompt For Customer Copy screen appears.

```

GSUDPVR  ENTER  CDR Customer Conference          9/13/11  9:17:20
                                Prompt For Customer Copy

Type choices, press Enter.

From Customer: 100855  GAS-N-SHOP #6
From Corporate: 100855  GAS-N-SHOP #6

To Customer: _____

NOTE: Leave customer number blank to have the system auto assign.

F3=Exit

```

6. Optional: Enter a number of six or fewer digits for **To Customer** (6,n), and press <Field Exit> to define the customer number for the new customer's record. The *Customer Master already exists* message appears if a previously used number is entered. Users have the option of leaving **To Customer** blank, and DAC will automatically assign the first unused number.

7. Press <Enter>.

8. Press <Enter> when prompted to confirm. The Edit Customer Page 1 screen appears. The fields of the new customer record may be changed. Refer to Editing Customer Master File Records and Editing Customer Corporate Master File Records for additional information.

Adding Customer Notes

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.
3. Select option 2 (Work With Customers) from the Customer Related #1 screen. The Work With Customers screen appears.

```

DISPLAY HWJ7DFR   JEANNINE           CDR Customer Conference           7/19/21  17:40:33  QPADEV0016
                                Work With Customers

Customer Name/Number           City           Zip   BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
-----
? 2=Edit Customer 3=EDI Options 5=Edit Options C=Copy N=Notes S=Score
?  Name           City           Cust # BMatrix RMatrix SlsRep TaxJur PrmRte ST SlsGrp Sts
- ABC STORE           MANDEVILLE     500121                20   LA0001 410   LA   A
- B AND D FOOD STORE #230 HOUSTON        771230          200    10 20   TX0001 120   TX   A
- BARON EXPRESS #2 BP   MANDEVILLE     100801                20   LA0001 300   LA   A
- BIG JOHN'S QUICK STOP #1 COVINGTON      260501                20   LA0001 100   LA   A
- BIG JOHN'S QUICK STOP #2 COVINGTON      260502                20   LA0001 410   LA   A
- BIG P MINI MART      LONG BEACH     320001                20   MS0001 200   MS   A
- BOB'S SHELL          COVINGTON      100003                45   LA0001 100   LA   A
- CRANKY CORNER QUICK STOP FOLSOM         100802          200    20   LA0001 300   LA   A
- DANNY & CLYDE'S FOOD #20 COVINGTON      800237                20   LA0001 400   LA   A
- DIANNE'S GROCERY     COVINGTON      100002                20   LA0001 100   LA   A
- EXPRESS WAY FOOD MART FOLSOM         100850                45   LA0001 300   LA   A
- GAS-N-SHOP #6        ABITA SPRINGS 100855          100    45   LA0001 210   LA   A
- JR FOOD MART - ABITA ABITA SPRINGS 100900          100    20   LA0001 210   LA   A
- JR FOOD MART - FOLSOM FOLSOM         100857                20   LA0001 300   LA   A
- KINGS FOREST EXXON   COVINGTON      800333          200    45   LA0001 400   LA   A
- KINGS GROCERY        BILOXI         320033                30   MS0001 200   MS   A +

F3=Exit  F4=Search  F7=Search By Owner F16=Extended Restrictors
  
```

4. After locating the desired customer in screen's list, enter *N* (Notes) in the selection column next to the customer's name.

```

DISPLAY HWJ7DFR   JEANNINE           CDR Customer Conference           7/19/21  17:40:33  QPADEV0016
                                Work With Customers

Customer Name/Number           City           Zip   BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
-----
? 2=Edit Customer 3=EDI Options 5=Edit Options C=Copy N=Notes S=Score
?  Name           City           Cust # BMatrix RMatrix SlsRep TaxJur PrmRte ST SlsGrp Sts
- ABC STORE           MANDEVILLE     500121                20   LA0001 410   LA   A
- B AND D FOOD STORE #230 HOUSTON        771230          200    10 20   TX0001 120   TX   A
- BARON EXPRESS #2 BP   MANDEVILLE     100801                20   LA0001 300   LA   A
- BIG JOHN'S QUICK STOP #1 COVINGTON      260501                20   LA0001 100   LA   A
- BIG JOHN'S QUICK STOP #2 COVINGTON      260502                20   LA0001 410   LA   A
- BIG P MINI MART      LONG BEACH     320001                20   MS0001 200   MS   A
- BOB'S SHELL          COVINGTON      100003                45   LA0001 100   LA   A
- CRANKY CORNER QUICK STOP FOLSOM         100802          200    20   LA0001 300   LA   A
- DANNY & CLYDE'S FOOD #20 COVINGTON      800237                20   LA0001 400   LA   A
N DIANNE'S GROCERY     COVINGTON      100002                20   LA0001 100   LA   A
- EXPRESS WAY FOOD MART FOLSOM         100850                45   LA0001 300   LA   A
- GAS-N-SHOP #6        ABITA SPRINGS 100855          100    45   LA0001 210   LA   A
- JR FOOD MART - ABITA ABITA SPRINGS 100900          100    20   LA0001 210   LA   A
- JR FOOD MART - FOLSOM FOLSOM         100857                20   LA0001 300   LA   A
- KINGS FOREST EXXON   COVINGTON      800333          200    45   LA0001 400   LA   A
- KINGS GROCERY        BILOXI         320033                30   MS0001 200   MS   A +

F3=Exit  F4=Search  F7=Search By Owner F16=Extended Restrictors
  
```

5. Press <Enter>. The Edit Customer Narrative screen appears.

Working With Customer Options

The Work With Customer Options application is used to designate customer options, such as the remote ordering charge, minimum order charge exemption, salesman commission exemption, and alternate pricing after customer records are created.

Refer to Working With Customer Pick Options and Working With Customer Invoice Options of the Billing File Maintenance document for information about designating customer options related to the pick process and invoice printing, respectively.

Refer to Working With Tote Charges of the Billing document for information about exempting specific customers from tote charges.

The instructions below describe using the Work With Customer Options application to add a customer's options record after the customer's record is added.

```

User: JEANNINE           Menu: CRM1CV1           Date: 7/20/21

===== > C U S T O M E R   R E L A T E D #1 <=====
|||||||
THE  ||          1. Work With Corporates/Customers
DAC  ||          2. Work With Customers
SYSTEM ||        3. Work With Employees
|||||||          4. Job Title Definitions
                    5. Corporate Level Definitions
                    6. Account Type Definitions
                    7. Terms Definitions
                    8. Demographic Areas
                    9. Route Master Definitions

M E N U   C A L L S
19. Customer Related #2  20. Tax System           21. Customer Reports
22. File Maintenance    23. Dac Main Menu          90. Sign Off

=====
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====>
  
```

1. Select Option 2 (Work With Customers) from the Customer Related #1 screen. The Work With Customers screen appears.

Customer Name/Number	City	Zip	BMatrix	RMatrix	SlsRep	Type	Route	ST	SlsGrp	Sts	Whs
2=Edit Customer 3=EDI Options 5=Edit Options C=Copy N=Notes S=Score											
? Name	City	Cust #	BMatrix	RMatrix	SlsRep	TaxJur	PrmRte	ST	SlsGrp	Sts	
- ABC STORE	MANDEVILLE	500121			20	LA0001	410	LA		A	
- B AND D FOOD STORE #230	HOUSTON	771230	200	10	20	TX0001	120	TX		A	
- BARON EXPRESS #2 BP	MANDEVILLE	100801			20	LA0001	300	LA		A	
- BIG JOHN'S QUICK STOP #1	COVINGTON	260501			20	LA0001	100	LA		A	
- BIG JOHN'S QUICK STOP #2	COVINGTON	260502			20	LA0001	410	LA		A	
- BIG P MINI MART	LONG BEACH	320001			20	MS0001	200	MS		A	
- BOB'S SHELL	COVINGTON	100003			45	LA0001	100	LA		A	
- CRANKY CORNER QUICK STOP	FOLSOM	100802	200		20	LA0001	300	LA		A	
- DANNY & CLYDE'S FOOD #20	COVINGTON	800237			20	LA0001	400	LA		A	
- DIANNE'S GROCERY	COVINGTON	100002			20	LA0001	100	LA		A	
- EXPRESS WAY FOOD MART	FOLSOM	100850			45	LA0001	300	LA		A	
- GAS-N-SHOP #6	ABITA SPRINGS	100855	100		45	LA0001	210	LA		A	
- JR FOOD MART - ABITA	ABITA SPRINGS	100900	100		20	LA0001	210	LA		A	
- JR FOOD MART - FOLSOM	FOLSOM	100857			20	LA0001	300	LA		A	
- KINGS FOREST EXXON	COVINGTON	800333	200		45	LA0001	400	LA		A	
- KINGS GROCERY	BILOXI	320033			30	MS0001	200	MS		A	+

F3=Exit F4=Search F7=Search By Owner F16=Extended Restrictors

- After locating the desired customer in screen's list, enter 5 (Edit Options) in the selection column next to the customer's name.

```

DISPLAY HWJ7DFR   JEANNINE           CDR Customer Conference           7/20/21 15:17:43 QPADEV0017
                                Work With Customers

Customer Name/Number           City                               Zip   BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
-----
2=Edit Customer 3=EDI Options 5=Edit Options C=Copy N=Notes S=Score
?   Name                       City                                Cust # BMatrix RMatrix SlsRep TaxJur PrmRte ST SlsGrp Sts
-   ABC STORE                   MANDEVILLE                          500121                20   LA0001 410   LA   A
-   B AND D FOOD STORE #230     HOUSTON                              771230           200   10 20   TX0001 120   TX   A
-   BARON EXPRESS #2 BP        MANDEVILLE                          100801                20   LA0001 300   LA   A
-   BIG JOHN'S QUICK STOP #1   COVINGTON                           260501                20   LA0001 100   LA   A
-   BIG JOHN'S QUICK STOP #2   COVINGTON                           260502                20   LA0001 410   LA   A
-   BIG P MINI MART            LONG BEACH                          320001                20   MS0001 200   MS   A
-   BOB'S SHELL                COVINGTON                           100003                45   LA0001 100   LA   A
-   CRANKY CORNER QUICK STOP   FOLSOM                              100802           200   20   LA0001 300   LA   A
-   DANNY & CLYDE'S FOOD #20   COVINGTON                           800237                20   LA0001 400   LA   A
-   DIANNE'S GROCERY           COVINGTON                           100002                20   LA0001 100   LA   A
5   EXPRESS WAY FOOD MART     FOLSOM                              100850                45   LA0001 300   LA   A
-   GAS-N-SHOP #6              ABITA SPRINGS                      100855           100   45   LA0001 210   LA   A
-   JR FOOD MART - ABITA       ABITA SPRINGS                      100900           100   20   LA0001 210   LA   A
-   JR FOOD MART - FOLSOM     FOLSOM                              100857                20   LA0001 300   LA   A
-   KINGS FOREST EXXON        COVINGTON                           800333           200   45   LA0001 400   LA   A
-   KINGS GROCERY             BILOXI                              320033                30   MS0001 200   MS   A +

F3=Exit F4=Search F7=Search By Owner F16=Extended Restrictors

```

- Press <Enter>. The Edit Customer Options Page 1 screen appears.

```

DSTPE2R   CHANGE   CDR Customer Conference           7/20/21 15:26:39
                                Edit Customer Options Page 1

Customer Number . . . : 100850 EXPRESS WAY FOOD MART

Remote Device Fee Charged?           User Status Flag 1 . . -
Charge Remote Device Fee             User Status Flag 2 . . -
Min. Order Charge Exclusion           Warehouse Label Ovrd. -
Commission Exemption . . .           Alternate Price Code -
Buy Eaches Override . . .           Pos Customer? (Y/N) . N
Pick Slip Message No.                Invoice Msg. No.
Exclude From Order Hold?             Exclude from Pre-Stamp N
Exclude From Item MOQ? . N

Omit Rebate?      ( *YES)           Excl/Dup Tax Right Label? _

Print Only Current & Past Due
Totals On Statement?      ( *YES)
Pricing Alias . . .

Pricebook Exclusion Override? N (Y/N)

F3=Exit F4=Search F11=Delete F12=Key screen

```

- Enter data for the following fields as necessary:
 - Remote Device Fee Charged?** (1,a) - this display field remains blank until Y is entered by the system when a remote order is transmitted for the customer. The Y value is cleared during end of week processing.
 - Charge Remote Device Fee** (1,a) - Y designates that the customer is charged a weekly remote device fee. Refer to Working With Remote Orders of the Billing document for additional information.
 - Min. Order Charge Exclusion** (1,a) - Y designates that the customer is exempt from minimum order charges. Exceptions can be made for specific orders by entering Y for the **Exempt M.O.C.?** field of the Change Order Information screen when entering a customer's order. Refer to Working With Minimum Order Charges of the Billing File Maintenance document for additional information.

- **Commission Exemption (1,a)** - *Y* designates that commissions are not calculated for orders from the customer. Refer to Working With Commissions of the Billing File Maintenance document for additional information.
- **Buy Eaches Override (1,a)** - *Y* designates that the customer is allowed to order an item at a selling level, usually eaches, specified as conditional in the item's record. Refer to Working With Items of the Item File Maintenance document for information about the **Sell1 - Sell4** fields of item records.
- **Pick Slip Message No. (1,n)** - the value entered designates a pick message for printing at the top of the customer's pick lists. Refer to Defining Form Messages of the Billing File Maintenance document for information about the **Message Number** field, and using the *PIC* application code for the **App code** field of form messages.
- **Exclude From Order Hold? (1,a)** - *Y* designates that the printing of pick lists (or other pick documents) and invoices is not be prohibited for the customer when *Y* is entered for the **Hold Orders For Over Credit Limit?** field or the **Hold Orders If Past Due?** field of the SYS036 default system option. Refer to DAC Default System Options document for additional information.
- **Exclude From Item MOQ? (1,a)** - *Y* designates that the customer can order less than the minimum order quantity specified in item records. Refer to Adding Items Records of the Item File Maintenance document for information about the **MOQ1 - MOQ4** fields.
- **Omit Rebate? (4,a)** - **YES* designates that the customer is excluded from receiving rebates. Refer to Working With Rebates of the Billing File Maintenance document for additional information.
- **Print Only Current & Past Due Totals On Statement? (4,a)** - **YES* designates that only current and past due invoice totals are printed on statements. If **NO* is entered, all invoice totals are printed.
- Optional: **Pricing Alias (6,n)** - this field is not used by DAC directly.
- Optional: **User Status Flag 1 (1,a)** - this field is not used by DAC directly.
- Optional: **User Status Flag 2 (1,a)** - this field is not used by DAC directly.
- **Warehouse Label Ovrld. (1,a)** - this field is no longer used by DAC due to system upgrades.
- **Alternate Price Code (1,n)** - an alternate price code designating the alternate prices (list price, base cost or MSRP) used by the customer. Refer to Entering Alternate Prices of the Item File Maintenance document for additional information.

- **POS Customer?** (1,a) - this field is no longer used by DAC due to system upgrades.
- **Invoice Msg. No.** (6,n) - a message number designating a customer-specific message to be printed on invoices. Refer to Defining Form Messages of the Billing File Maintenance document for information about the **Message Number** field, and using the *CIM* application code for the **App code** field of form messages.

5. Press <Enter> when data entry is complete.

```

DSTPE2R  CHANGE  CDR Customer Conference          7/20/21 15:26:39
                Edit Customer Options Page 1

Customer Number . . . : 100850 EXPRESS WAY FOOD MART

Remote Device Fee Charged?                User Status Flag 1 . _
Charge Remote Device Fee _                User Status Flag 2 . _
Min. Order Charge Exclusion _             Warehouse Label Ovr. _
Commission Exemption . . . _             Alternate Price Code _
Buy Eaches Override . . . _             Pos Customer? (Y/N) . N
Pick Slip Message No. _999              Invoice Msg. No. _____
Exclude From Order Hold? _              Exclude from Pre-Stamp N
Exclude From Item MOQ? . N

Omit Rebate? _____ (*YES)          Excl/Dup Tax Right Label? _

Print Only Current & Past Due
Totals On Statement? _____ (*YES)
Pricing Alias . . . _____

Pricebook Exclusion Override? N (Y/N)

F3=Exit  F4=Search  F11=Delete  F12=Key screen

```

6. Press <Enter> to confirm. The Edit Customer Options KEY SCREEN screen appears with the *Record changed* message.

```

DSTPE2R  CHANGE  CDR Customer Conference          7/20/21 15:41:01
                Edit Customer Options KEY SCREEN

Customer Number . 100850

F3=Exit  F4=Search  F9=Go to 'Add' mode
Record changed.

```

7. Press <F3> to exit. The Work With Customers screen appears.

#2 screen. The Work With Customer Collections screen appears with a list of customer collection records if any were previously defined.

```
CVM9DFR   DISPLAY CDR Customer Conference           1/24/14 12:43:30
                    Work with Customer Collections

Type options, press Enter.
2=Edit X=Select P=Print

? Collection Desc.                               Collection#
_ Pre-book Reports                               10

F3=Exit F5=Refresh F10=Create Collection
```

3. Press <F10> (Create Collection). The Edit Customer Collection screen appears.

```
DCNGDFR   DISPLAY CDR Customer Conference           1/24/14 12:45:57
                    Edit Customer Collection

Description: _____
Position: _____ Selection Count: 0
Add Customer: _____ Add Corporate: _____

Type options, press Enter.
D=Remove Selection P=Permanent

F3=Exit F4=Search F8=Remove ALL Customers F11=Delete Collection
```

4. Enter a description of the collection for the **Description** (50,a) field.

```
DCNGDFR   DISPLAY CDR Customer Conference           1/24/14 13:51:12
                    Edit Customer Collection

Description: Convenience Stores_____
Position: _____ Selection Count: 0
Add Customer: _____ Add Corporate: _____

Type options, press Enter.
D=Remove Selection P=Permanent

F3=Exit F4=Search F8=Remove ALL Customers F11=Delete Collection
```

5. To add a customer to the collection, enter data for one of the following fields, and press <Enter>:

- **Add Customer (6,n)** - a customer number. If necessary, press <F4> to select one or more numbers from the Select Customers screen.
- **Add Corporate (6,n)** - a corporate number. If necessary, press <F4> to select one or more numbers from the Select Corporate Master screen.

```

DCNGDFR  DISPLAY CDR Customer Conference           1/24/14 14:46:09
                Edit Customer Collection

Description: Convenience Stores_____
Position: _____ Selection Count:      5
Add Customer: _____ Add Corporate: _____

Type options, press Enter.
D=Remove Selection P=Permanent

? Cust #  Corp #  Cust/Corp Name                      Sts
- 260501          BIG JOHN'S QUICK STOP #1                A
- 260502          BIG JOHN'S QUICK STOP #2                A
- 900200          USA CONVENIENCE STORE #200              A
- 900300          USA CONVENIENCE STORE #300              A
- 900400          USA CONVENIENCE STORE #400              A
- 900500          USA CONVENIENCE STORE #500              A
- 900600          USA CONVENIENCE STORE #600              A

F3=Exit F4=Search F8=Remove ALL Customers F11=Delete Collection

```

6. If necessary, enter:

- *D* (Remove Selection) in the selection column next to the customer's number, and press <Enter> to delete a customer from the collection.
- *P* (Permanent) in the selection column next to the customer's number, and press <Enter> to prohibit users from inadvertently deleting a customer from the collection using <F8> (Remove ALL Customers).

```

DCNGDFR  DISPLAY CDR Customer Conference           1/24/14 15:37:30
                Edit Customer Collection

Description: Convenience Stores_____
Position: _____ Selection Count:      5
Add Customer: _____ Add Corporate: _____

Type options, press Enter.
D=Remove Selection P=Permanent

? Cust #  Corp #  Cust/Corp Name                      Sts
- 260501          BIG JOHN'S QUICK STOP #1                A
- 260502          BIG JOHN'S QUICK STOP #2                A
- 900200          USA CONVENIENCE STORE #200              PERMANENT A
- 900300          USA CONVENIENCE STORE #300              PERMANENT A
- 900400          USA CONVENIENCE STORE #400              PERMANENT A
- 900500          USA CONVENIENCE STORE #500              PERMANENT A
- 900600          USA CONVENIENCE STORE #600              PERMANENT A

F3=Exit F4=Search F8=Remove ALL Customers F11=Delete Collection

```

7. To remove all the customers, except those marked *PERMANENT*, from the collection, press <F8> (Remove ALL Customers), enter *Y* when the *Are you sure you want to remove all customers?* message appears, and press <Enter>.
8. To delete the entire collection, press <F11> (Delete Collection), enter *Y* when the *Are you sure you want to delete this collection?* message appears, and press <Enter>.
9. Press <F3> to exit. The Work With Customer Collections screen appears.

Working With Customer Delivery Messages

The Work With Customer Delivery Messages application can be used to define messages that are printed below the list of ordered items on the invoices of designated customers. Refer to *Defining Customer Delivery Messages of the Billing File Maintenance* document for additional information.

Working With Customer Reports

With one exception (noted below), the Customer Reports application (option 1 of the Reports screens) is used to print the following:

- Customer Corporate Master File Changes
- Customer Master File Changes
- Customer Address Labels - use option 3 (Customer Address Label) of the Label Menu screen.
- Customer Address List
- Corporate Address List
- Corporate Chain Address List
- Sales Call Route List
- Delivery Route List
- Customer List By Sales Representative
- Customer Credit Report.

The Special Customer Reports application (option 20 of the Customer Reports screen) is used to print the following reports:

- Customer Price/Retail List and Index (also called customer price book)
- Authorized Item List
- Velocity Report and Summary
- Customer Weekly Movement Report
- Future Price Changes
- Upcoming Price Changes
- Notify of Price Change (also called price change notifications)
- Invalid Route Codes List
- Office Staff Price List
- Customer Account Analysis - refer to the Sales Analysis Reports document for additional information.
- Monthly Cigarette Sales - refer to Working With End of Period of the DAC Closing Procedures document for additional information.

1. Select option 6 (Reports Menu) from the Main Operations Menu screen, or select 23 (Reports) from the File Maintenance screen. The Reports screen appears.

```

User: JEANNINE           Menu: RPCV1           Date: 5/08/06

===== > R E P O R T S < =====
=====
|||||||      1. Customer Reports
THE  ||      2. Item Reports
DAC  ||      3. A/R Reports
SYSTEM ||    4. Billing Reports
|||||||      5. Inventory Reports
|||         6. Purchasing Reports
|||         7. Tax Reports
|||         8. Sales Analysis Reports
|||         9. Labels
|||        10. Order Books

M E N U   C A L L S
19. Credit Reports      20. Salesman Reports      21.
22.                    23. Dac Main Menu        90. Sign Off

=====
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==>

```

2. Select 1 (Customer Reports) from the Reports screen. The Customer Reports screen appears.

```

User: JEANNINE           Menu: CURCV1          Date: 5/08/06

===== > C U S T O M E R   R E P O R T S < =====
=====
|||||||      1. Corporate Master Changes
THE  ||      2. Customer Master Changes
DAC  ||      3. Purge File Changes
SYSTEM ||    4. Customer Address Listing
|||||||      5. Corporate Address Listing
|||         6. Chain Address Listing
|||         7. Call Route(s) Listing
|||         8. Delivery Route(s) Listing
|||         9. Sales Rep. Customer Listing
|||        10. Customer Credit Report

M E N U   C A L L S
19. Customer Related #1 20. Special Cust. Reports 21. Reports
22. File Maintenance   23. Dac Main Menu        90. Sign Off

=====
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==>

```

3. Select option 20 (Special Cust Reports) from the Customer Reports screen. The Special Customer Reports screen appears.

```

User: JEANNINE           Menu: CUSPCV1         Date: 5/08/06

===== > S P E C I A L   C U S T O M E R   R E P O R T S < =====
=====
|||||||      1. Customer Price & Retail List
THE  ||      2. Authorized Item List
DAC  ||      3. Velocity Report
SYSTEM ||    4. Customer Weekly Report
|||||||      5. Price Change Notification
|||         6. Print Customers With Invalid Codes
|||         7. Office Staff Price List
|||         8. Print future price changes
|||         9. Print Account Analysis
|||        10. Monthly Cigarette Sales

M E N U   C A L L S
19.                    20. Customer Reports      21.
22.                    23. Dac Main Menu        90. Sign Off

=====
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==>

```

Printing A Customer Corporate Master File Changes Report

The Corporate Master Changes application prints a list of changes made to a Customer Corporate Master file record.

```
User: JEANNINE           Menu: CURCV1           Date: 5/08/06

===== > C U S T O M E R   R E P O R T S < =====
=====
|||||||
THE    ||           1. Corporate Master Changes
DAC    ||           2. Customer Master Changes
SYSTEM ||           3. Purge File Changes
|||||||           4. Customer Address Listing
|||||||           5. Corporate Address Listing
|||||||           6. Chain Address Listing
|||||||           7. Call Route(s) Listing
|||||||           8. Delivery Route(s) Listing
|||||||           9. Sales Rep. Customer Listing
|||||||          10. Customer Credit Report

                        M E N U   C A L L S
19. Customer Related #1 20. Special Cust. Reports 21. Reports
22. File Maintenance   23. Dac Main Menu       90. Sign Off

=====
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==>
```

1. Select option 1 (Corporate Master Changes) from the Customer Reports screen. The Print Corporate File Maintenance screen appears.

```
DSDUPVR  ENTER  Creative Data Research           5/08/06 13:45:00
                Print Corporate File Maintenance

                Corporate Number

                Beginning Date .   50806
                Ending Date  . .  50806

F3=Exit  F4=Search  F6=Print
```

2. Enter the desired corporate number for the **Corporate Number** (6,n) field, or press <F4> to select a number from the Select Corporate Master screen.
3. Enter a range of dates for the **Beginning Date** and **Ending Date** (6,n) fields to limit the changes which are included in the report according to the date the changes were made.
4. Press <F6> (Print).
5. Press <Enter> when prompted to confirm. The Customer Reports screen appears.

Refer to Purging File Changes for information about purging records if necessary to free disk space.

Customer Corporate Master File Changes

File Name--:	Key of Record	Key Description	Field Name	Before Change	After Change	Date of Change	User Id
	100035	ABC	Corporate Zip		74458	7/22/99	JTIPPIN
	100035	ABC	Corporate Zip		36420	7/22/99	JTIPPIN
	100035	ABC	Corporate Area Code	000		7/22/99	JTIPPIN
	100035	ABC	Corporate Area Code	000		7/22/99	JTIPPIN
	100035	ABC	Corporate Phone	00000000	8488514	7/22/99	JTIPPIN
	100035	ABC	Corporate Phone	00000000	8488514	7/22/99	JTIPPIN
	100035	ABC	Corporate Name		ABC	7/22/99	JTIPPIN
	100035	ABC	Corporate Name		ABC	7/22/99	JTIPPIN
	100035	ABC	Corporate Addr 1		P.O. BOX 46	7/22/99	JTIPPIN
	100035	ABC	Corporate Addr 1		P.O. BOX 46	7/22/99	JTIPPIN
	100035	ABC	Corporate Type		I	7/22/99	JTIPPIN
	100035	ABC	Corporate Type		I	7/22/99	JTIPPIN
	100035	ABC	Corporate City		IULING	7/22/99	JTIPPIN
	100035	ABC	Corporate City		IULING	7/22/99	JTIPPIN
	100035	ABC	Level Code		S	7/22/99	JTIPPIN
	100035	ABC	Level Code		S	7/22/99	JTIPPIN
	100035	ABC	Corporate State		LA	7/22/99	JTIPPIN
	100035	ABC	Corporate State		MS	7/22/99	JTIPPIN
	100035	ABC	Corporate Country Code		USA	7/22/99	JTIPPIN
	100035	ABC	Corporate Country Code		USA	7/22/99	JTIPPIN
	100035	ABC	Corporate Contact 1		JAMES SMITH	7/22/99	JTIPPIN
	100035	ABC	Corporate Contact 1		JAMES SMITH	7/22/99	JTIPPIN
	100035	ABC	Corporate Title 1		PARTNER	7/22/99	JTIPPIN
	100035	ABC	Corporate Title 1		PARTNER	7/22/99	JTIPPIN
	100035	ABC	Corporate Status		A	7/22/99	JTIPPIN
	100035	ABC	Corporate Status		A	7/22/99	JTIPPIN
	100035	ABC	Account Rep Sales Employee		01	7/22/99	JTIPPIN
	100035	ABC	Account Rep Sales Employee		01	7/22/99	JTIPPIN

** END OF REPORT **

Printing A Customer Master File Changes Report

The Customer Master Changes application prints a list of changes made to a Customer Master file record.

```
User: JEANNINE          Menu: CURCV1          Date: 5/08/06

===== > C U S T O M E R   R E P O R T S <=====
=====
|||||||
THE  ||          1. Corporate Master Changes
DAC  ||          2. Customer Master Changes
SYSTEM ||        3. Purge File Changes
|||||||          4. Customer Address Listing
|||||||          5. Corporate Address Listing
|||||||          6. Chain Address Listing
|||||||          7. Call Route(s) Listing
|||||||          8. Delivery Route(s) Listing
|||||||          9. Sales Rep. Customer Listing
|||||||         10. Customer Credit Report

                          M E N U   C A L L S
19. Customer Related #1 20. Special Cust. Reports 21. Reports
22. File Maintenance  23. Dac Main Menu          90. Sign Off
=====
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====>
```

1. Select option 2 (Customer Master Changes) from the Customer Reports screen. The Display Maintenance screen appears.
2. Press <F6> (Print Changes). The Print Customer Change screen appears.

```
DSDCPVR  ENTER  Creative Data Research          5/08/06 13:49:45
                          Print Customer Change

                          Customer Number

                          Beginning date .    50806
                          Ending date  . .    50806

F3=Exit  F4=Search  F6=Print
```

3. Enter the desired customer number for the **Customer Number** (6,n) field, or press <F4> to select a number from the Select Customer Master screen.
4. Enter a range of dates for the **Beginning Date** and **Ending Date** (6,n) fields to limit the changes which are included in the report according to the date the changes were made.
5. Press <F6> (Print).
6. Press <Enter> when prompted to confirm. The Customer Reports screen appears.

Refer to Purging File Changes for information about purging records if necessary to free disk space.

Customer Master File Changes

Creative Data Research-SUPPORT Print File Maintenance JTIPPIN DSCOPFR 8/15/99 17:38:50 Page 1

File Name:-

Key of Record	Key Description	Field Name	Before Change	After Change	Date of Change	User Id
100035	ABC	Customer City	ALBANIA	LULING	7/22/99	JTIPPIN
100035	ABC	Delivery Route 1	TABLE	201	7/08/99	JTIPPIN
100035	ABC	Delivery Route 2		201	7/09/99	JTIPPIN
100035	ABC	Delivery Route 3		201	7/08/99	JTIPPIN
100035	ABC	Delivery Route 4		201	7/09/99	JTIPPIN
100035	ABC	Delivery Route 5		201	7/09/99	JTIPPIN

** END OF REPORT **

Purging File Changes

The Purge File Changes application is used to purge records created to track changes made to Customer Master file and Customer Corporate Master file records. Purging is typically done to free disk space.

```
User: JEANNINE           Menu: CURCV1           Date: 5/08/06

===== > C U S T O M E R   R E P O R T S <=====
=====
|||||||
THE  ||          1. Corporate Master Changes
DAC  ||          2. Customer Master Changes
SYSTEM ||        3. Purge File Changes
|||||||          4. Customer Address Listing
||              5. Corporate Address Listing
||              6. Chain Address Listing
||              7. Call Route(s) Listing
||              8. Delivery Route(s) Listing
||              9. Sales Rep. Customer Listing
||             10. Customer Credit Report

                M E N U   C A L L S
19. Customer Related #1  20. Special Cust. Reports 21. Reports
22. File Maintenance    23. Dac Main Menu          90. Sign Off
=====
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====>
```

1. Select option 3 (Purge File Changes) from the Customer Reports screen. The Prompt For Purge Criteria screen appears.

```
DSCTPVR  ENTER  Creative Data Research           5/08/06 13:54:35
                          Prompt for Purge Criteria

                          File Name . . .
                          Beginning Date    50806
                          Ending Date . .  50806

F3=Exit  F4=Search
```

2. Press <F4> to select the desired file to purge.

```
DSEKSRR  SELECT  Creative Data Research           5/08/06 13:54:57
                          Select File Desc. Master
DDS File   DDS File Name Desc.
Name

Type options, press Enter.
X=Select request

? DDS File   DDS File Name Desc.
Name
DSABREP     Customer Master
DSACREP     Customer Corporate Master
DSANREP     Item Master
DSASREP     Item Balance Master
DSBAREP     Item Movement Master
DSB8REP     Customer Options

F3=Exit
```

3. Enter *X* (Select request) in the selection column next to the desired file's name, and press <Enter>. The Prompt For Purge Criteria screen appears with the desired file name entered for the **File Name** field.

```
DSCTPVR  ENTER  Creative Data Research  5/08/06 13:55:38
                          Prompt for Purge Criteria

File Name . . .  DSABREP      Customer Master
Beginning Date   50806
Ending Date . .  50806

F3=Exit  F4=Search
```

4. Enter dates for the **Beginning Date** and **Ending Date** fields to limit purging to change records created during a particular range of dates.
5. Press <Enter>.
6. Press <Enter> when prompted to confirm. The Customer Reports screen appears.

Printing Customer Address Labels

The Customer Address Label application is used to print addresses on labels of various sizes using a variety of criteria.

Laser printers can be used to print customer addresses on 3-up labels measuring 1” by 2-5/8” as follow:

- Format 5 - customer number, corporate number, billing matrix number, retail matrix number and customer collection number can be used for the criteria.
- Format 6 - employee number and customer collection number can be used for the criteria, and includes the option of printing the customer’s “bill to” address.

Tractor-fed dot matrix printers can be used to print addresses on 1-up labels measuring:

- 1” by 3-1/2” labels using format 2. Customer number, corporate number, billing matrix number, retail matrix number and customer collection number can be used for the criteria.
- 1” by 3-1/2” labels using format 4. In addition to the criteria used for format 2 listed above, users can print address labels for a range of customer numbers or range of states. They also have the option of printing the customer’s “bill to” or “ship to” address.
- 3” by 3-7/8” labels using format 1. Customer number, corporate number, billing matrix number, retail matrix number and customer collection number can be used for the criteria. An example of this format, which includes the distributor’s return address, is illustrated below.
- 1” by 5” labels using format 3. Employee number and customer collection number can be used for the criteria, and the customer’s “bill to” address can be printed if desired.

CDR WHOLESALE DISTRIBUTION 205 E LOCKWOOD STREET	
COVINGTON	LA 70433 2827
<hr/>	
USA CONVENIENCE STORE #300 25800 HWY 190	
COVINGTON	LA 70433

Refer to Working With Customers for additional information about “bill to” and “ship to” addresses.

```

User: JEANNINE          Menu: RPCV1          Date: 7/03/12

===== > R E P O R T S <=====
|||||||
THE  ||                1. Customer Reports
DAC  ||                2. Item Reports
SYSTEM ||            3. A/R Reports
|||||||                4. Billing Reports
|||                    5. Inventory Reports
|||                    6. Purchasing Reports
|||                    7. Tax Reports
|||                    8. Sales Analysis Reports
|||                    9. Labels
|||                   10. Order Books

M E N U   C A L L S
19. Credit Reports    20. Salesman Reports    21.
22.                  23. Dac Main Menu      90. Sign Off

=====
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==>

```

1. Select option 9 (Labels) from the Reports screen. The Label Menu screen appears.

```

User: JEANNINE          Menu: LBLCV1          Date: 7/03/12

===== > L A B E L   M E N U <=====
|||||||
THE  ||                1. Warehouse Bin Label
DAC  ||                2. Retail Shelf Label
SYSTEM ||            3. Customer Address Label
|||||||                4. Vendor Address Label
|||                    5. Work With Retail Label Batches
|||                    6. Work With Bin Label Batches

M E N U   C A L L S
19.                  20.                  21.
22.                  23. Dac Main Menu    90. Sign Off

=====
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==>

```

2. Select option 3 (Customer Address Label) from the Label Menu screen. The Customer Address Labels screen appears.

```

BSW2PVR  ENTER  CDR Customer Conference          7/03/12 12:27:34
                Customer Address Labels

                Selection      Criteria:

Customer Number . . . . . _____
** OR **
Customer Corporate Number . _____
** OR **
Billing Matrix Number . . . _____
** OR **
Retail Matrix Number . . . _____ Customer Collection _____
** OR **
Beginning State __ Ending State __ Ship or Bill Addr. (S/B) _ (Format 4 Only)

Return address to print?(Y/N) Y
Number of Copies . . . . . 1
Address Labl Format(1,2,3,4,5,6) 1
Label          Format #      Label          Format #
3" /\  X  3 7/8"-->      1      1" /\  X  3.5" -->      2
1" /\  X  5 /\          3      1" /\  X  3.5" -->      4
1" /\  X  2 5/8"(laser 3-up) 5      1" /\  X  2 5/8"(laser 3-up) 6
F3=Exit  F4=Search  F6=Print  F8=Customer Collections

```

3. If format 1, 2 or 5 is used, enter a value for one of the following fields to

designate the desired customers, and continue with step 8 or 9 as necessary.

- **Customer Number (6,n)** - a customer number to print a label for a single customer. If necessary, press <F4> to select a number from the Select Customer Master screen.
- **Customer Corporate Number (6,n)** - a customer corporate number to print a label for each customer of a corporate chain. If necessary, press <F4> to select a number from the Select Corporate Master screen.
- **Billing Matrix Number (6,n)** - a billing matrix number to print labels for all the customers of the designated billing matrix. If necessary, press <F4> to select a number from the Select Billing Matrix screen.
- **Retail Matrix Number (6,n)** - a retail matrix number to print labels for all the customers of the designated retail matrix. If necessary, press <F4> to select a number from the Select Retail Matrix screen.
- **Customer Collection (6,n)** - a customer collection number to print labels for all the customers of the designated collection. If necessary, press <F4> to select a number from the Work With Customer Collections screen.

```

BSW2PVR  ENTER  CDR Customer Conference  7/03/12 12:33:26
                Customer Address Labels

                Selection  Criteria:

                                Beginning Salesman  _____
                                Ending Salesman :    _____

                                Customer Collection  _____

                                Mailing List Code . . . :  Y

Address Labl Format(1,2,3,4,5,6) 3  Print Corporate Address Y/N _
Label          Format #          Label          Format #
3" /\  X  3 7/8"-->  1  1" /\  X  3.5" -->  2
1" /\  X  5 /\  3  1" /\  X  3.5" -->  4
1" /\  X  2 5/8"(laser 3-up) 5  1" /\  X  2 5/8"(laser 3-up) 6
F3=Exit  F4=Search  F6=Print  F8=Customer Collections

```

4. If format 3 is used, enter values for one or more of the following fields after entering 3 for the **Address Labl Format (1,a)** field as illustrated above:
 - **Beginning Salesman and Ending Salesman (6,a)** - a range of employee numbers to limit label printing to the customers of the designated sales representatives. If necessary, press <F4> to select a number from the Select Employee Master screen.
 - **Customer Collection (6,n)** - a customer collection number to limit label printing to the customers of the designated collection. If necessary, press <F4> to select a number from the Work With Customer Collections screen.
 - **Mailing List Only (1,a)** field - enter Y (yes) to limit label printing to the customer records which have Y entered for the **Frequent Mailing List** field. Refer to Adding Customer Records for additional information.
 - **Print Corporate Address Y/N (1,a)** field - enter Y (yes) to print the customer's "bill to" address on the labels.

Note: If all of the above fields are blank, labels are printed for every customer.

5. If format 4 is used, enter values for one of the following fields after entering 4 for the **Address Labl Format (1,a)** field:

- **Customer Number and To** (6,n) - a range of customer numbers to print labels for a group of customers. If necessary, press <F4> to select a number from the Select Customer Master screen.
 - **Customer Corporate Number** (6,n) - a customer corporate number to print a label for each customer of a corporate chain. If necessary, press <F4> to select a number from the Select Corporate Master screen.
 - **Billing Matrix Number** (6,n) - a billing matrix number to print labels for all the customers of the designated billing matrix. If necessary, press <F4> to select a number from the Select Billing Matrix screen.
 - **Retail Matrix Number** (6,n) - a retail matrix number to print labels for all the customers of the designated retail matrix. If necessary, press <F4> to select a number from the Select Retail Matrix screen.
 - **Customer Collection** (6,n) - a customer collection number to print labels for all the customers of the designated collection. If necessary, press <F4> to select a number from the Work With Customer Collections screen.
6. If format 4 is used, enter values for the following fields as necessary:
- **Beginning State and Ending State** (2,a) - enter a range of state abbreviations to limit label printing to the customers of the designated state.
 - **Ship or Bill Addr. (S/B)** (1,a) field - enter *S* or *B* to print the customer's "ship to" address or "bill to" address, respectively, on the labels.
 - **Number of Copies** (2,n) - enter any number between 1 and 99 to designate how many labels are printed.
7. If format 6 is used, enter values for one or more of the following fields after entering 6 for the **Address Labl Format** (1,a) field:
- **Beginning Salesman and Ending Salesman** (6,a) - a range of employee numbers to limit label printing to the customers of the designated sales representatives. If necessary, press <F4> to select a number from the Select Employee Master screen.
 - **Customer Collection** (6,n) - a customer collection number to limit label printing to the customers of the designated collection. If necessary, press <F4> to select a number from the Work With Customer Collections screen.
 - **Print Corporate Address Y/N** (1,a) field - enter *Y* (yes) to print the customer's "bill to" address on the labels.
8. If format 1 is used, enter values for the following fields:
- **Return Address To Print?** (1,a) - enter *Y* (yes) to print the distributor's return address on the labels.
 - **Number of Copies** (2,n) - enter any number between 1 and 99 to designate how many labels are printed.
 - **Address Labl Format** (1,a) - enter 1.
9. If format 2 or 5 is used, enter values for the following fields:
- **Number of Copies** (2,n) - enter any number between 1 and 99 to designate how many labels are printed.

- **Address Labl Format (1,a)** - enter 2 or 5.

10. Press <F6> when data entry is complete, and press <Enter> when prompted to confirm. The Label Menu screen appears.

Printing A Customer Address List

The Customer Address Listing application is used to print a list of customers assigned to a marketing director, marketing manager, marketing representative, or any combination of the three.

```
User: JEANNINE           Menu: CURCV1           Date: 5/08/06

===== > C U S T O M E R   R E P O R T S <=====
=====
|||||
THE  ||      1. Corporate Master Changes
DAC  ||      2. Customer Master Changes
SYSTEM ||    3. Purge File Changes
|||||      4. Customer Address Listing
|||||      5. Corporate Address Listing
|||||      6. Chain Address Listing
|||||      7. Call Route(s) Listing
|||||      8. Delivery Route(s) Listing
|||||      9. Sales Rep. Customer Listing
|||||     10. Customer Credit Report

                M E N U   C A L L S
19. Customer Related #1 20. Special Cust. Reports 21. Reports
22. File Maintenance   23. Dac Main Menu       90. Sign Off
=====
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===>
```

1. Select option 4 (Customer Address Listing) from the Customer Reports screen. The Display Customers For Print screen appears.

```
DSE9DFR  DISPLAY Creative Data Research-SUPPORT      8/17/99 17:34:37
          Display Customers For Print
Marketing Dir   Marketing Mgr   Marketing Rep

Type options, press Enter.

? Marketing  Marketing  Marketing  Customer Name
  Director  Manager  Representative
100         100        01        AAMCO STATION 1
100         100        01        ABC
100         100        01        ABC EMPLOYEES PURCHASES
100         100        01        ABC SOUVENIRS
100         100        06        ADKINSON GENERAL STORE
100         100        04        AIRLINE ROAD TEXACO
100         100        01        ALABAMA BONE & JOINT CLINIC
100         100        03        ALABAMA SUPERSTORE
100         100        01        ALBERTSON CASH & CARRY (NO TAX)
100         100        01        ALL HITS VIDEO STORE
100         100        01        AMERICAN CHRONICLE      +

F3=Exit  F6=Print
```

2. If necessary, enter the employee code of the desired marketing director for the **Marketing Dir** (6,a) field.
3. If necessary, enter the employee code of the desired marketing manager for the **Marketing Mgr** (6,a) field.
4. If necessary, enter the employee code of the desired sales representative for the **Marketing Rep** (6,a) field.
5. Press <F6> (Print).
6. Press <F3> to exit. The Customer Reports screen appears.

Customer Address List

Creative Data Research-SUPPORT			Customer Address List		JTIPPIN	DSFGPFR	8/15/99 18:12:54	Page	1
Customer Number	Corp. Number	Marketing Rep.	Customer Name Address 3	Address 1 City	Address 2 State, Zip, Telephone				Sts
104740	104740	26	B & W ROUTE MART	LOIS LANE POPLARVILLE	MS 35611		205 - 2335511		A
106180	106180	26	BETHSTON MART	7590 AVE I BETHSTON	MS 35620		256 - 4236307		A
111030	111030	26	BUSY SHOP	214 MAIN STREET COLUMBIA	MS 35601		205 - 7879212		A
111200	111200	26	BUTTARD MART	564 HWY 90 TUPELO	MS 35750		205 - 8687145		A
119530	119530	26	C & A FOOD MART	1278 ELM STREET LUBBOCK	TX 35613		256 - 8995632		A
151252	151252	26	CHARITY HOSPITAL	1111 HEARTY DRIVE TUPELO	MS 35750		205 - 8847958		A
100935	100935	26	CORNER STOP	432 HWY. 23 BURAS	LA 35601		312 - 987654		A
101022	101022	26	COVE SERVICE STATION	787 HWY 90 THIBODEAUX	LA 35650		654 - 7896541		A
120020	120020	26	DAILY TEXACO	P.O. BOX 3254 FRANKLINTON	LA 35739		654 - 9328711		A
100407	100407	26	DANIEL'S GROCERY	P.O. BOX 7890 ABITA SPRINGS	LA 35749		987 - 3254169		A
125080	125080	26	ELKINSON FOODS	7676 SOUTH LIVINGSTON STREET FORT WORTH	TX 35620		632 - 2200147		A
167230	167230	26	ELVON TEXACO	2344 GEORGE STREET HOUSTON	TX 35620		554 - 2158991		A
126140	126140	26	FAMILY TREASURES	232 EAST ABRAHAM STREET LIVINGSTON	TX 35888		331 - 1175214		A
128609	128609	26	FREE STYLE SHOP	2345 ADAM ROAD KENNER	LA 35653		755 - 8974561		A
133337	133337	26	HANDY MART	17369 MCMILLAN RD HATTIESBURG	MS 35630		22 - 3698521		A
138760	138760	26	HWY ROAD SERVICE	345 SOUTH HWY 23 BURAS	LA 35577		322 - 5889001		A
153137	153137	26	J & G ENTERPRISES	8103 NOTTINGHAM DRIVE WAVELAND	MS 35773		321 - 6114874		A
139605	139605	26	J K'S HARDWARE	3409 RICHMOND STREET NATCHEZ	MS 35603		366 - 2558963		A
139900	139900	26	JACKIE'S SUPPLY CO.	344 JACKSON STREET ABITA SPRINGS	LA 35620		211 - 6554789		A
153153	153153	26	JIFFY MART	890 WEST 7TH STREET HOUMA	LA 35611		322 - 9658744		A
153149	153149	26	JIFFY TOP MART	2301 SOUTH HWY 32 FOLSOM	LA 35611		699 - 3559852		A
144099	144099	26	JOE'S TOBACCO	623 21ST STREET METAIRIE	LA 35601		311 - 5559874		A
101780	101780	26	JOHNNY'S EXXON	3245 SOUTH DERBIGNY BURAS	LA 35805		655 - 9870203		A
101730	101730	26	JOHNSTON'S QUICK SHOP	7890 EAST KEY STREET SAN ANTONIO	TX 35650		255 - 9635698		A
143975	143975	26	JORDAN LAKE ENTERPRISES	4334 NORTH LAKE DRIVE HATTIESBURG	MS 35816		655 - 9633698		A
100055	100055	26	KELLY GREEN FABRICS	P.O. BOX 43210 WIGGINS	MS 87541		601 - 6332201		A
** END OF REPORT **									

Printing A Corporate Address List

The Corporate Address Listing application is used to print a list of corporate customers assigned to an accounts receivable representative, an account sales representative, or both.

```
User: JEANNINE          Menu: CURCV1          Date: 5/08/06

===== > C U S T O M E R   R E P O R T S <=====
=====
|||||||
THE    ||          1. Corporate Master Changes
DAC    ||          2. Customer Master Changes
SYSTEM ||          3. Purge File Changes
|||||||          4. Customer Address Listing
|||||||          5. Corporate Address Listing
|||          6. Chain Address Listing
||          7. Call Route(s) Listing
||          8. Delivery Route(s) Listing
||          9. Sales Rep. Customer Listing
||         10. Customer Credit Report

M E N U   C A L L S
19. Customer Related #1  20. Special Cust. Reports  21. Reports
22. File Maintenance    23. Dac Main Menu          90. Sign Off

=====
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===>
```

1. Select option 5 (Corporate Address Listing) from the Customer Reports screen. The Display Corps For Print screen appears.

```
DSFLDFR  DISPLAY Creative Data Research-SUPPORT      8/17/99 17:53:02
          Display Corps. For Print

A/R      Account
Rep.     Rep.

Type options, press Enter.

? A/R      Account  Corporate Name
Rep.     Rep.
        01         ABC
        01         ABC SOUVENIRS
        06         ADKINS GENERAL STORE
        04         AIRPORT ROAD CHEVRON
                ALABAMA ASTHMA & ALLERGY CLINIC
        03         ALABAMA SUPERMARKET
        01         ALBERTSON & SON
        01         ALBERTSON CASH & CARRY
        01         ALBERTSON EMPLOYEES
        01         ALL RATING VIDEO & MINI MART          +

F3=Exit  F6=Print
```

2. If necessary, enter the employee code of the desired accounts receivable representative for the **A/R Rep** (6,a) field.
3. If necessary, enter the employee code of the desired account sales representative for the **Account Rep** (6,a) field.
4. Press <F6> (Print).
5. Press <F3> to exit. The Customer Reports screen appears.

Corporate Address Listing

Creative Data Research			Corporate Address Listing		KAREN	DSFKPFR	11/16/92 10:38:55	Page	1
Corp. Number	A/R Rep.	Sales Rep.	Corporate Name Address 3	Address 1 City	Address 2 State, Zip, Telephone			Sts	
200229	44444	10	CDR CONVENIENCE	1150 LOVER'S LANE MANDEVILLE	P.O. BOX 8989 LA 70448 - 504 - 6268408			A	
200232	200002	10	SUPER SPECIAL STORES	777 WISHFUL THINKING DRIVE BATON ROUGE	LA 70808 - 504 - 9287637			A	
200233	200002	10	SUPER SPECIAL STORES MAIN OFFICE	1000 MAIN STREET NEW ORLEANS	CORNER OF MAIN & ELM LA 70145 - 504 - 5259090			A	
200217	200002	10	THE VERY BEST CORP	123 HERE MADISONVILLE	LA 70448 - 1230 504 - 8453333			A	
** END OF REPORT **									

Printing A Corporate Chain Address List

The Chain Address Listing application is used to print a list of chain customers.

```
User: JEANNINE           Menu: CURCV1           Date: 5/08/06

===== > C U S T O M E R   R E P O R T S <=====
=====
|||||||
THE  ||      1. Corporate Master Changes
DAC  ||      2. Customer Master Changes
SYSTEM ||    3. Purge File Changes
|||||||      4. Customer Address Listing
|||||||      5. Corporate Address Listing
|||||||      6. Chain Address Listing
|||||||      7. Call Route(s) Listing
|||||||      8. Delivery Route(s) Listing
|||||||      9. Sales Rep. Customer Listing
|||||||     10. Customer Credit Report

                M E N U   C A L L S
19. Customer Related #1 20. Special Cust. Reports 21. Reports
22. File Maintenance  23. Dac Main Menu          90. Sign Off
=====
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===>
```

1. Select option 6 (Chain Address Listing) from the Customer Reports screen. The Display Chains For Print screen appears.

```
DSFQDFR  DISPLAY Creative Data Research           5/08/06 15:28:37
                Display Chains For Print
Corporate Name           Account  A/R
                        Rep.      Rep.

Type options, press Enter.
7=Print

? Corporate Name           Account  A/R      Corp
                        Rep.      Rep.      Type
AMERICA'S STORES CORP.   KIM      C        C
FASTX DRUGS INC          JULIE    C        C
GIBSON HEADQUARTERS      KIM      C        C
INTERSTATE CONVENIENCE STORE, INC. BILLY    C        C

F3=Exit
```

2. Enter 7 (Print) in the selection column next to the desired corporate customer.
3. Press <Enter> to print.
4. Press <F3> to exit. The Customer Reports screen appears.

Corporate Chain Address List

Creative Data Research-SUPPORT			Corp Chain Addr. Listing		JTIPPIN	DSFVPER	8/15/99 18:37:16 Page		1
Corp. Number	A/R Rep.	Sales Rep.	Corporate Name Address 3	Address 1 City	Address 2 State, Zip, Telephone				Sts
300800	504	02	SEASIDE FOOD MARKETS	HUNTSVILLE	P.O. BOX 233 AL 35801 -		205 - 5391362		A
Customer Name	Customer City	State	Zip	Code	Salesman Number	Cust. Number	Phone	Number	
PANTRY NOTIONS NO. 1	POPLARVILLE	MS	74125	-	02	181130	225	- 6554110	
PANTRY NOTIONS NO. 2	TUPELO	MS	85522	-	02	181131	933	- 4557801	
PANTRY NOTIONS NO. 3	WIGGINS	MS	88369	-	02	181140	996	- 4112580	
PANTRY NOTIONS NO. 4	CROSS ROADS	MS	74558	-	02	181141	445	- 5556332	
SHELBURG DISTRIBUTORS	MANDEVILLE	LA	70458	-	02	181011	504	- 9887441	
SHELL CREEK HIGH SCHOOL	WIGGINS	MS	74896	-	02	173530	601	- 6554477	
SHELL CREEK PRIMARY	POPLARVILLE	MS	54789	-	02	173525	601	- 7789965	
SHELL CREEK SECONDARY	TUPELO	MS	78965	-	02	173521	601	- 8445898	
SHELL CREEK WHOLESALE	JACKSON	MS	65877	-	02	172801	604	- 4458745	
SHELTERS GROCER	MERIDIAN	MS	65891	-	02	172800	601	- 5552236	
SHELTON ENTERPRISES	COVINGTON	LA	45878	-	02	181010	504	- 8396655	
** END OF REPORT **									

Printing A Sales Call Route List

The Call Routes Listing application is used to print a list of sales call routes.

```
User: JEANNINE          Menu: CURCV1          Date: 5/08/06

===== > C U S T O M E R   R E P O R T S < =====
=====
|||||||
THE  ||      1. Corporate Master Changes
DAC  ||      2. Customer Master Changes
SYSTEM ||    3. Purge File Changes
|||||||      4. Customer Address Listing
|||         5. Corporate Address Listing
|||         6. Chain Address Listing
|||         7. Call Route(s) Listing
|||         8. Delivery Route(s) Listing
|||         9. Sales Rep. Customer Listing
|||        10. Customer Credit Report

M E N U   C A L L S
19. Customer Related #1  20. Special Cust. Reports  21. Reports
22. File Maintenance    23. Dac Main Menu      90. Sign Off

=====
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===>
```

1. Select option 7 (Call Routes Listing) from the Customer Reports screen. The Prompt For Route Listing screen appears.

```
DSWMPVR  ENTER  Creative Data Research-SUPPORT      8/17/99 16:47:09
Prompt For Route Listing

Put A "Y" Beside Each Day That You Want A Route List For.

Monday .          *** Call Routes ***
Tuesday
Wednesday
Thursday
Friday .
Saturday
Sunday .

Salesman Number   (Blank for All)

Report Version    ( 1 or 2 )

F3=Exit  F6=Print
```

2. Enter *Y* in the selection column next to the desired call route days.
3. If necessary, enter the employee code of a sales representative for the **Salesman Number** (6,a) field.
4. Enter *1* or *2* for the **Report Version** (1,n) field to designate the desired report version (see examples below).
5. Press <F6> (Print).
6. Press <Enter> when prompted to confirm.

Sales Call Route List (Report Version 1)

Customer #	Customer Name	Address Line 1	City/State	Zip	Area/Phone	Seq#
Route 702	SISMN 02 TUESDAY	Salesman: JAMES PATTON				
180830	SHELL STATION NO. 8	P. O. BOX 788	LUBBOCK	TX 7896	908 6993699	10
180831	SHELL STATION NO. 9	5490 HWY 23 WEST	HOUSTON	TX 78965	809 9632589	10
180970	PANTRY NEEDS NO. 2	455 HWY. 22	AUSTIN	TX 74102	966 3998741	20
180971	PANTRY NEEDS NO. 3	3344 HWY 44	LUBBOCK	TX 74558	822 7442233	20
180950	PANTRON QUICK STOP	5556 BRIDE STREET	HATTIESBURG	MS 74122	855 7448547	30
180951	PANTRY NEEDS NO. 1	2233 HWY. 12	WAVELAND	MS 12369	811 5554788	30
173300	SHELL STATION NO. 20	6611 JACKSON STREET	BOGALUSA	LA 74589	504 6889874	40
173301	SHELL STATION NO. 21	222 WEST MINSTRAL STREET	MERIDIAN	MS 78965	601 5698745	40
173000	SHELL STATION NO. 15	8745 TEXAS DRIVE	KENNER	LA 78965	504 7441212	50
173001	SHELL STATION NO. 16	5400 WASHINGTON STREET	NEW ORLEANS	LA 70458	504 8996688	50
180821	SHELL STATION NO. 7	9900 HWY 81 WEST	AUSTIN LLE	TX 74158	801 8745896	60
180825	SHELL STATION NO. 6	5533 ROSE STREET	NATCHEZ	MS 89654	601 6654785	60

** END OF REPORT **

Sales Call Route List (Report Version 2)

Customer #	Customer Name	Address Line 1	City/State	Zip	Area/Phone	Seq.	Route	Matrix	License 1
Route 702	SISMN 02 TUESDAY	Salesman: JAMES PATTON							
18083002	SHELL STATION NO. 8	P. O. BOX 788	LUBBOCK	TX 47896	908 6993699	10	702	10500	10
18083101	SHELL STATION NO. 9	5490 HWY 23 WEST	HOUSTON	TX 78965	809 9632589	10	702	10500	10
18097009	PANTRY NEEDS NO. 2	455 HWY. 22	AUSTIN	TX 74102	966 3998741	20	702	10500	20
18097108	PANTRY NEEDS NO. 3	3344 HWY 44	LUBBOCK	TX 74558	822 7442233	20	702	10500	20
18095005	PANTRON QUICK STOP	5556 BRIDE STREET	HATTIESBURG	MS 74122	855 7448547	30	702	10500	30
18095104	PANTRY NEEDS NO. 1	2233 HWY. 12	WAVELAND	MS 12369	811 5554788	30	702	10500	30
17330008	SHELL STATION NO. 20	6611 JACKSON STREET	BOGALUSA	LA 74589	504 6889874	40	702	10500	40
17330107	SHELL STATION NO. 21	222 WEST MINSTRAL STREET	MERIDIAN	MS 78965	601 5698745	40	702	10500	40
17300001	SHELL STATION NO. 15	8745 TEXAS DRIVE	KENNER	LA 78965	504 7441212	50	702	10500	50
17300100	SHELL STATION NO. 16	5400 WASHINGTON STREET	NEW ORLEANS	LA 70458	504 8996688	50	702	10500	50
18082500	SHELL STATION NO. 6	5533 ROSE STREET	NATCHEZ	MS 89654	601 6654785	60	702	10500	60
18082104	SHELL STATION NO. 7	9900 HWY 81 WEST	AUSTIN LLE	TX 74158	801 8745896	60	702	10500	60

** END OF REPORT **

Printing A Delivery Route List

The Delivery Routes Listing application is used to print a list of delivery routes.

```
User: JEANNINE          Menu: CURCV1          Date: 5/08/06

===== > C U S T O M E R   R E P O R T S <=====
=====
|||||||
THE  ||          1. Corporate Master Changes
DAC  ||          2. Customer Master Changes
SYSTEM ||        3. Purge File Changes
|||||||          4. Customer Address Listing
|||           5. Corporate Address Listing
|||           6. Chain Address Listing
|||           7. Call Route(s) Listing
|||           8. Delivery Route(s) Listing
|||           9. Sales Rep. Customer Listing
|||          10. Customer Credit Report

M E N U   C A L L S
19. Customer Related #1  20. Special Cust. Reports  21. Reports
22. File Maintenance    23. Dac Main Menu      90. Sign Off

=====
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==>
```

1. Select option 8 (Delivery Routes Listing) from the Customer Reports screen. The Prompt For Route Listing screen appears.

```
DSWMPVR  ENTER  Creative Data Research-SUPPORT      8/17/99 16:56:09
                          Prompt For Route Listing

Put A "Y" Beside Each Day That You Want A Route List For.

                          Monday .          * Delivery Routes *
                          Tuesday
                          Wednesday
                          Thursday
                          Friday .
                          Saturday
                          Sunday .

                          Beginning Route

                          Ending Route
                          Report Version      ( 1 or 2 )

F3=Exit  F6=Print
```

2. Enter *Y* in the selection column next to the desired delivery route days.
3. If necessary, enter a route code for the **Beginning Route** and **Ending Route** (6,a) fields.
4. Enter *1* for the **Report Version** (1,n) field.
5. Press <F6> (Print).
6. Press <Enter> when prompted to confirm.

Delivery Route List

Creative Data Research-SUPPORT		Delivery Route 1 Listing		JTIPPIN	DSXEPR	8/17/99 16:57:22 Page 1		Stop
Cust.	Name	Address Line 1	City	Phone	Phone	Stop	Stop	Stop
Route 1 201	TRUCK #1 TUESDAY							
100035	ABC	P.O. BOX 44	LULING	MS 800	8481234	1		
107300	BILTON GAS	444 DAN STREET	METAIRIE	LA 504	8811330	2		
121745	DISCOUNT SERVICES	2145 WEST 10TH STREET	JACKSON	MS 956	2365897	50		
100075	AIRLINE ROAD TEXACO	601 AIRLINE ROAD	NEW ORLEANS	LA 205	8813452	60		
121765	DISCOUNT QUICK STOP	2145 EAST WYOMING STREET	HATTIESBURG	MS 852	6958852	80		
152000	MERVIN TOBACCO	6720 LINCOLN STREET	HOUSTON	TX 966	3665874	90		
147125	LACEY'S SPRING PHILLIP 66	529 HWY 231 SOUTH	LACEY'S SPRING	AL 205	8831169	100		
147100	LACEMAN INC.	34821 GRAVEL STREET	KENNER	LA 655	8996523	110		
107214	VIDEO DEPOT	870 HWY. 90 SOUTH	FRANKLINTON	LA 504	6632201	120		
110267	BROAD'S RESTAURANT	1234 AVE. J	GULFPORT	MS 205	8809494	140		
136000	HILLVIEW DISTRIBUTORS	1134 SOUTH HWY 66	BAYOU BLUE	LA 333	5662354	150		
176700	STARBRITE QUICK STOP	51234 HWY. 21 NORTH	NEW ORLEANS	LA 504	5888569	160		
120510	DEANIE'S GROCER	657 SYCAMORE DRIVE	FOLSOM	LA 563	8596321	170		
159500	LACEMAN CHEVRON	456 HWY 654	HOUMA	LA 322	5698741	180		
136500	HOYTAN ELEMENTARY	677 MADISON AVENUE	GRAND ISLE	LA 988	3669002	190		
136400	LACETON TOBACCO PRODUCTS	490 HWY 95	HATTIESBURG	MS 522	6332010	200		
156050	MORGAN'S INC.	2190 HWY. 25 SOUTH	HATTIESBURG	MS 633	9637410	210		
167000	RAYMOND'S EXXON	778 HWY. 65	CROSS ROADS	MS 601	5556969	220		
114800	CHARTER COMMUNICATIONS	3443 VIRGINIA STREET	FOLSOM	LA 205	8253226	230		
178999	TOBERMAN'S TOBACCO	3300 BLAKE BLVD.	MERIDIAN	MS 601	9557401	240		
185755	INTERSTATE 10 SUPER STORE	1103 I-10 EAST	TYLER	TX 988	7401258	250		
160817	PARTY TREAT	2299 MISSISSIPPI AVE.	SHREVEPORT	LA 445	6347720	280		
101780	JOHNEY'S EXXON	3245 SOUTH DERBIGNY	BURAS	LA 655	9870203	290		
166717	DISCOUNT GROCERS	679 HWY 54 SOUTH	POPLARVILLE	MS 258	6528974	300		
151100	MADISON SHIPYARD	9087 WASHINGTON STREET	TUPELO	MS 522	8965214	310		
129800	GLENDALE DISCOUNT	655 MEMORIAL DRIVE	LOBECK	TX 655	9924558	350		
116712	COLONIAL PENN	201 CAUSEWAY BLVD.	MANDEVILLE	LA 205	6281258	360		
100540	SPARKTON SHOP	5413 ARIZONA STREET	ALEXANDRIA	LA 504	2236589	380		
156215	MOUNTAIN SPRINGS PRIMARY	726 AVE. G	AUSTIN	TX 855	9633698	390		

** END OF REPORT **

Printing A Customer List By Sales Representative

The Sales Rep Customer Listing application is used to print a list of customers assigned to a sales representative.

```
User: JEANNINE          Menu: CURCV1          Date: 5/08/06

===== > C U S T O M E R   R E P O R T S < =====
=====
|||||||
THE   ||          1. Corporate Master Changes
DAC   ||          2. Customer Master Changes
SYSTEM ||        3. Purge File Changes
|||||||          4. Customer Address Listing
|||          5. Corporate Address Listing
||          6. Chain Address Listing
||          7. Call Route(s) Listing
||          8. Delivery Route(s) Listing
||          9. Sales Rep. Customer Listing
||         10. Customer Credit Report

M E N U   C A L L S
19. Customer Related #1  20. Special Cust. Reports 21. Reports
22. File Maintenance    23. Dac Main Menu      90. Sign Off

=====
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===>
```

1. Select option 9 (Sales Rep Customer Listing) from the Customer Reports screen. The Prompt Sales Rep Cust Lst screen appears.

```
BSORPVR  ENTER  Creative Data Research-SUPPORT      8/17/99 18:57:08
                          Prompt Sales Rep.Cust.Lst

Print Check Digit Y/N Y

Beginning Sales Rep

Ending Sales Rep . 999999

F3=Exit  F4=Search  F6=Print
```

2. Enter *Y* (yes) or *N* (no) for the **Print Check Digit** (1,a) field.
3. If necessary, enter an employee number for the **Beginning Sales Rep** and **Ending Sales Rep** (6,a) fields to limit the list of customers to those assigned to a designated sales representative. Users can press <F4> to select an employee code from the Select Employee Master screen.
4. Press <F6> (Print).
5. Press <F3> to exit. The Customer Reports screen appears.

Customer List By Sales Representative

Creative Data Research-SUPPORT		Sales Rep Customer List		JTIPPIN	BSOQFPR	8/17/99 17:18:28 Page 1		
Customer Number	Name	City / State	Store Number	Terms Code	Phone	Last Order Date	Last Pay Date	
Sales Rep. 26 REGGIE JOHNSON								
104740	B & W ROUTE MART	POPLARVILLE MS	1		205 233-5511	4/08/98	1/30/98	
106180	BETHSTON MART	BETHSTON MS	1		256 423-6307	5/20/98	5/22/98	
111030	BUSY SHOP	COLUMBIA MS	1		205 787-9212	5/25/98	5/26/98	
111200	BUTTARD MART	TUPELO MS	1		205 868-7145	5/21/98	5/25/98	
119530	C & A FOOD MART	LUBBOCK TX	1		256 899-5632	5/26/98	5/26/98	
151252	CHARITY HOSPITAL	TUPELO MS	1		205 884-7958	1/08/98	4/07/98	
100935	CORNER STOP	BURAS LA	1		312 98-7654	5/25/98	5/26/98	
101022	COVE SERVICE STATION	THIBODEAUX LA	2		654 789-6541	5/26/98	5/21/98	
120020	DAILY TEXACO	FRANKLINTON LA	1		654 932-8711	5/21/98	5/25/98	
100407	DANIEL'S GROCERY	ABITA SPRINGS LA	2		987 325-4169	8/17/99	5/25/98	
125080	ELKINSON FOODS	FORT WORTH TX	2		632 220-0147	9/09/98	5/22/98	
167230	ELVON TEXACO	HOUSTON TX	0		554 215-8991	5/20/98	5/21/98	
126140	FAMILY TREASURES	LIVINGSTON TX	1		331 117-5214	2/26/98	3/03/98	
128609	FREE STYLE SHOP	KENNER LA	1		755 897-4561	4/07/98	4/09/98	
133337	HANDY MART	HATTIESBURG MS	1		22 369-8521	5/26/98	5/21/98	
138760	HWY ROAD SERVICE	BURAS LA	1		322 588-9001	4/08/98	4/10/98	
153137	J & G ENTERPRISES	WAVELAND MS	2		321 611-4874	5/20/98	5/21/98	
139605	J K'S HARDWARE	NATCHEZ MS	2		366 255-8963	5/26/98	5/26/98	
139900	JACKIE'S SUPPLY CO.	ABITA SPRINGS LA	1		211 655-4789	5/20/98	5/22/98	
153153	JIFFY MART	HOUMA LA	1		322 965-8744	5/25/98	5/22/98	
153149	JIFFY TOP MART	FOLSOM LA	1		699 355-9852	5/20/98	5/22/98	
144099	JOE'S TOBACCO	METAIRIE LA	1		311 555-9874	2/02/98	2/04/98	
101780	JOHNNY'S EXXON	BURAS LA	1		655 987-0203	5/25/98	5/26/98	
101730	JOHNSTON'S QUICK SHOP	SAN ANTONIO TX	1		255 963-5698	2/24/98	2/26/98	
143975	JORDAN LAKE ENTERPRISES	HATTIESBURG MS	0		655 963-3698	5/14/98	5/18/98	
100055	KELLY GREEN FABRICS	WIGGINS MS	2		601 633-2201	5/26/98	5/14/98	
101083	LAWRENCE TOBACCO	HATTIESBURG MS	2		322 966-3258	9/09/98	5/26/98	
159373	OAKSIDE PRODUCE	FRANKLINTON LA	1		977 455-2558	5/25/98	5/26/98	
163350	PINE CHURCH	SUN LA	1		774 744-1258	5/26/98	5/22/98	
171340	SAM'S WHOLESALE	FRANKLINTON LA	1		504 966-5588	5/18/98	5/26/98	
175850	SPORTS ARENA	SHREVEPORT LA	1		504 877-4411	5/25/98	5/20/98	
100411	SUPER BRANDS SHOP	FRANKLINTON LA	1		504 646-5509	9/09/98	5/21/98	
147383	TOMA'S QUICK STOP	JACKSON MS	2		855 963-5810	9/09/98	5/18/98	
181533	TRIANGLE TOBACCO	WAVELAND MS	1		601 889-7451	5/21/98	5/22/98	
183500	WARNER'S STORE	COVINGTON LA	2		504 632-5520	5/21/98	5/22/98	
184677	WATERTON ENTERPRISES	FRANKLINTON LA	1		504 998-7401	5/21/98	5/22/98	
184409	WEST TENTH STREET GROCER	HOUMA LA	1		504 620-3661	5/25/98	5/20/98	
125110	WIN MART	KENNER LA	1		504 833-6620	5/20/98	5/22/98	

** END OF REPORT **

Printing A Customer Credit Report

The Customer Credit Report application is used to print a list of credits issued to customers within a designated date range.

```
User: JEANNINE          Menu: CURCV1          Date: 5/08/06

===== > C U S T O M E R   R E P O R T S <=====
=====
|||||
THE   ||          1. Corporate Master Changes
DAC   ||          2. Customer Master Changes
SYSTEM ||        3. Purge File Changes
|||||           4. Customer Address Listing
|||           5. Corporate Address Listing
||           6. Chain Address Listing
||           7. Call Route(s) Listing
||           8. Delivery Route(s) Listing
||           9. Sales Rep. Customer Listing
||          10. Customer Credit Report

M E N U   C A L L S
19. Customer Related #1 20. Special Cust. Reports 21. Reports
22. File Maintenance   23. Dac Main Menu       90. Sign Off

=====
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===>
```

1. Select option 10 (Customer Credit Report) from the Customer Reports screen. The Prompt For Customer Credit Report screen appears.

```
DCHPPVR  ENTER  Creative Data Research          5/08/06 16:09:15
                Prompt For Customer Credit Report

Type choices, press Enter.

From Date:
To Date:

From Cust:
To Cust:

  ** OR **

From Corp:
To Corp:

F3=Exit  F4=Search  F6=Print
```

2. Enter a range of dates for the **From Date** and **To Date** (6,n) fields to limit the credits which are included in the report.
3. Enter data for one of the following:
 - **From Cust** and **To Cust** (6,n) fields - the desired customer numbers may be entered to limit the report to a group of customers, or a single customer number may be entered to limit the report to one customer. If necessary, press <F4> to select a number from the Select Customer Master screen.
 - **From Corp** and **To Corp** (6,n) fields - the desired corporate numbers may be entered to limit the report to a group of corporate customers, or a single corporate number may be entered to limit the report to one corporate customer.
4. Press <F6> (Print).
5. Press <F3> to exit. The Special Customer Reports screen appears.

Customer Credit Report

Creative Data Research		Customer Credit Report		JEANNINE DCHOPFR		5/08/06 16:36:35 Page 1	
Cust #	Name	Inv. #	Date	Total	Rsn Description	Ctns	Cig Amount
700200	AMERICA'S STORE #103	8060	10/21/03	235.93-	A Restock/Apply Fee	7-	172.39-
700200	AMERICA'S STORE #103	8108	11/14/03	41.24-	S Shipping Error	12-	41.24-
700200	AMERICA'S STORE #103	8112	11/14/03	41.24-	S Shipping Error	12-	41.24-
700200	AMERICA'S STORE #103	8099	11/20/03	595.58-	C Customer Refused	20-	565.98-
700200	AMERICA'S STORE #103	8527	3/30/06	299.00-	D Damaged	10-	299.00-
Totals For: 700200 AMERICA'S STORE #103				1,212.99-		61-	1,119.85-
Final totals				1,212.99-		61-	1,119.85-
** END OF REPORT **							

Printing A Customer Price Book

The Customer Price and Retail List application is used to print the Customer Price/Retail List (also called customer price book). It contains the customer's price and retail amounts of one or all of the following, as designated by the user:

- Items that the customer has purchased.
- Items that are designated in the customer/item record for printing in the customer's price book.
- Items that are designated in the customer/item record as authorized for purchase.

The price book can be printed for a single customer or a group of customers, for a sales class, book heading or product class range, for any unit of measure, and with an index.

Refer to Adjusting UPCs Before Printing below for information about using a customer's invoice options record to modify the UPCs appearing in a customer's price book.

Users can also create text data and spreadsheet files which, unlike the spooled file, includes the universal product code (UPC) numbers for all units of measure. The text data and spreadsheet files are created as DAT and CSV, respectively. Refer to Appendix A for the file definition of the text data file.

If outbound email functionality is enabled on the distributor's system, price book reports and indexes can be automatically emailed to customers as PDF file attachments. Users can also email text data and spreadsheet files as DAT and CSV files as attachments respectively. Refer to Emailing Customer Price Books of the System File Maintenance document for additional information.

Refer to the following for related information:

- Adding Item Records of the Item File Maintenance document for information about the **Book Exclusion** field of item records.
- Working With Customer/Item Records of the Billing File Maintenance document for information about the **Authorized Flag** field of customer/item records.
- Using Work With Customer/Item Flags of the Billing File Maintenance document for information about the **Customer's Category** and **Customer's Class** fields.
- Working With Customer Invoice Options of the Billing File Maintenance document for information about the **Use Custom Class Sort?** field of the customer invoice options records.

Refer to Working With Item Reports of the Item File Maintenance document for information about printing salesman and in-house price books.

```

User: JEANNINE           Menu: CURCV1           Date: 5/22/17

===== > C U S T O M E R   R E P O R T S < =====
=====
|||||||
THE   ||                1. Corporate Master Changes
DAC   ||                2. Customer Master Changes
SYSTEM ||              3. Purge File Changes
|||||||                4. Customer Address Listing
|||||||                5. Corporate Address Listing
|||||||                6. Chain Address Listing
|||||||                7. Call Route(s) Listing
|||||||                8. Delivery Route(s) Listing
|||||||                9. Sales Rep. Customer Listing
|||||||               10. Customer Credit Report
|||||||               11. Customers by Tax Jurisdiction
|||||||                M E N U   C A L L S
19. Customer Related #1 20. Special Cust. Reports 21. Reports
22. File Maintenance  23. Dac Main Menu          90. Sign Off

===>

```

1. Select option 20 (Special Cust. Reports) from the Customer Reports screen. The Special Customer Reports screen appears.

```

User: JEANNINE           Menu: CUSPCV1          Date: 5/22/17

===== > S P E C I A L   C U S T O M E R   R E P O R T S < =====
=====
|||||||                1. Customer Price & Retail List
THE   ||                2. Authorized Item List
DAC   ||                3. Velocity Report
SYSTEM ||              4. Customer Weekly Report
|||||||                5. Price Change Notification
|||||||                6. Print Customers With Invalid Codes
|||||||                7. Office Staff Price List
|||||||                8. Print future price changes
|||||||                9. Print Account Analysis
|||||||               10. Monthly Cigarette Sales
|||||||                M E N U   C A L L S
19.                               20. Customer Reports          21.
22.                               23. Dac Main Menu           90. Sign Off

=====
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===>

```

2. Select option 1 (Customer Price & Retail List) from the Special Customer Reports screen. The Prompt For Customer Book screen appears.

```

DSREPVF  ENTER  CDR Customer Conference           5/22/17 14:03:15
                Prompt For Customer Book

                CUSTOMIZED PRICE AND RETAIL LIST

Customer Number _____
* OR *
Cust Collection _____

Beg Sales Class _____ *OR* Beg Book Head. _____ *OR* Beg Prod Class _____
End Sales Class _____ End Book Head. _____ End Prod Class _____

Print Book Exclude? N (Y/N)
Vendor Number _____ (Use As A Further Restrictor)
Item Collection _____ (Use As A Further Restrictor)
Use Allowances? . . . N (Y/N)
Item Selection . . . _ (Press ? For Allowed Values)
Unit Of Measure SSU (To Print Price In: SSU, EA., UML-UM4)
Job Queue BOOK_____
Sort By Custom Cat? N Sort Option For FBI D (Price Book Index)
Output Data To File? N (Y/N) Email Report And/Or File? N (Y/N)
File Name . PRICEBK_.DAT Folder CV1COM_____
F3=Exit F4=Search F6=Print

```

3. Enter data for one of the following fields:
 - **Customer Number** (6,n) - a customer number. If necessary, press <F4> to select a number from the Select Customer Master screen.
 - **Cust Collection** (6,n) - a customer collection number. If necessary, press <F4> to select or create a collection. Refer to Working With Customer Collections above, beginning with step 3, for additional instructions.

The message below appears if a customer collection is used to create text data file.

```
A CUSTOMER COLLECTION & OUTPUT FILE ARE REQUESTED

The file naming scheme used will be CPXXXXXX.DAT
where the X's are the customer number.
A separate file is created per customer.
* You may want to create a special folder to hold
them and specify it.

F3=Exit
```

Press <F3> (Exit), and contact CDR support personnel for information, if necessary, to manually create a new folder for all the files that will be created for the customer collection.

4. Enter data for one of the following fields:
 - **Beginning Class** and **Ending Class** (5,n) - a sales class number, or range of numbers, are entered to designate the items included in the price book. If necessary, press <F4> to select a number from the Select Sales Class Master screen.
 - **Beg Book Head.** and **End Book Head.** (4,a) - a book heading code, or range of codes, are entered to designate the items included in the price book. If necessary, press <F4> to select a number from the Select Book Heading screen. Note: Heading codes are numbers which are entered as alphanumeric characters; therefore, users should enter preceding zeros. For example, *0010* should be entered to designate the number 10.
 - **Beg Prod Class** and **End Prod Class** (5,n) - a product class number, or range of numbers are entered to designate the items included in the price book. If necessary, press <F4> to select a number from the Select Product Class screen.
5. To include the retail amount of the unit of measure designated by the **Unit Of Measure** field (see below), enter 2 for the **Version 1,2** (1,a) field. The **Version 1,2** field only appears if the price book is printed by sales class.
6. To include “book-excluded” items in the price book, enter Y for the **Print Book Exclude?** (1,a) field. Refer to Adding Item Records of the Item File Maintenance document for information about the **Book Exclusion** field of item records.
7. To designate that only items of a specific vendor are included in the price book, enter a vendor code for the **Vendor Number** (6,a) field. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.

8. To include selling allowances in the calculation of the customer's prices, enter *Y* (yes) for the **Use Allowances?** (1,a) field. If a selling allowance exists, the *Above Item Has An Allowance* message appears with details about the allowance in the price book.

9. Enter one of the following values for the **Item Selection** (1,a) field to designate which items are included in the price book, or leave the field blank to include all items:
 - *A* - the item is authorized for purchase.
 - *B* - the item can be printed in the customer's price book.
 - *P* - the item was previously purchased by the customer.
 Refer to Working With Customer/Item Records of the Billing File Maintenance document for information about the **Authorized Flag** field of customer/item records.

10. Enter one of the following values for the **Unit Of Measure** (3,a) field to designate for which selling level the items' prices are printed in the price book:
 - *SSU* - the standard selling unit of measure.
 - *EA.* - the first selling level (**U/M1** field of item records).
 - *UM1, UM2, UM3* or *UM4* - any one of the four selling levels (**U/M1 - U/M4** fields of item records).

11. If necessary, enter a different job queue for the **Job Queue** (10,a) field.

12. To print the items in order by the customer's, rather than the distributor's, category or class, enter *Y* (yes) for the **Sort By Custom Cat?** (1,a) field. After sorting by customer category or class, the items are sorted by item description in the spooled file.

Sales classes must be used (see **Beginning Class** and **Ending Class** above) to sort by customer category or class. Refer to Using Work With Customer/Item Flags of the Billing File Maintenance document for information about the **Customer's Category** field.

13. To print the price book index, enter one of the following values for the **Sort Option For PBI** (1,a) field to designate the sorting criteria:
 - *D* - item description
 - *N* - item number.

14. To create text data and spreadsheet files for an individual customer, enter data for the following fields:
 - **Output Data To File?** (1,a) - *Y* (yes).
 - **File Name** (8,a) - file name for the text data file which will be generated with a DAT extension, and the spreadsheet file which will be generated with a CSV extension.
 - **Folder** - name of the folder where the files will be located.

15. To create text data and spreadsheet files for a customer collection, enter data for the following fields:
 - **Output Data To File?** (1,a) - *Y* (yes).
 - **Folder** - name of the folder where the files will be located.The text data and spreadsheet files are named CP#s.DAT and CP#s.CSV respectively, where #s is the number of each customer of the collection.

16. To automatically email the customer price book and index (as PDF file attachments), the text data file (as a DAT file attachment), and the spreadsheet file (as CSV file attachment) to customers, enter *Y* (yes) for the **Email Report And/Or File?** (1,a) field. The price books are not printed on the distributor's system if they are emailed, but will appear as documents in the DACEMAIL folder. The text data and spreadsheet files will appear as documents in the folder as designated by the user.

17. Press <F6> (Print) to print or email the reports. The *Price Book Submitted To Job Queue* message appears.

Customer Price/Retail List By Sales Class - Version 1

Creative Data Research		Custom Price/Retail List		JEANNINE	DSRGPF	9/05/06 10:43:08	Page	1	
SPECIAL CUSTOMER SERVICES									
For Class 998 - 998		Price & Retail List For → AMERICA'S STORE #102			700100				
Item #	Description	UPC Number	Unit	MOQ/Rtn	Packed	Retail Pk	Full Price/Each Price	Retail	Pct
Sales Class 998 GROCERY									
172407	BUSH CHILI HOT BEANS 16 OZ		CAN		1 CAN 16 OZ		.45 .90		50.00
172167	BUSH DK RED KIDNEY BEAN 15 OZ		CAN		1 CAN 15 OZ		.45 .90		50.00
173690	DM CREAM STYLE CORN 17 OZ		CAN		1 CAN 17 OZ		.56 1.12		50.00
171280	DM CUT GREEN BEANS 16 OZ		CAN		1 CAN 16 OZ		.61 1.22		50.00
171381	DM FR STYLE GREEN BEANS 16 OZ		CAN		1 CAN 16 OZ		.59 1.18		50.00
175594	DM PEAS & CARROTS 16 OZ		CAN		1 CAN 16 OZ		.71 1.42		50.00
176267	DM SPINACH 15 OZ		CAN		1 CAN 15 OZ		.56 1.12		50.00
175479	DM SUGAR PEAS 17 OZ		CAN		1 CAN 17 OZ		.61 1.22		50.00
173892	DM WHOLE KERNEL CORN 17 OZ		CAN		1 CAN 17 OZ		.55 1.10		50.00
177410	EL PASO REFRIED BEAN 16 OZ		CAN		1 CAN 16 OZ		.81 1.62		50.00
174235	FRANKS SAUERKRAUT 14 OZ		CAN		1 CAN 14 OZ		.46 .92		50.00
174312	FRANKS SAUERKRAUT 32 OZ		CAN		1 CAN 32 OZ		1.07 2.14		50.00
176584	HUNTS STEWED TOMATOES 14 OZ		CAN		1 CAN 14 OZ		.71 1.42		50.00
176610	HUNTS TOMATO PASTE 6 OZ		CAN		1 CAN 6 OZ		.40 .80		50.00
176723	HUNTS TOMATO SAUCE 8 OZ		CAN		1 CAN 8 OZ		.30 .60		50.00
176545	HUNTS WHOLE TOMATOES 14.5 OZ		CAN		1 CAN 14.5 OZ		.65 1.30		50.00
172357	J ARC KIDNEY BEANS 15 OZ		CAN		1 CAN 15 OZ		.48 .96		50.00
175947	LIBBY PUMPKIN 16 OZ		CAN		1 CAN 16 OZ		.81 1.62		50.00
171278	RAINBOW CUT GREEN BEAN 16 OZ		CAN		1 CAN 16 OZ		.33 .66		50.00
175253	RAINBOW SWEET PEAS 16 OZ		CAN		1 CAN 16 OZ		.37 .74		50.00
173854	RAINBOW WHOLE KERNAL CORN 16 OZ		CAN		1 CAN 16 OZ		.38 .76		50.00
174603	TV MUSHROOMS PCS/STEMS 4 OZ		CAN		1 CAN 4 OZ		.56 1.12		50.00
174742	TV MUSHROOMS PCS/STEMS 8 OZ		CAN		1 CAN 8 OZ		1.10 2.20		50.00
171874	TV SLICED CARROT 16 OZ		CAN		1 CAN 16 OZ		.37 .74		50.00
175784	TV WHOLE POTATO 16 OZ		CAN		1 CAN 16 OZ		.43 .86		50.00
172888	VC PORK & BEANS 16 OZ		CAN		1 CAN 16 OZ		.53 1.06		50.00
172902	VC PORK & BEANS 21 OZ		CAN		1 CAN 21 OZ		.71 1.42		50.00
174401	VEG-ALL MIXED VEGETABLE 12 OZ		CAN		1 CAN 12 OZ		.58 1.16		50.00

** END OF REPORT **

Customer Price/Retail List By Sales Class - Version 2

Creative Data Research		Custom Price/Retail List3		JEANNINE	GWEKPF	9/05/06 10:43:14	Page	1	
SPECIAL CUSTOMER SERVICES									
For Class 998 - 998		Price & Retail List For → AMERICA'S STORE #102			700100				
Item #	Description	UPC Number	Unit	MOQ/Rtn	Packed	Retail Pk	Full Price Retail	Each Price Retail	Pct.
Sales Class 998 GROCERY									
172407	BUSH CHILI HOT BEANS 16 OZ		CAN		1 CAN 16 OZ		.45 .90	.45 .90	50.00
172167	BUSH DK RED KIDNEY BEAN 15 OZ		CAN		1 CAN 15 OZ		.45 .90	.45 .90	50.00
173690	DM CREAM STYLE CORN 17 OZ		CAN		1 CAN 17 OZ		.56 1.12	.56 1.12	50.00
171280	DM CUT GREEN BEANS 16 OZ		CAN		1 CAN 16 OZ		.61 1.22	.61 1.22	50.00
171381	DM FR STYLE GREEN BEANS 16 OZ		CAN		1 CAN 16 OZ		.59 1.18	.59 1.18	50.00
175594	DM PEAS & CARROTS 16 OZ		CAN		1 CAN 16 OZ		.71 1.42	.71 1.42	50.00
176267	DM SPINACH 15 OZ		CAN		1 CAN 15 OZ		.56 1.12	.56 1.12	50.00
175479	DM SUGAR PEAS 17 OZ		CAN		1 CAN 17 OZ		.61 1.22	.61 1.22	50.00
173892	DM WHOLE KERNEL CORN 17 OZ		CAN		1 CAN 17 OZ		.55 1.10	.55 1.10	50.00
177410	EL PASO REFRIED BEAN 16 OZ		CAN		1 CAN 16 OZ		.81 1.62	.81 1.62	50.00
174235	FRANKS SAUERKRAUT 14 OZ		CAN		1 CAN 14 OZ		.46 .92	.46 .92	50.00
174312	FRANKS SAUERKRAUT 32 OZ		CAN		1 CAN 32 OZ		1.07 2.14	1.07 2.14	50.00
176584	HUNTS STEWED TOMATOES 14 OZ		CAN		1 CAN 14 OZ		.71 1.42	.71 1.42	50.00
176610	HUNTS TOMATO PASTE 6 OZ		CAN		1 CAN 6 OZ		.40 .80	.40 .80	50.00
176723	HUNTS TOMATO SAUCE 8 OZ		CAN		1 CAN 8 OZ		.30 .60	.30 .60	50.00
176545	HUNTS WHOLE TOMATOES 14.5 OZ		CAN		1 CAN 14.5 OZ		.65 1.30	.65 1.30	50.00
172357	J ARC KIDNEY BEANS 15 OZ		CAN		1 CAN 15 OZ		.48 .96	.48 .96	50.00
175947	LIBBY PUMPKIN 16 OZ		CAN		1 CAN 16 OZ		.81 1.62	.81 1.62	50.00
171278	RAINBOW CUT GREEN BEAN 16 OZ		CAN		1 CAN 16 OZ		.33 .66	.33 .66	50.00
175253	RAINBOW SWEET PEAS 16 OZ		CAN		1 CAN 16 OZ		.37 .74	.37 .74	50.00
173854	RAINBOW WHOLE KERNAL CORN 16 OZ		CAN		1 CAN 16 OZ		.38 .76	.38 .76	50.00
174603	TV MUSHROOMS PCS/STEMS 4 OZ		CAN		1 CAN 4 OZ		.56 1.12	.56 1.12	50.00
174742	TV MUSHROOMS PCS/STEMS 8 OZ		CAN		1 CAN 8 OZ		1.10 2.20	1.10 2.20	50.00
171874	TV SLICED CARROT 16 OZ		CAN		1 CAN 16 OZ		.37 .74	.37 .74	50.00
175784	TV WHOLE POTATO 16 OZ		CAN		1 CAN 16 OZ		.43 .86	.43 .86	50.00
172888	VC PORK & BEANS 16 OZ		CAN		1 CAN 16 OZ		.53 1.06	.53 1.06	50.00
172902	VC PORK & BEANS 21 OZ		CAN		1 CAN 21 OZ		.71 1.42	.71 1.42	50.00
174401	VEG-ALL MIXED VEGETABLE 12 OZ		CAN		1 CAN 12 OZ		.58 1.16	.58 1.16	50.00

** END OF REPORT **

Adjusting UPCs Before Printing

Users have the option of modifying the UPC numbers that are printed in a price book on a per customer basis. The instructions below describe using a customer's invoice option record to designate the UPC changes. These changes do not affect the UPC numbers of the Item Master and UPC Scan Master files, but are saved for future printing of the customer's price book.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 3 (Billing Related Maintenance) from the File Maintenance screen. The Billing File Maintenance #1 screen appears.
3. Select option 19 (BF Maintenance #2) from the Billing File Maintenance #1 screen. The Billing File Maintenance #2 screen appears.

```

User: JEANNINE           Menu: BFM2CV1           Date: 8/19/13

===== > B I L L I N G   F I L E   M A I N T E N A N C E   # 2 <=====
=====
|||||||
THE  ||                   1. Work With Customer Category Descs.
DAC  ||                   2. Work With Customer Categories
SYSTEM ||                 3. Update C/I File With Customer Categories
|||||||                   4. Create/Update Authorized Item Records
|||||||                   5. Edit Billing Reasons
|||||||                   6. Work With Invoice Boxes
|||||||                   7. Define Invoice Boxes
|||||||                   8. Define Invoice Messages
|||||||                   9. Order Status Change(Caution!!!)
|||||||                  10. Work With Customer Invoice Options
|||||||                  11. Work With Special Billing Charges
|||||||                   M E N U   C A L L S
19. VoCollect Maint      20. Billing System           21. Billing Reports
22. File Maintenance     23. Dac Main Menu           90. Sign Off
=====
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==>

```

4. Select option 10 (Work With Customer Invoice Options) from the Billing File Maintenance #2 screen. The Work With Customer Invoice Options screen appears.

```

BSRJDFR  DISPLAY CDR Customer Conference           8/19/13 15:32:06
                Work With Customer Invoice Options

Position  Edit
Customer  Customer
-----  -----

Type options, press Enter.
2=Edit Record

? Application  Customer  Customer Name
   ID          Number
-   002         99000    99 MART PLUS
-   002        100001    STOP 'N SHOP
-   002        100002    DIANNE'S GROCERY
-   002        100003    BOB'S SHELL
-   002        100004    SNYDER'S STOP & GO
-   002        100222    TODD'S COUNTRY CORNER
-   002        100301    THREE RIVERS CHEVRON
-   002        100801    BARON EXPRESS #2 BF
-   002        100802    CRANKY CORNER QUICK STOP
-   002        100850    EXPRESS WAY FOOD MART
                                                    +

F3=Exit F4=Search  F8=Customer Label Opts  F9=Order Splits  F10=Add

```

5. Enter the desired customer's number for **Edit Customer** field, and press <Enter>. The Customer Invoice Options screen appears.

```

BSRFE1R  CHANGE  CDR Customer Conference      8/19/13 15:45:15
                          Customer Invoice Options

H.M. Application Id :    002      Invoice Alternate Sorting
Customer Number . . . : 100003  BOB'S SHELL
Use Alternate Sort: . . . _      (Yes,No,*Blank)      Split Cust Remote Orders _
Print Which UPC? . . . _      (1-4, *Blank)
Omit P & L? . . . . . _      (Yes, No, *Blank)
Print Each Price? . . . _      (Yes, No, *Blank)
(NOTE: Each price will print in place of retail on invoice.)
Page Break On Category? _      (Yes, No, *Blank)
(NOTE: This only applies to the category sort.)
Customer P.O.: _____      (Enter either a P.O. # or *YES)
Print Extended Retail? _      (Yes, No, *Blank)
Hide Unit/Ext. Price? _      (Yes, No, *Blank)
Print Check In Document _      (Yes, No, *Blank)
Use Custom Class Sort? _      (Yes, No, *Blank)
Exclude From State Msg? _      (Yes, No, *Blank)

Invoice Primary/Alternate Sorts:
Invoice: H      Primary Sort: L  Region/Location
              Alternate Sort: C  Category/Item Description
F3=Exit  F8=More UPC Options  F11=Delete

```

6. Press <F8> (More UPC Options). The Edit More UPC Options screen appears.

```

CVW2PVR  ENTER  CDR Customer Conference      8/20/13 10:28:38
                          Edit More Upc Options

Type choices, press Enter.

Print Order Scan Sheet . . . . _ (*Blank, Y or N)

For UPC with Length of . . . _

Drop First . . . . . _
Drop Last . . . . . _

Leading Zeros to Append 1-3 _

U/M For Future Price Chg Rpt . _ (1-4, *Blank)

F3=Exit

```

7. Enter data for the following fields as necessary, and press <Field Exit> after each entry:

- **For UPC with Length of (2,n)** - enter a length of 15 or less to designate which UPC numbers are changed.
- **Drop First (1,n)** - enter 1, 2, or 3 to designate how many leading digits of the changed UPC numbers are not printed.
- **Drop Last (1,n)** - enter 1, 2, or 3 to designate how many ending digits of the changed UPC numbers are not printed.
- **Leading Zeros to Append 1-3 (1,n)** - enter 1, 2, or 3 to designate how many leading zeros are added to the UPC numbers that are changed.

8. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Customer Invoice Options screen appears.

9. Press <Enter> when prompted to confirm. The Work With Customer Invoice Options screen appears.

10. Press <F3> to exit. The Billing File Maintenance #2 screen appears.

Printing An Authorized Item List

The Authorized Item List application is used to print a list of all the items that a customer is authorized to buy. If the numbers used by the customer to classify and categorize items are entered in customer/item records, these are used to sort items before printing the authorized items list. Refer to Working With Customer/Item Records of the Billing File Maintenance document for information about the **Authorized Flag**, **Customer's Class** and **Customer's Category** fields of customer/item records.

```
User: JEANNINE           Menu: CUSPCV1           Date: 8/19/13

===== > S P E C I A L   C U S T O M E R   R E P O R T S <=====
=====
|||||||      1. Customer Price & Retail List
THE  ||      2. Authorized Item List
DAC  ||      3. Velocity Report
SYSTEM ||    4. Customer Weekly Report
|||||||      5. Price Change Notification
|||||||      6. Print Customers With Invalid Codes
|||||||      7. Office Staff Price List
|||||||      8. Print future price changes
|||||||      9. Print Account Analysis
|||||||     10. Monthly Cigarette Sales

                M E N U   C A L L S
19.                20. Customer Reports          21.
22.                23. Dac Main Menu           90. Sign Off

=====
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==>
```

1. Select option 2 (Authorized Item List) from the Special Customer Reports screen. The Prompt For Auth. Item Lst screen appears.

```
BSGEPVR  ENTER  CDR Customer Conference      8/19/13 14:47:24
                Prompt For Auth. Item Lst

Enter A Customer Number To Print An Authorized Item List For That Customer.

Customer Number _____

F3=Exit  F4=Search  F6=Print
```

2. Enter the desired customer number for the **Customer Number** (6,n) field, or press <F4> to select a number from the Select Customer Master screen.

```
BSGEPVR  ENTER  CDR Customer Conference      8/19/13 14:48:11
                    Prompt For Auth. Item Lst

Enter A Customer Number To Print An Authorized Item List For That Customer.

Customer Number 100002

F3=Exit  F4=Search  F6=Print
```

3. If <F4> was not used to select the customer number, <Enter> may be pressed to verify the customer name.

```
BSGEPVR  ENTER  CDR Customer Conference      8/19/13 14:48:11
                    Prompt For Auth. Item Lst

Enter A Customer Number To Print An Authorized Item List For That Customer.

Customer Number 100002  DIANNE'S GROCERY

F3=Exit  F4=Search  F6=Print
```

4. Press <F6> (Print). The Special Customer Reports screen appears.

Printing A Velocity Report

The Velocity Report application is primarily used to print a velocity report by sales class or item category for use by the distributor's customers. It can also be used by the distributor to analysis product sales to customers according to account type.

If outbound email functionality is enabled on the distributor's system, velocity reports can be automatically emailed to customers as a PDF or CSV file attachment. Item summary reports can also be emailed as PDF file attachments. Refer to *Emailing Velocity Reports of the System File Maintenance* document for additional informaton.

The data which can appear in a Velocity Report is limited by the number of days that invoice detail records are retented as history on the distributor's system. Refer to the *DAC Default System Options* document for information about the **Retention Days Inv. Hist** field of the SYS003 default system option. *Users should contact CDR support personnel before attempting to change the values of this record.* The values recommended for its fields will vary according to user requirements and system size.

The items of the velocity report can be sorted by profit amount, retail amount, or units sold. Users have the option of printing the velocity report with the items ranked according to the total quantity purchased by the retailer, or the total quantity sold by the distributor. A variety of summary reports can also be printed with the velocity report.

The following instructions describe using the Velocity By Date Range screen to generate velocity reports for a range of dates. Users have the option of generating reports for a range of weeks using the Prompt For Velocity Report screen.

If a range of weeks is used, the following appear on the Prompt For Velocity Report screen:

- **Beg Week** and **End Week** (2,n) fields - enter a range of number (1 through 53) for the fields to designate the range of weeks for which the velocity reports are printed.
- **Year Number** (2,n) field - enter the last two digits of the desired year, such as 11 for 2011, if more than one year of customer weekly analysis records is retained. This field is not available to use if Y is entered for the **Use Rolling Customer Wkly** field of the SYS003 default system option. *Users should contact CDR support personnel before attempting to change the value of this record.*

```

User: JEANNINE          Menu: CURCV1          Date: 4/04/13

===== > C U S T O M E R   R E P O R T S < =====
|||||||
THE   ||                1. Corporate Master Changes
DAC   ||                2. Customer Master Changes
SYSTEM ||              3. Purge File Changes
|||||||                4. Customer Address Listing
|||||||                5. Corporate Address Listing
|||||||                6. Chain Address Listing
|||||||                7. Call Route(s) Listing
|||||||                8. Delivery Route(s) Listing
|||||||                9. Sales Rep. Customer Listing
|||||||               10. Customer Credit Report

                          M E N U   C A L L S
19. Customer Related #1 20. Special Cust. Reports 21. Reports
22. File Maintenance   23. Dac Main Menu       90. Sign Off
=====
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```

1. Select option 20 (Special Cust. Reports) from the Customer Reports screen. The Special Customer Reports screen appears.

```

User: JEANNINE          Menu: CUSPCV1          Date: 4/04/13

===== > S P E C I A L   C U S T O M E R   R E P O R T S < =====
|||||||
THE   ||                1. Customer Price & Retail List
DAC   ||                2. Authorized Item List
SYSTEM ||              3. Velocity Report
|||||||                4. Customer Weekly Report
|||||||                5. Price Change Notification
|||||||                6. Print Customers With Invalid Codes
|||||||                7. Office Staff Price List
|||||||                8. Print future price changes
|||||||                9. Print Account Analysis
|||||||               10. Monthly Cigarette Sales

                          M E N U   C A L L S
19.                          20. Customer Reports       21.
22.                          23. Dac Main Menu       90. Sign Off
=====
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==>

```

2. Select option 3 (Velocity Report) from the Special Customer Reports screen. The Prompt For Velocity Report screen appears.

```

GSWAPVR  ENTER  CDR Customer Conference          4/04/13 11:38:37
                          Prompt For Velocity Report

Beg Corp. # _____ ** O R ** Beg Cust. # _____ ** O R ** Salesman _____
End Corp. # _____ End Cust. # _____ Cust. Collection _____

Account Type . . . _____ Print Cust/Item Velocity? Y
Warehouse . . . 1 Print Cust/Class *OR*
Beg Sales Class 00001 Print Cust/Group Summary? C (C,G)
End Sales Class 99999
Item Collection: _____ Print Corp/Class Summary? Y
Vendor Number . . . _____ Print Acct. Type/Item *OR*
Beg Week . . . 01 Print Corp/Item Summary? C (A,C)
End Week . . . 53 Print Item Summary? . . . _ (Y,N,Blank)
Year Number . . : 00 Print Item/Cust Summary? _ (Y,N,Blank)
Print Item/UPC 1 (? For Values)
Rank Option . . . R (? For Values) U/M For Price . . SSU (SSU, EA.)
Item Sort Option 1 (? For Values) Job Queue . . . BOOK
Version . . . . . 1 (? For Values) Output To PDF? _ (Y,N,Blank)
Use Custom Cat? _ (Y,N,Blank) Output To CSV? _ (Y,N,Blank)

F2=Load F4=Search F6=Print F7=Toggle Class F8=Vel. By Date F10=Save

```

3. Press <F8> (Vel. By Date) to print reports for a designated date range rather than a range of weeks. The Velocity By Date Range screen appears.

GSwAPVR ENTER CDR Customer Conference		4/04/13 12:10:23	
Velocity By Date Range			
Beg Corp. #	_____	** O R **	Beg Cust. # _____
End Corp. #	_____	** O R **	End Cust. # _____
			Salesman _____
			Cust. Collection _____
Account Type	_____	Print Cust/Item Velocity?	<u>Y</u>
Warehouse . . .	<u>1</u>	Print Cust/Class *OR*	
Beg Sales Class	<u>00001</u>	Print Cust/Group Summary?	<u>C</u> (C,G)
End Sales Class	<u>99999</u>	Print Corp/Class Summary?	<u>Y</u>
Item Collection:	_____	Print Acct. Type/Item *OR*	
Vendor Number .	_____	Print Corp/Item Summary?	<u>C</u> (A,C)
Start Date . . .	_____	Print Item Summary?	_____ (Y,N,Blank)
End Date	_____	Print Item/Cust Summary?	_____ (Y,N,Blank)
Print Item/UPC	<u>1</u> (? For Values)	U/M For Price .	<u>SSU</u> (SSU, EA.)
Rank Option . .	<u>R</u> (? For Values)	Job Queue	<u>BOOK</u>
Item Sort Option	<u>1</u> (? For Values)	Output To PDF?	_____ (Y,N,Blank)
Version	<u>1</u> (? For Values)	Output To CSV?	_____ (Y,N,Blank)
Use Custom Cat?	_____ (Y,N,Blank)		
F2=Load Sel. F3=Exit F4=Search F6=Print F7=Toggle Class F10=Save Sel.			

Refer to Saving and Loading Velocity Report Selection Criteria below for information about using the F2 (Load Sel) function key to select a previously saved criteria for printing a velocity report.

4. To print velocity reports (or summary reports) for corporate customers, enter customer corporate numbers for the **Beg Corp. #** and **End Corp. #** (6,n) fields. If necessary, press <F4> to select customer corporate numbers from the Select Corporate Master screen. Note: Numbers consisting of less than six digits must be entered with preceding zeros. For example, *010100* must be entered to designate the number 10100.
5. To print velocity reports (or summary reports) for a range of customers, enter customer numbers for the **Beg Cust. #** and **End Cust. #** (6,n) fields. If necessary, press <F4> to select customer numbers from the Select Customer Master screen. Note: Numbers consisting of less than six digits must be entered with preceding zeros. For example, *010100* must be entered to designate the number 10100.
6. To print velocity reports for the customer accounts of a particular sales representative, enter data for the following:
 - **Salesman** (6,a) field - the employee code of the sales representative assigned to the customer accounts. A value should be entered for the **Salesman** field to print version 3 of the report (see **Version** below).
If necessary, press <F4> to select a code from the Select Employee Master screen.
 - **End Corp. #** or **End Cust. #** field - enter *999999* for one of these fields.
7. To print velocity reports (or item summary reports) for a group of customers, enter a customer collection number for the **Cust. Collection** (6,n) field. If necessary, press <F4> to select or create a collection. Refer to Working With Customer Collections above, beginning with step 3, for additional instructions.
8. To print velocity reports (or item summary reports) for a group of customers based on account type, enter data for the following:
 - **Account Type** (4,a) field - the account type code of the desired group of

customers. A value should be entered for the **Account Type** field to print an item summary report for corporate customers grouped by account type (see **Print Acct. Type/Item *OR* Print Corp/Item Summary?** below). If necessary, press <F4> to select a type code from the Select Account Type screen.

- **End Corp. #** or **End Cust. #** field - enter 999999 for one of these fields.

```

GSWAPVR  ENTER  CDR Customer Conference 4/04/13 12:10:23
Velocity By Date Range

Beg Corp. # _____ ** O R ** Beg Cust. # _____ ** O R ** Salesman _____
End Corp. # _____ End Cust. # _____ Cust. Collection _____

Account Type . Print Cust/Item Velocity? Y
Warehouse . . . 1 Print Cust/Class *OR*
Beg Sales Class 00001 Print Cust/Group Summary? C (C,G)
End Sales Class 99999
Item Collection: Print Corp/Class Summary? Y
Vendor Number . Print Acct. Type/Item *OR*
Start Date . . . Print Corp/Item Summary? C (A,C)
End Date . . . Print Item Summary? . . (Y,N,Blank)
Print Item/UPC 1 (? For Values) Print Item/Cust Summary? - (Y,N,Blank)
Rank Option . . R (? For Values)
Item Sort Option 1 (? For Values) U/M For Price . SSU (SSU, EA.)
Version . . . . 1 (? For Values) Job Queue . . . BOOK
Use Custom Cat? - (Y,N,Blank) Output To PDF? - (Y,N,Blank)
Output To CSV? - (Y,N,Blank)

F2=Load Sel. F3=Exit F4=Search F6=Print F7=Toggle Class F10=Save Sel.

```

9. Enter a warehouse code for the **Warehouse** (6,a) field to restrict the items included in the velocity reports to a designated warehouse. If necessary, press <F4> to select a warehouse code from the Select Warehouse Master screen.
10. Press <F7> (Toggle Class) as necessary before entering data for one of the following to restrict the items as described for each criteria, and continue with step 12.
 - **Beg Sales Class** and **End Sales Class** (5,n) fields - a sales class number. If necessary, press <F4> to select a number from the Select Sales Class Master screen.
 - **Beg Prod. Class** and **End Prod. Class** (5,n) fields - a product class number. If necessary, press <F4> to select a number from the Select Product Class screen.
 - **Beg Category** and **End Category** (2,n) fields - an item category number. If necessary, press <F4> to select a number from the Select Item Category Master screen.
11. Enter data for one of the following to restrict the items included in the reports:
 - **Item Collection** (5,n) field - an item collection number. If necessary, press <F4> to select a number from the Work With Item Collections screen.
 - **Vendor Number** (6,a) field - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
12. Enter a range of dates for the **Start Date** and **End Date** (6,n) fields to limit the item sales to the designated range.

GSWAPVR ENTER CDR Customer Conference		4/04/13 12:10:23	
Velocity By Date Range			
Beg Corp. # _____	** O R **	Beg Cust. # _____	** O R ** Salesman _____
End Corp. # _____		End Cust. # _____	Cust. Collection _____
Account Type . . . _____		Print Cust/Item Velocity? <u>Y</u>	
Warehouse <u>1</u>		Print Cust/Class *OR* _____	
Beg Sales Class <u>00001</u>		Print Cust/Group Summary? <u>C</u> (C,G)	
End Sales Class <u>99999</u>			
Item Collection: _____		Print Corp/Class Summary? <u>Y</u>	
Vendor Number . . _____		Print Acct. Type/Item *OR* _____	
Start Date _____		Print Corp/Item Summary? <u>C</u> (A,C)	
End Date _____		Print Item Summary? - (Y,N,Blank)	
Print Item/UPC <u>I</u> (? For Values)		Print Item/Cust Summary? - (Y,N,Blank)	
Rank Option <u>R</u> (? For Values)			
Item Sort Option <u>1</u> (? For Values)		U/M For Price <u>SSU</u> (SSU, EA.)	
Version <u>1</u> (? For Values)		Job Queue <u>BOOK</u>	
Use Custom Cat? . . - (Y,N,Blank)		Output To PDF? - (Y,N,Blank)	
		Output To CSV? - (Y,N,Blank)	
F2=Load Sel. F3=Exit F4=Search F6=Print F7=Toggle Class F10=Save Sel.			

13. Enter one of the following values for the **Print Item/UPC** (1,a) field to designate which is printed with the item description:
 - *I* - item number.
 - *U* - universal product code (UPC) number.

14. Enter one of the following values for the **Rank Option** (1,a) field to designate the method used to rank the items appearing on the report:
 - *R* - items are ranked according to the total item quantity purchased by the retailer.
 - *W* - items are ranked according to the total item quantity sold by the wholesaler.

The items' rank, which appears under the *Rank* column heading of the report, is not used to determine the order in which the items are printed on the report (see **Item Sort Option** below).

15. Enter one of the following values for the **Item Sort Option** (1,a) field to designate the order for printing the items within each class on the report:
 - *1* - profit amount which appears under the *Profit Dollars* column heading of the report.
 - *2* - quantity sold which appears under the *Whole Units* column heading of the report.
 - *3* - retail amount which appears under the *Retail Dollars* column heading of the report.

16. Enter one of the following values for the **Version** (1,a) field to designate by which fields the report breaks:
 - *1* - sales class or item category for each customer with totals for both.
 - *2* - first by vendor and second by sales class for each customer with totals for all three.
 - *3* - sales class for each customer of the salesman with totals for class and customer.

17. To print the items in order by the customer's (not the distributor's) category, enter *Y* (yes) for the **Use Custom Cat?** (1,a) field. After sorting by customer category, the items are sorted by item description in the spooled file.

Sales classes or item category numbers (not product class numbers) must be used to sort by customer category. Refer to Using Work With Customer/Item Flags of the Billing File Maintenance document for information about the **Customer's Category** field.

GSWAPVR ENTER CDR Customer Conference		4/05/13 8:07:20	
Velocity By Date Range			
Beg Corp. # _____	** O R **	Beg Cust. # _____	** O R ** Salesman _____
End Corp. # _____		End Cust. # _____	Cust. Collection _____
Account Type . . . _____		Print Cust/Item Velocity? <u>Y</u>	
Warehouse . . . <u>1</u>		Print Cust/Class *OR*	
Beg Sales Class <u>00001</u>		Print Cust/Group Summary? <u>C</u> (C,G)	
End Sales Class <u>99999</u>			
Item Collection: _____		Print Corp/Class Summary? <u>Y</u>	
Vendor Number . . . _____		Print Acct. Type/Item *OR*	
Start Date . . . _____		Print Corp/Item Summary? <u>C</u> (A,C)	
End Date . . . _____		Print Item Summary? . . . - (Y,N,Blank)	
Print Item/UPC <u>1</u> (? For Values)		Print Item/Cust Summary? - (Y,N,Blank)	
Rank Option . . . <u>R</u> (? For Values)		U/M For Price . . . <u>SSU</u> (SSU, EA.)	
Item Sort Option <u>1</u> (? For Values)		Job Queue . . . <u>BOOK</u>	
Version <u>1</u> (? For Values)		Output To PDF? - (Y,N,Blank)	
Use Custom Cat? - (Y,N,Blank)		Output To CSV? - (Y,N,Blank)	
F2=Load Sel. F3=Exit F4=Search F6=Print F7=Toggle Class F10=Save Sel.			

18. Enter *Y* (yes) for the **Print Cust/Item Velocity?** (1,a) field to print the velocity report; otherwise, enter *N* (no).
To print the velocity report by item category, not by sales class, the following values must also be entered:
 - *I* - for the **Version** field (see above).
 - *G* - for the **Print Cust/Class *OR* Print Cust/Group Summary?** field (see below).

19. Enter one of the following values for the **Print Cust/Class *OR* Print Cust/Group Summary?** (1,a) field to designate which summary report is printed with the velocity report:
 - *C* - Customer by sales class.
 - *G* - Customer by category.
 If the **Print Cust/Class *OR* Print Cust/Group Summary?** field is left blank, neither version of the summary report is printed.

20. Enter *Y* (yes) for the **Print Corp/Class Summary?** (1,a) field to print a summary report for corporate customers by sales class; otherwise, enter *N* (no). Values must be entered for the **Beg Corp. #** and **End Corp. #** fields to print this summary report.

21. Enter one of the following values for the **Print Acct. Type/Item *OR* Print Corp/Item Summary?** (1,a) field to designate which item summary report is printed for corporate customers by sales class:
 - *A* - Customers grouped by account type. A value should be entered for the **Account Type** field to print this summary report.
 - *C* - Corporate customers.
 If the **Print Acct. Type/Item *OR* Print Corp/Item Summary?** field is left blank, neither version of the item summary report is printed. Values must be entered for the **Beg Corp. #** and **End Corp. #** fields to print these item summary reports.

22. Enter Y (yes) for one of the following fields, if desired:
- **Print Item Summary?** (1,a) - to print a summary report for corporate customers by sales class or item category.
 - **Print Item/Cust Summary?** (1,a) - to print a summary report for individual customers by sales class or item category.

```

GSWAPVR  ENTER  CDR Customer Conference  4/05/13  8:07:20
Velocity By Date Range

Beg Corp. # _____ ** O R ** Beg Cust. # _____ ** O R ** Salesman _____
End Corp. # _____ End Cust. # _____ Cust. Collection _____

Account Type . _____ Print Cust/Item Velocity? Y
Warehouse . . . 1 Print Cust/Class *OR*
Beg Sales Class 00001 Print Cust/Group Summary? C (C,G)
End Sales Class 99999

Item Collection: _____ Print Corp/Class Summary? Y
Vendor Number . _____ Print Acct. Type/Item *OR*
Start Date . . . _____ Print Corp/Item Summary? C (A,C)
End Date . . . _____ Print Item Summary? . . (Y,N,Blank)
Print Item/UPC 1 (? For Values) Print Item/Cust Summary? - (Y,N,Blank)
Rank Option . . R (? For Values)
Item Sort Option 1 (? For Values)
Version . . . . 1 (? For Values)
Use Custom Cat? - (Y,N,Blank)

U/M For Price . SSU (SSU, EA.)
Job Queue . . . BOOK
Output To PDF? - (Y,N,Blank)
Output To CSV? - (Y,N,Blank)

F2=Load Sel. F3=Exit F4=Search F6=Print F7=Toggle Class F10=Save Sel.

```

23. Enter one of the following values for the **U/M For Price** (3,a) field to designate for which selling level the items' prices are printed in the report:
- *SSU* - the standard selling unit of measure
 - *EA* - the first selling level (**U/M1** field of item records).
24. If necessary, enter another job queue for the **Job Queue** (10,a) field.
25. If outbound email functionality is enabled on the distributor's system, enter Y (yes) for one of the following fields, if desired:
- **Output To PDF?** (1,a) - to automatically email the velocity and item summary reports as PDF file attachments to customers.
 - **Output To CSV?** (1,a) - to automatically email the velocity reports as CSV file attachments to customers.
- No reports are printed on the distributor's system when they are emailed, but the files that are sent as attachments will appear as documents in the CV1COM folder of the distributor's system.
26. Press <F6> (Print) to print or email the reports. Below are examples of the prompt screens that appear when the email is used.
27. Press <F3> to exit. The Special Customer Reports screen appears.

The Display PDF File Names prompt screen below appears when *Y* (yes) is entered for the **Output To PDF?** field of the Velocity By Date Range screen, and <F6> (Print) is selected.

```
HIX8PVR  ENTER  CDR Customer Conference          4/05/13  9:47:25
                                Display PDF File Names

The following PDF files will be created for your velocity report. You
may change the file names or leave them the same. Press ENTER to continue.

                                VA900200 - Velocity Report

                                VD900200 - Item/Cust Summary

                                Send As Email Attachment? Y (Y/N)

F3=Exit
```

The Display CSV File Names prompt screen below appears when *Y* (yes) is entered for the **Output To CSV?** field of the Velocity By Date Range screen, and <F6> (Print) is selected.

```
DMA8PVR  ENTER  CDR Customer Conference          4/05/13 11:10:55
                                Display CSV File Names

The following CSV files will be created for your velocity report. You
may change the file names or leave them the same. Press ENTER to continue.

                                VA900300 - Velocity Report

                                Send As Email Attachment? Y (Y/N)

F3=Exit
```

Saving and Loading Velocity Report Selection Criteria

Users have the option of saving the selection criteria used to print a velocity report in order to reprint the report in the future. The instructions below describe the use of the F10 (Save Sel) and F2 (Load Sel) function keys of the Velocity By Date Range screen, but the same functionality exists on the Prompt For Velocity Report screen for users who generate a report for a range of weeks.

```

G5WAPVR  ENTER  CDR Customer Conference  4/22/13 10:34:15
Velocity By Date Range

Beg Corp. # _____ ** O R ** Beg Cust. # 320033      ** O R ** Salesman _____
End Corp. # _____      End Cust. # 320033      Cust. Collection _____

Account Type . . . _____      Print Cust/Item Velocity?  Y
Warehouse . . . 1 _____      Print Cust/Class *OR*
Beg Sales Class 00100 _____      Print Cust/Group Summary? C (C,G)
End Sales Class 00101 _____
Item Collection: _____      Print Corp/Class Summary?  Y
Vendor Number . . _____      Print Acct. Type/Item *OR*
Start Date . . . 10113 _____      Print Corp/Item Summary?  C (A,C)
End Date . . . 33113 _____      Print Item Summary? . . . Y (Y,N,Blank)
Print Item/UPC 1 (? For Values)      Print Item/Cust Summary?  - (Y,N,Blank)
Rank Option . . . R (? For Values)
Item Sort Option 1 (? For Values)      U/M For Price . . . SSU (SSU, EA.)
Version . . . . 1 (? For Values)      Job Queue . . . . BOOK
Use Custom Cat? - (Y,N,Blank)      Output To PDF? . . . - (Y,N,Blank)
                                      Output To CSV? . . . - (Y,N,Blank)

F2=Load Sel.  F3=Exit  F4=Search  F6=Print  F7=Toggle Class  F10=Save Sel.
  
```

1. After entering all the desired values of the necessary fields on the Velocity By Date Range field, press <F10> (Save Sel.). The Add/Update Velocity Selection Description screen appears.
2. Enter a description of the criteria for the **Selection Desc:** field as illustrated below.

```

HIS7PVR  ENTER  CDR Customer Conference  4/22/13 10:51:30
Add/Update Velocity Selection Description

Type choices, press Enter.

Selection Desc: Kings Qtly with Item Summary

F3=Exit
  
```

3. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Velocity By Date Range screen appears with the *New Velocity Selection Created* message.

```

GSWAPVR  ENTER  CDR Customer Conference 4/22/13 10:34:15
Velocity By Date Range

Beg Corp. # _____ ** O R ** Beg Cust. # 320033 ** O R ** Salesman _____
End Corp. # _____ End Cust. # 320033 Cust. Collection _____

Account Type . _____ Print Cust/Item Velocity? Y
Warehouse . . . 1 Print Cust/Class *OR*
Beg Sales Class 00100 Print Cust/Group Summary? C (C,G)
End Sales Class 00101
Item Collection: _____ Print Corp/Class Summary? Y
Vendor Number . _____ Print Acct. Type/Item *OR*
Start Date . . . 10113 Print Corp/Item Summary? C (A,C)
End Date . . . 33113 Print Item Summary? . . Y (Y,N,Blank)
Print Item/UPC 1 (? For Values) Print Item/Cust Summary? - (Y,N,Blank)
Rank Option . . R (? For Values)
Item Sort Option 1 (? For Values) U/M For Price . SSU (SSU, EA.)
Version . . . 1 (? For Values) Job Queue . . . BOOK
Use Custom Cat? - (Y,N,Blank) Output To PDF? - (Y,N,Blank)
Output To CSV? - (Y,N,Blank)

F2=Load Sel. F3=Exit F4=Search F6=Print F7=Toggle Class F10=Save Sel.
New Velocity Selection Created.

```

The F2 (Load Sel) function key can be used to select a previously saved selection criteria from the Velocity Rpt Selection screen illustrated below.

```

HIS8DFR  DISPLAY CDR Customer Conference 4/22/13 11:09:05
Velocity Rpt Selection

VRS
Key
 8

Type options, press Enter.
X=Select D=Delete

? Sel # Description From To From To
- 8 Kings Qtly with Item Summary 1/01/13 3/31/13
- 9 MS Stop & Go Qtly 01 13

F3=Exit

```

The VRS Key field can be used to locate the desired selection criteria.

As illustrated above, selection criteria using a date range is listed with **From** and **To** dates including months, days and years, and those using a range of weeks include only the weeks.

Velocity Report - Version 1

CDR Customer Conference		V E L O C I T Y R E P O R T		JEANNINE BSKMPFF		4/05/13 12:26:49 Page 1		MS CUST # : 320033					
From: 01/01/13 To: 03/31/13		For -- KINGS GROCERY		BILOXI		39350 -							
Warehouse: 1 MAIN WAREHOUSE				319 CALLAVEL ST									
Item Number	Description	-Packed- Unit	Unit Price	Rank	Item %	Cumm %	Whole Units	Each Units	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pet.
111700	100 PREMIUM CIGARETTES	20PK	31.37	1	32.55	32.55	1503		47149.11	5.95	89428.50	42279.39	47.28
120200	KOOL MENT 100 MILD	20PK	31.37	2	28.23	60.78	1201		37675.37	6.19	74341.90	36666.53	49.32
100500	WINSTON 100 LIGHT	20PK	31.37	3	18.52	79.30	855		26821.35	5.95	50872.50	24051.15	47.28
108300	CAMEL FILTER 85 BOX	20PK	33.90	4	13.00	92.30	603		20441.70	6.19	37325.70	16884.00	45.23
118800	B&H MENT 100 LT.	20PK	33.43	5	7.49	99.79	253		8457.79	7.19	18190.70	9732.91	53.50
115401	VANTAGE MENT 100	20PK	27.76	6	1.88	101.67	151		4191.76	4.39	6628.90	2437.14	36.77
100058	PALL MALL 100 BOX	20PK	36.60	7	.03	101.70	3		109.80	9.98	149.70	39.90	26.65
100056	MARLBORO BLACK BOX 100 B2G42	20PK	43.38	8	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100055	VIRGINIA SLIMS MENTHOL 100	20PK	43.38	9	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100057	VIRGINIA SLIMS MENTHOL BOX 100	20PK	43.38	10	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100054	VIRGINIA SLIM SILVER BOX 100	20PK	43.38	11	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100053	VIRGINIA SLIM GOLD 120	20PK	43.38	12	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100052	VIRGINIA SLIM GOLD MEN 120	20PK	43.38	13	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100051	VIRGINIA SLIM GOLD MEN BOX 100	20PK	43.38	14	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100017	VIRGINIA SLIM GOLD BOX 100	20PK	43.38	15	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100014	MARLBORO RED LABEL BOX KING	20PK	41.60	16	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100011	MARLBORO GREEN MEN 72	20PK	41.60	17	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100012	MARLBORO GOLD MEN BOX 100	20PK	41.60	18	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100011	MARLBORO GOLD KING	20PK	41.60	19	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100009	MARLBORO GOLD BOX KING	20PK	41.60	20	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100015	MARLBORO BLUE MEN 72	20PK	41.60	21	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100013	MARLBORO BLUE MEN 72	20PK	41.60	22	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100010	MARLBORO BLUE MEN BOX 100	20PK	41.60	23	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100007	MARLBORO BLEND BOX 100 #54	20PK	41.60	24	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100006	MARLBORO BLEND BOX KING #54	20PK	41.60	25	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100005	MARLBORO BLEND BOX KING #27	20PK	41.60	26	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100027	MARLBORO BLACK SPEC BLEND BOX 100	20PK	41.60	27	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100024	MARLBORO BLACK SPEC BLEND BOX KING	20PK	41.60	28	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100026	MARLBORO BLACK SPEC BLEND BOX KING	20PK	41.60	29	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100028	MARLBORO BLACK MEN SPEC BLEND BX 100	20PK	41.60	30	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100001	MARLBORO BLEND BOX K/S SOFTPACK	20PK	31.60	31	.00	101.70	1		31.60	3.02	30.20	1.40-	4.64-
100031	MARLBORO VIRGINIA BLEND BOX KING	20PK	41.60	32	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100029	MARLBORO SPEC BLEND RED BOX KING	20PK	41.60	33	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100022	MARLBORO SILVER MENTHOL BOX KING	20PK	41.60	34	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100020	MARLBORO SILVER BOX 100	20PK	41.60	35	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100018	MARLBORO RED LABEL BOX 100	20PK	41.60	36	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100008	MARLBORO BLUE MEN BOX K/S	20PK	36.60	37	.00	101.70	2		73.20	3.53	70.60	2.60-	3.68-
100004	MARLBORO BLACK MEN BOX 100	20PK	41.60	38	.00	101.70	3		124.80	4.03	120.90	3.90-	3.23-
100032	MARLBORO VIRGINIA BLEND BOX 100	20PK	41.60	39	.00	101.70	3		124.80	4.03	120.90	3.90-	3.23-

Velocity Report - Version 1 (continued)

CDR Customer Conference		V E L O C I T Y R E P O R T		JEANNINE BSKMPFR		4/05/13 12:26:49 Page 2		MS		Cust #: 320033			
From: 01/01/13 To: 03/31/13		For -- KINGS GROCERY		BILOXI		319 CALLAVEL ST		39350 -					
Warehouse: 1 MAIN WAREHOUSE													
Item Number	Description	-Packed- Unit	Unit Price	Rank	Item %	Cumm %	Wholesale Units	Each Units	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
100030	MARLBORO SPEC BLEND RED BOX 100	20PK	41.60	39	.00	101.70	3	124.80	124.80	4.03	120.90	3.90-	3.23-
100023	MARLBORO SILVER MENTHOL BOX 100	20PK	41.60	40	.00	101.70	3	124.80	124.80	4.03	120.90	3.90-	3.23-
100021	MARLBORO SILVER BOX 72	20PK	41.60	41	.00	101.70	3	124.80	124.80	4.03	120.90	3.90-	3.23-
100019	MARLBORO SILVER BOX KING	20PK	41.60	42	.00	101.70	3	124.80	124.80	4.03	120.90	3.90-	3.23-
100003	MARLBORO BLACK BOX 100	20PK	36.60	43	.00	101.70	3	109.80	109.80	3.53	105.90	3.90-	3.68-
100002	MARLBORO BLACK BOX K/S SOFTPACK	20PK	36.60	44	.00	101.70	3	109.80	109.80	3.53	105.90	3.90-	3.68-
113200	MARLBORO GOLD BOX 100	20PK	41.60	45	.20	101.50	271	11179.10	11179.10	4.03	10921.30	257.80-	2.36-
100016	MARLBORO GOLD 100	20PK	41.60	46	.60	100.90	601	25001.60	25001.60	4.03	24220.30	781.30-	3.23-
119526	VIRGINIA SLIM SILVER MEN BOX 100	20PK	43.38	47	.83	100.07	841	36482.58	36482.58	4.21	35406.10	1076.48-	3.04-
*** Class Totals ***									219885.42		349785.50	129900.08	
131200	101 DISCOUNT CIGARETTES						6340		46675.50	3.69	93098.70	46423.20	49.86
125800	BEST VALUE MENT 100 LT	20PK	18.50	1	29.30	29.30	2523		55547.76	4.39	87843.90	32296.14	36.77
131761	DORAL FF MENT 100	20PK	27.76	2	20.39	49.69	2001		43271.37	4.99	74999.70	31728.33	42.30
130585	BASIC FF 100 BOX	20PK	28.79	3	20.03	69.72	1503		32722.95	3.59	52234.50	19511.55	37.35
101300	GPC 100 ULTRA BOX	20PK	22.49	4	12.32	82.04	1455		30153.60	4.99	43113.60	12960.00	30.06
102811	CARLTON MENTHOL	20PK	34.90	5	8.18	90.22	864		13851.27	3.19	24977.70	11126.43	44.55
102815	LIGGETT SELECT FF MENTH BOX 100	20PK	17.69	6	7.02	97.24	783		5873.08	3.19	10590.80	4717.72	44.55
100039	LIGGETT SELECT ULTRA 100 BX	20PK	17.69	7	2.98	100.22	332		117.00	3.77	113.10	3.90-	3.45-
100038	BASIC GOLD MENTHOL BOX 100	20PK	39.00	8	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100037	BASIC GOLD MENTHOL BOX KING	20PK	39.00	9	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100036	BASIC GOLD BOX 100	20PK	39.00	10	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100035	BASIC GOLD BOX KING	20PK	39.00	11	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100034	BASIC BLUE 100	20PK	39.00	12	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100033	BASIC BLUE BOX 100	20PK	39.00	13	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100048	BASIC BLUE BOX KING	20PK	39.00	14	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100046	MERIT SILVER MENTHOL K/S	20PK	50.54	15	.02	100.18	2		101.08	3.77	75.40	25.68-	34.06-
100044	MERIT GOLD MENTHOL 100	20PK	50.54	16	.02	100.18	2		101.08	3.77	75.40	25.68-	34.06-
100042	MERIT BRONZE BOX 100	20PK	50.54	17	.02	100.16	2		101.08	3.77	75.40	25.68-	34.06-
100040	MERIT BLUE 100	20PK	50.54	18	.02	100.14	2		101.08	3.77	75.40	25.68-	34.06-
100049	MERIT BLUE BOX KING	20PK	50.54	19	.02	100.12	2		101.08	3.77	75.40	25.68-	34.06-
100047	MERIT SILVER MENTHOL 100	20PK	50.54	20	.02	100.10	3		151.62	3.77	113.10	38.52-	34.06-
100045	MERIT GOLD 100	20PK	50.54	21	.02	100.08	3		151.62	3.77	113.10	38.52-	34.06-
100043	MERIT GOLD BOX KING	20PK	50.54	22	.02	100.06	3		151.62	3.77	113.10	38.52-	34.06-
100041	MERIT BRONZE BOX KING	20PK	50.54	23	.02	100.04	3		151.62	3.77	113.10	38.52-	34.06-
	MERIT BLUE BOX 100	20PK	50.54	24	.02	100.02	3		151.62	3.77	113.10	38.52-	34.06-
*** Class Totals ***									230178.03		388593.10	158415.07	
*** Customer Totals ***									450063.45		738378.60	288315.15	

Velocity Report - Version 2

CDR Customer Conference		V E L O C I T Y R E P O R T		JEANNINE GSKKFFR		4/05/13 14:10:12		Page 1		MS		Cust #: 320033			
From: 01/01/13 To: 03/31/13		For -- KINGS GROCERY		BILOXI											
Warehouse: 1 MAIN WAREHOUSE															
Item Number	Description	-Packed- Unit	Unit Price	Unit Rank	Whole Units	Each Units	W Units	E Units	Last Yr	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.	
Vendor LIG001 LIGGETT & MEYERS TOBACCO															
102811	Class 101 DISCOUNT CIGARETTES	20PK	17.69	1	783					13851.27	3.19	24977.70	11126.43	44.55	
102815	LIGGETT SELECT FF MENTH BOX 100	20PK	17.69	2	332					5873.08	3.19	10590.80	4717.72	44.55	
	LIGGETT SELECT ULTRA 100 BX									19724.35		35568.50	15844.15		
		*** Class Totals ***													
		*** Vendor Totals ***													
Vendor PHI001 PHILLIP MORRIS INC.															
108300	Class 100 PREMIUM CIGARETTES	20PK	33.90	1	603					20441.70	6.19	37325.70	16884.00	45.23	
100558	B&H MENT 100 LT.	20PK	36.60	2	3					109.80	9.98	149.70	39.90	26.65	
100556	MARLBORO BLACK BOX 100 B2G\$2	20PK	43.38	3	1					43.38	4.21	42.10	1.28	3.04	
100056	VIRGINIA SLIMS MENTHOL 100	20PK	43.38	4	1					43.38	4.21	42.10	1.28	3.04	
100057	VIRGINIA SLIMS MENTHOL BOX 100	20PK	43.38	5	1					43.38	4.21	42.10	1.28	3.04	
100054	VIRGINIA SLIM SILVER BOX 100	20PK	43.38	6	1					43.38	4.21	42.10	1.28	3.04	
100054	VIRGINIA SLIM GOLD 120	20PK	43.38	7	1					43.38	4.21	42.10	1.28	3.04	
100053	VIRGINIA SLIM GOLD MEN 120	20PK	43.38	8	1					43.38	4.21	42.10	1.28	3.04	
100052	VIRGINIA SLIM GOLD MEN BOX 100	20PK	43.38	9	1					43.38	4.21	42.10	1.28	3.04	
100051	VIRGINIA SLIM GOLD BOX 100	20PK	41.60	10	1					41.60	4.03	40.30	1.30	3.23	
100017	MARLBORO RED LABEL BOX KING	20PK	41.60	11	1					41.60	4.03	40.30	1.30	3.23	
100014	MARLBORO GREEN MEN 72	20PK	41.60	12	1					41.60	4.03	40.30	1.30	3.23	
100012	MARLBORO GOLD MEN BOX 100	20PK	41.60	13	1					41.60	4.03	40.30	1.30	3.23	
100011	MARLBORO GOLD KING	20PK	41.60	14	1					41.60	4.03	40.30	1.30	3.23	
100009	MARLBORO GOLD BOX KING	20PK	41.60	15	1					41.60	4.03	40.30	1.30	3.23	
100015	MARLBORO BLUE MEN 72	20PK	41.60	16	1					41.60	4.03	40.30	1.30	3.23	
100013	MARLBORO BLUE MEN 72	20PK	41.60	17	1					41.60	4.03	40.30	1.30	3.23	
100010	MARLBORO BLUE MEN BOX 100	20PK	41.60	18	1					41.60	4.03	40.30	1.30	3.23	
100007	MARLBORO BLEND BOX 100 #54	20PK	41.60	19	1					41.60	4.03	40.30	1.30	3.23	
100006	MARLBORO BLEND BOX KING #54	20PK	41.60	20	1					41.60	4.03	40.30	1.30	3.23	
100005	MARLBORO BLEND BOX KING #27	20PK	41.60	21	1					41.60	4.03	40.30	1.30	3.23	
100027	MARLBORO BLACK SPEC BLEND BOX 100	20PK	41.60	22	1					41.60	4.03	40.30	1.30	3.23	
100024	MARLBORO BLACK SPEC BLEND BOX KING	20PK	41.60	23	1					41.60	4.03	40.30	1.30	3.23	
100026	MARLBORO BLACK MEN SPEC BLEND BX KS	20PK	41.60	24	1					41.60	4.03	40.30	1.30	3.23	
100028	MARLBORO BLACK MEN SPEC BLEND B 100	20PK	41.60	25	1					41.60	4.03	40.30	1.30	3.23	
100001	MARLBORO BLEND BOX K/S SOFTPACK	20PK	31.60	26	2					83.20	3.02	30.20	1.40	4.64	
100031	MARLBORO VIRGINIA BLEND BOX KING	20PK	41.60	27	2					83.20	4.03	80.60	2.60	3.23	
100029	MARLBORO SPEC BLEND RED BOX KING	20PK	41.60	28	2					83.20	4.03	80.60	2.60	3.23	
100022	MARLBORO SPEC BLEND MENTHOL BOX KING	20PK	41.60	29	2					83.20	4.03	80.60	2.60	3.23	
100020	MARLBORO SILVER MENTHOL BOX 100	20PK	41.60	30	2					83.20	4.03	80.60	2.60	3.23	

Velocity Report - Version 2 (continued)

CDR Customer Conference V E L O C I T Y R E P O R T JEANNINE GSKKPPF 4/05/13 14:10:12 Page 2 MS Cust #: 320033
 From: 01/01/13 To: 03/31/13 For -- KINGS GROCERY BILOXI
 Warehouse: 1 MAIN WAREHOUSE

Item Number	Description	-Packed- Unit	Unit Rank Price	Whole Units	Each Units	W Units Last Yr	E Units Last Yr	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pot.
100018	MARLBORO RED LABEL BOX 100	20PK CTN	41.60 30	2				83.20	4.03	80.60	2.60-	3.23-
100008	MARLBORO BLUE MEN BOX K/S	20PK CTN	41.60 31	2				83.20	4.03	80.60	2.60-	3.23-
100004	MARLBORO BLACK MEN BOX 100	20PK CTN	36.60 32	2				73.20	3.53	70.60	2.60-	3.68-
100032	MARLBORO VIRGINIA BLEND BOX 100	20PK CTN	41.60 33	3				124.80	4.03	120.90	3.90-	3.23-
100030	MARLBORO SPEC BLEND RED BOX 100	20PK CTN	41.60 34	3				124.80	4.03	120.90	3.90-	3.23-
100023	MARLBORO SILVER MENTHOL BOX 100	20PK CTN	41.60 35	3				124.80	4.03	120.90	3.90-	3.23-
100021	MARLBORO SILVER BOX 72	20PK CTN	41.60 36	3				124.80	4.03	120.90	3.90-	3.23-
100019	MARLBORO SILVER BOX KING	20PK CTN	41.60 37	3				124.80	4.03	120.90	3.90-	3.23-
100003	MARLBORO BLACK BOX 100	20PK CTN	36.60 38	3				109.80	3.53	105.90	3.90-	3.68-
100002	MARLBORO BLACK BOX K/S SOFTPACK	20PK CTN	36.60 39	3				109.80	3.53	105.90	3.90-	3.68-
113200	MARLBORO GOLD BOX 100	20PK CTN	41.60 40	271				11179.10	4.03	10921.30	257.80-	2.36-
100016	MARLBORO GOLD 100	20PK CTN	41.60 41	601				25001.60	4.03	24220.30	781.30-	3.23-
119526	VIRGINIA SLIM SILVER MEN BOX 100	20PK CTN	43.38 42	841				36482.58	4.21	35406.10	1076.48-	3.04-
*** Class Totals ***												
2377 95590.04 110323.00 14732.96												

Class	Description	-Packed- Unit	Unit Rank Price	Whole Units	Each Units	W Units Last Yr	E Units Last Yr	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pot.
101	DISCOUNT CIGARETTES											
131761	BASIC FF 100 BOX	20PK CTN	28.79 1	1503				43271.37	4.99	74999.70	31728.33	42.30
100039	BASIC GOLD MENTHOL BOX 100	20PK CTN	39.00 2	3				117.00	3.77	113.10	3.90-	3.45-
100038	BASIC GOLD MENTHOL BOX KING	20PK CTN	39.00 3	3				117.00	3.77	113.10	3.90-	3.45-
100037	BASIC GOLD BOX 100	20PK CTN	39.00 4	3				117.00	3.77	113.10	3.90-	3.45-
100036	BASIC GOLD BOX KING	20PK CTN	39.00 5	3				117.00	3.77	113.10	3.90-	3.45-
100035	BASIC BLUE 100	20PK CTN	39.00 6	3				117.00	3.77	113.10	3.90-	3.45-
100034	BASIC BLUE BOX 100	20PK CTN	39.00 7	3				117.00	3.77	113.10	3.90-	3.45-
100033	BASIC BLUE BOX KING	20PK CTN	39.00 8	3				117.00	3.77	113.10	3.90-	3.45-
100048	MERIT SILVER MENTHOL K/S	20PK CTN	50.54 9	2				101.08	3.77	75.40	25.68-	34.06-
100046	MERIT GOLD MENTHOL 100	20PK CTN	50.54 10	2				101.08	3.77	75.40	25.68-	34.06-
100044	MERIT BRONZE BOX 100	20PK CTN	50.54 11	2				101.08	3.77	75.40	25.68-	34.06-
100042	MERIT BLUE 100	20PK CTN	50.54 12	2				101.08	3.77	75.40	25.68-	34.06-
100040	MERIT BLUE BOX KING	20PK CTN	50.54 13	2				101.08	3.77	75.40	25.68-	34.06-
100049	MERIT SILVER MENTHOL 100	20PK CTN	50.54 14	3				151.62	3.77	113.10	38.52-	34.06-
100047	MERIT GOLD 100	20PK CTN	50.54 15	3				151.62	3.77	113.10	38.52-	34.06-
100045	MERIT GOLD BOX KING	20PK CTN	50.54 16	3				151.62	3.77	113.10	38.52-	34.06-
100043	MERIT BRONZE BOX KING	20PK CTN	50.54 17	3				151.62	3.77	113.10	38.52-	34.06-
100041	MERIT BLUE BOX 100	20PK CTN	50.54 18	3				151.62	3.77	113.10	38.52-	34.06-
*** Class Totals ***												
1549 45353.87 76733.90 31380.03												

*** Vendor Totals *** 140943.91 187056.90 46112.99

Velocity Report - Version 2 (continued)

CDR Customer Conference		V E L O C I T Y R E P O R T		JEANNINE GSKKPPR		4/05/13 14:10:12 Page 3		MS		Cust #: 320033				
From: 01/01/13 To: 03/31/13		For -- KINGS GROCERY		BILOXI										
Warehouse: 1 MAIN WAREHOUSE														
Item Number	Description	-Packed- Unit	Unit Price	Rank	Whole Units	Each Units	W Units	E Units	Last Yr	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
Vendor RJR100 R.J. REYNOLDS TOBACCO INC.														
Class 100 PREMIUM CIGARETTES														
111700	KOOL MENT 100 MILD	20PK	31.37	1	1503					47149.11	5.95	89428.50	42279.39	47.28
120200	WINSTON 100 LIGHT	20PK	31.37	2	1201					37675.37	6.19	74341.90	36666.53	49.32
100500	CAMEL FILTER 85 BOX	20PK	31.37	3	855					26821.35	5.95	50872.50	24051.15	47.28
118800	VANTAGE MENT 100	20PK	33.43	4	253					8457.79	7.19	18190.70	9732.91	53.50
115401	PALL MALL 100 BOX	20PK	27.76	5	151					4191.76	4.39	6628.90	2437.14	36.77
*** Class Totals ***										124295.38		239462.50	115167.12	
Class 101 DISCOUNT CIGARETTES														
131200	BEST VALUE MENT 100 LT	20PK	18.50	1	2523					46675.50	3.69	93098.70	46423.20	49.86
125800	DORAL FF MENT 100	20PK	27.76	2	2001					55547.76	4.39	87843.90	32296.14	36.77
130585	GPC 100 ULTRA BOX	20PK	22.49	3	1455					32722.95	3.59	52234.50	19511.55	37.35
101300	CARLTON MENTHOL	20PK	34.90	4	864					30153.60	4.99	43113.60	12960.00	30.06
*** Class Totals ***										165099.81		276290.70	111190.89	
*** Vendor Totals ***										289395.19		515753.20	226358.01	
*** Customer Totals ***										450063.45		738378.60	288315.15	

Velocity Report - Version 2 (continued)

CDR Customer Conference		VELOCITY	REPORT	JEANNINE	GSKKPF	4/05/13 14:10:12	Page	4
From: 01/01/13 To: 03/31/13		(Customer Vendor/Class Summary)		For -- KINGS GROCERY		BILOXI	MS	Cust: 320033
Class	Description	Purchases	% Of Total	Retail				
Vendor LIG001	LIGGETT & MEYERS TOBACCO							
Class	101 DISCOUNT CIGARETTES	19724.35	4.38	35568.50				
*** Vendor Totals ***		19724.35	4.38	35568.50				
Vendor PHI001	PHILLIP MORRIS INC.							
Class	100 PREMIUM CIGARETTES	95590.04	21.24	110323.00				
Class	101 DISCOUNT CIGARETTES	45353.87	10.08	76733.90				
*** Vendor Totals ***		140943.91	31.32	187056.90				
Vendor RJR100	R.J. REYNOLDS TOBACCO INC.							
Class	100 PREMIUM CIGARETTES	124295.38	27.62	239462.50				
Class	101 DISCOUNT CIGARETTES	165099.81	36.68	276290.70				
*** Vendor Totals ***		289395.19	64.30	515753.20				
*** Final totals ***		450,063.45		738,378.60				
** END OF REPORT **								

Velocity Report - Version 3

CDR Customer Conference V E L O C I T Y R E P O R T JEANNINE GSWBPF 4/05/13 16:27:51 Page 1
 Salesman: 20 JOE BADEAUX
 From: 01/01/13 To: 03/31/13 For -- B & D FOOD STORE Cust #: 771230
 Warehouse: 1 MAIN WAREHOUSE

Class	Description	-Packed-	Unit	Unit Price	Unit Rank	Item %	Cumm %	Whole Units	Each Units	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
100017	100 PREMIUM CIGARETTES		CTN	53.90	1	.03		2		107.80	12.55	251.00	143.20	57.05
100014	MARLBORO RED LABEL BOX KING	20PK	CTN	53.90	2	.03	.06	2		107.80	12.55	251.00	143.20	57.05
100012	MARLBORO GREEN MEN 72	20PK	CTN	53.90	3	.03	.12	2		107.80	12.55	251.00	143.20	57.05
100011	MARLBORO GOLD MEN BOX 100	20PK	CTN	53.90	4	.03	.12	2		107.80	12.55	251.00	143.20	57.05
100009	MARLBORO GOLD KING	20PK	CTN	53.90	5	.03	.15	2		107.80	12.55	251.00	143.20	57.05
100015	MARLBORO GOLD BOX KING	20PK	CTN	53.90	6	.03	.18	2		107.80	12.55	251.00	143.20	57.05
100019	MARLBORO BLUE MEN 72	20PK	CTN	53.90	7	.03	.21	2		107.80	12.55	251.00	143.20	57.05
100013	MARLBORO BLUE MEN 72	20PK	CTN	53.90	8	.03	.24	2		107.80	12.55	251.00	143.20	57.05
100010	MARLBORO BLUE MEN BOX 100	20PK	CTN	53.90	9	.04	.28	3		146.70	22.75	341.25	194.55	57.01
100058	MARLBORO BLACK BOX 100 BZG\$2	20PK	CTN	48.90	10	.04	.32	3		146.70	11.39	341.70	195.00	57.07
100003	MARLBORO BLACK BOX 100	20PK	CTN	48.90	11	.04	.36	3		146.70	11.39	341.70	195.00	57.07
100002	MARLBORO BLACK BOX K/S SOFTPACK	20PK	CTN	48.90	12	.04	.40	3		161.70	12.55	376.50	214.80	57.05
100006	MARLBORO BLEND BOX KING #54	20PK	CTN	53.90	13	.04	.44	3		161.70	12.55	376.50	214.80	57.05
100005	MARLBORO BLEND BOX KING #27	20PK	CTN	53.90	14	.04	.48	3		161.70	12.55	376.50	214.80	57.05
100024	MARLBORO BLACK SPEC BLEND BOX KING	20PK	CTN	53.90	15	.04	.52	3		161.70	12.55	376.50	214.80	57.05
100026	MARLBORO BLACK MEN SPEC BLEND BX KS 20PK	20PK	CTN	53.90	16	.04	.56	3		161.70	12.55	376.50	214.80	57.05
100028	MARLBORO BLACK MEN SPEC BLEND B 100 20PK	20PK	CTN	53.90	17	.04	.60	3		167.04	12.95	388.50	221.46	57.00
100057	VIRGINIA SLIM SILVER BOX 100	20PK	CTN	55.68	18	.04	.64	3		167.04	12.95	388.50	221.46	57.00
100054	VIRGINIA SLIM GOLD 120	20PK	CTN	55.68	19	.04	.68	3		167.04	12.95	388.50	221.46	57.00
100053	VIRGINIA SLIM GOLD MEN 120	20PK	CTN	55.68	20	.04	.72	3		167.04	12.95	388.50	221.46	57.00
100052	VIRGINIA SLIM GOLD MEN BOX 100	20PK	CTN	55.68	21	.04	.76	3		167.04	12.95	388.50	221.46	57.00
100051	VIRGINIA SLIM GOLD BOX 100	20PK	CTN	55.68	22	.06	.82	5		219.50	10.25	512.50	293.00	57.17
100001	MARLBORO BLEND BOX K/S SOFTPACK	20PK	CTN	43.90	23	.06	.88	5		244.50	11.39	569.50	325.00	57.07
100004	MARLBORO BLACK MEN BOX 100	20PK	CTN	48.90	24	.07	.95	5		278.40	12.95	647.50	369.10	57.00
100056	VIRGINIA SLIMS MENTHOL 100	20PK	CTN	55.68	25	.07	1.02	5		278.40	12.95	647.50	369.10	57.00
100055	VIRGINIA SLIMS MENTHOL BOX 100	20PK	CTN	55.68	26	.08	1.10	6		323.40	12.55	753.00	429.60	57.05
100020	MARLBORO SILVER BOX 100	20PK	CTN	53.90	27	.08	1.18	6		323.40	12.55	753.00	429.60	57.05
100018	MARLBORO RED LABEL BOX 100	20PK	CTN	53.90	28	.08	1.26	6		323.40	12.55	753.00	429.60	57.05
100007	MARLBORO BLEND BOX 100 #54	20PK	CTN	53.90	29	.08	1.34	6		323.40	12.55	753.00	429.60	57.05
100008	MARLBORO BLUE MEN BOX K/S	20PK	CTN	53.90	30	.10	1.44	7		377.30	12.55	878.50	501.20	57.05
100027	MARLBORO BLACK SPEC BLEND BOX 100	20PK	CTN	53.90	31	.11	1.55	8		431.20	12.55	1004.00	572.80	57.05
100032	MARLBORO VIRGINIA BLEND BOX 100	20PK	CTN	53.90	32	.11	1.66	8		431.20	12.55	1004.00	572.80	57.05
100031	MARLBORO VIRGINIA BLEND BOX KING	20PK	CTN	53.90	33	.12	1.78	9		485.10	12.55	1129.50	644.40	57.05
100029	MARLBORO SPEC BLEND RED BOX KING	20PK	CTN	53.90	34	.12	1.90	9		485.10	12.55	1129.50	644.40	57.05
100022	MARLBORO SILVER MENTHOL BOX KING	20PK	CTN	53.90	35	.12	2.02	9		485.10	12.55	1129.50	644.40	57.05
100021	MARLBORO SILVER BOX 72	20PK	CTN	53.90	36	.12	2.14	9		485.10	12.55	1129.50	644.40	57.05
100019	MARLBORO SILVER BOX KING	20PK	CTN	53.90	36	.12	2.14	9		485.10	12.55	1129.50	644.40	57.05

Velocity Report - Version 3 (continued)

CDR Customer Conference		V E L O C I T Y R E P O R T		JEANNINE GSWBPF		4/05/13 16:27:51 Page 2		Cust #: 771230				
From: 01/01/13 To: 03/31/13		For -- B & D FOOD STORE		Warehouse: 1 MAIN WAREHOUSE								
Description	-Packed-	Unit	Price	Unit Rank	Item %	Cumm %	Whole Units	Each Units	Net Retail Dollars	Retail Dollars	Profit Dollars	Profit Pct.
100030	20PK	CTN	53.90	37	.15	2.29	11		592.90	1380.50	787.60	57.05
100023	20PK	CTN	53.90	38	.15	2.44	11		592.90	1380.50	787.60	57.05
108300	20PK	CTN	46.20	39	1.54	3.98	516		23839.20	31940.40	8101.20	25.36
115401	20PK	CTN	40.06	40	1.56	5.54	153		6129.18	14305.50	8176.32	57.16
100016	20PK	CTN	53.90	41	8.20	13.74	602		32447.80	75551.00	43103.20	57.05
100500	20PK	CTN	43.67	42	9.47	23.21	855		37337.85	87124.50	49786.65	57.14
119526	20PK	CTN	55.68	43	11.84	35.05	843		46938.24	109168.50	62230.26	57.00
113200	20PK	CTN	53.90	44	11.87	46.92	872		47000.80	109436.00	62435.20	57.05
120200	20PK	CTN	43.67	45	13.32	60.24	1203		52535.01	122585.70	70050.69	57.14
111700	20PK	CTN	43.67	46	16.65	76.89	1503		65636.01	153155.70	87519.69	57.14
118800	20PK	CTN	45.73	47	23.13	100.02	2001		91505.73	213106.50	121600.77	57.06
*** Class Totals ***							8728		412996.32	938785.95	525789.63	
Class 101 DISCOUNT CIGARETTES												
100037	20PK	CTN	51.30	1	.03	.03	2		102.60	147.00	44.40	30.20
100036	20PK	CTN	51.30	2	.04	.07	3		153.90	220.50	66.60	30.20
100035	20PK	CTN	51.30	3	.04	.11	3		153.90	220.50	66.60	30.20
100034	20PK	CTN	51.30	4	.04	.15	3		153.90	220.50	66.60	30.20
100039	20PK	CTN	51.30	5	.06	.21	5		256.50	367.50	111.00	30.20
100038	20PK	CTN	51.30	6	.06	.27	5		256.50	367.50	111.00	30.20
100048	20PK	CTN	62.84	7	.11	.38	7		439.88	629.30	189.42	30.10
100042	20PK	CTN	62.84	8	.11	.49	7		439.88	629.30	189.42	30.10
100040	20PK	CTN	62.84	9	.11	.60	7		439.88	629.30	189.42	30.10
100044	20PK	CTN	62.84	10	.12	.72	8		502.72	719.20	216.48	30.10
100046	20PK	CTN	62.84	11	.14	.86	9		565.56	809.10	243.54	30.10
100045	20PK	CTN	62.84	12	.14	1.00	9		565.56	809.10	243.54	30.10
100049	20PK	CTN	62.84	13	.15	1.15	10		628.40	899.00	270.60	30.10
100047	20PK	CTN	62.84	14	.15	1.30	10		628.40	899.00	270.60	30.10
100043	20PK	CTN	62.84	15	.15	1.45	10		628.40	899.00	270.60	30.10
100041	20PK	CTN	62.84	16	.15	1.60	10		628.40	899.00	270.60	30.10
100033	20PK	CTN	51.30	17	.18	1.78	14		718.20	1029.00	310.80	30.20
102811	20PK	CTN	29.99	18	5.70	7.48	783		23482.17	33590.70	10108.53	30.09
125800	20PK	CTN	40.06	19	5.93	13.41	603		24156.18	34672.50	10516.32	30.33
102815	20PK	CTN	29.99	20	10.81	24.22	1485		44535.15	63706.50	19171.35	30.09
130585	20PK	CTN	34.79	21	12.40	36.62	1455		50619.45	72604.50	21985.05	30.28
101300	20PK	CTN	47.20	22	20.66	57.28	1805		85196.00	121837.50	36641.50	30.07
131761	20PK	CTN	41.09	23	42.73	100.01	1503		61758.27	137524.50	75766.23	55.09
*** Class Totals ***							7756		297009.80	474330.00	177320.20	
*** Customer Totals ***							16484		710006.12	1413115.95	703109.83	

Velocity Report - Version 3 (continued)

CDR Customer Conference
 From: 01/01/13 To: 03/31/13
 V E L O C I T Y R E P O R T JEANNINE GSWBPF 4/05/13 16:27:51 Page 3
 (Customer By Class Summary)

Class	Description	Purchases	% Of Total	Retail	TX	Cust #
100	PREMIUM CIGARETTES	412996.32	58.17	938785.95		771230
101	DISCOUNT CIGARETTES	297009.80	41.83	474330.00		
Final totals				710,006.12	1,413,115.95	

Customer By Class Summary

(Value of *C* entered for **Print Cust/Class *OR* Print Cust/Group Summary?** field.)

CDR Customer Conference		V E L O C I T Y R E P O R T		JEANNINE	BSKMPFR	4/08/13 10:58:55	Page 1
(Customer By Class Summary)							
From: 01/01/13 To: 03/31/13		For -- B & D FOOD STORE		HOUSTON	TX	Cust #: 771230	
Class	Description	Purchases	% Of Total	Retail			
100	PREMIUM CIGARETTES	412996.32	52.78	938785.95			
101	DISCOUNT CIGARETTES	297009.80	37.96	474330.00			
200	CHEWING TOBACCO	4872.24	.62	5849.10			
201	SMOKING TOBACCO	41570.10	5.31	90478.08			
202	MOIST SNUFF	25800.00	3.30	4257.00			
300	CIGARS	185.97	.02	250.95			
Final totals		782,434.43		1,513,951.08			
** END OF REPORT **							

Corporate By Class Summary

(Value of *C* entered for **Print Cust/Class *OR* Print Cust/Group Summary?** field.)

CDR Customer Conference		V E L O C I T Y R E P O R T		JEANNINE	BSKMPFR	4/08/13 15:11:38	Page 13
(Corporate By Class Summary)							
From: 01/01/13 To: 03/31/13		For -- USA CONVENIENCE HEADQUARTERS		BATON ROUGE	LA	Corp #: 900100	
Class	Description	Purchases	% Of Total	Retail			
100	PREMIUM CIGARETTES	1880233.12	84.35	2711193.60			
200	CHEWING TOBACCO	16880.08	.76	1850.64			
201	SMOKING TOBACCO	144818.70	6.50	31066.20			
202	MOIST SNUFF	187175.84	8.40	35336.40			
300	CIGARS	14.59	.00	19.70			
Final totals		2,229,122.33		2,779,466.54			
** END OF REPORT **							

Customer By Category Summary

(Value of *G* entered for **Print Cust/Class *OR* Print Cust/Group Summary?** field.)

CDR Customer Conference		V E L O C I T Y R E P O R T		JEANNINE	BSKMPFR	4/08/13 12:09:36	Page 1
(Customer By Category Summary)							
From: 01/01/13 To: 03/31/13		For -- B & D FOOD STORE		HOUSTON	TX	Cust #: 771230	
Category	Description	Purchases	% Of Total	Retail			
1	CIGARETTES	710006.12	90.74	1413115.95			
2	TOBACCO	72242.34	9.23	100584.18			
3	CIGARS	185.97	.02	250.95			
Final totals		782,434.43		1,513,951.08			
** END OF REPORT **							

Velocity Item Summary

(Value of Y entered for Print Corp/Class Summary? and

C entered for Print Acct. Type/Item *OR* Print Corp/Item Summary? field.)

CDR Customer Conference		V E I O C I T Y (ITEM SUMMARY)		JEANNINE BSHFFR		4/08/13 12:29:58 Page 1		LA CORP. #		900100	
Description		-Packed- Unit Rank Item % Cumm %		BAPON ROUGE		Net Dollars		Retail Dollars		Profit Dollars	
Category	Description	Unit	Rank	Item %	Cumm %	Whole Units	Each Units	Net Dollars	Retail Dollars	Profit Dollars	Profit Pct.
111700	1 CIGARETTES	CTN	1	24.76	24.76	13114		461743.94	667502.60	205758.66	30.83
119526	KOOL MENT 100 MILD	20PK	2	14.21	38.97	5886		269814.24	387887.40	118073.16	30.44
120200	VIRGINIA SLIM SILVER MEN BOX 100	20PK	3	13.23	52.20	7007		246716.47	356656.30	109939.83	30.83
115401	WINSTON 100 LIGHT	CTN	4	12.73	64.93	7873		239811.58	345624.70	105813.12	30.62
113200	PALL MALL 100 BOX	CTN	5	9.59	74.52	4063		182267.08	261948.70	79681.62	30.42
100500	MARLBORO GOLD BOX 100	CTN	6	8.99	83.51	4989		164237.88	238973.10	74735.22	31.27
108300	CAMEL FILTER 85 BOX	CTN	7	7.80	91.31	4209		149419.50	214238.10	64818.60	30.26
100016	B&H MENT 100 LT.	CTN	8	5.32	96.63	2340		103006.80	147186.00	44179.20	30.02
118800	MARLBORO GOLD 100	CTN	9	2.94	99.57	1475		55061.75	79502.50	24440.75	30.74
100008	VANTAGE MENT 100	CTN	10	.03	99.60	12		528.24	754.80	226.56	30.02
100009	MARLBORO BLUE MEN BOX K/S	CTN	11	.03	99.63	12		528.24	754.80	226.56	30.02
100006	MARLBORO GOLD BOX KING	CTN	12	.02	99.65	10		440.20	629.00	188.80	30.02
100011	MARLBORO BLEND BOX KING #54	CTN	13	.02	99.67	9		396.18	566.10	169.92	30.02
100015	MARLBORO GOLD KING	CTN	14	.02	99.69	9		396.18	566.10	169.92	30.02
100011	MARLBORO BLUE MEN 72	CTN	15	.02	99.71	9		396.18	566.10	169.92	30.02
100024	MARLBORO BLACK SPEC BLEND BOX KING	CTN	16	.02	99.73	9		396.18	566.10	169.92	30.02
100028	MARLBORO BLEND BOX SPEC BLEND B 100	CTN	17	.02	99.75	11		370.92	537.90	166.98	31.04
100001	MARLBORO BLEND BOX K/S SOFTPACK	CTN	18	.02	99.77	8		352.16	503.20	151.04	30.02
100017	MARLBORO RED LABEL BOX KING	CTN	19	.02	99.79	7		320.88	461.30	140.42	30.44
100054	VIRGINIA SLIM GOLD 120	CTN	20	.02	99.81	8		312.64	447.20	134.56	30.09
100003	MARLBORO BLACK BOX 100	CTN	21	.01	99.82	6		275.04	395.40	120.36	30.44
100053	VIRGINIA SLIM GOLD MEN 120	CTN	22	.01	99.83	6		275.04	395.40	120.36	30.44
100055	VIRGINIA SLIMS MENTHOL BOX 100	CTN	23	.01	99.84	6		264.12	377.40	113.28	30.02
100014	MARLBORO GREEN MEN 72	CTN	24	.01	99.85	5		229.20	329.50	100.30	30.44
100051	VIRGINIA SLIM GOLD BOX 100	CTN	25	.01	99.86	5		229.20	329.50	100.30	30.44
100057	VIRGINIA SLIM SILVER BOX 100	CTN	26	.01	99.87	5		220.10	314.50	94.40	30.02
100010	MARLBORO BLUE MEN BOX 100	CTN	27	.01	99.88	4		183.36	263.60	80.24	30.44
100056	VIRGINIA SLIMS MENTHOL 100	CTN	28	.01	99.89	4		176.08	251.60	75.52	30.02
100017	MARLBORO BLEND BOX 100 #54	CTN	29	.01	99.90	4		176.08	251.60	75.52	30.02
100013	MARLBORO BLUE MEN 72	CTN	30	.01	99.91	4		176.08	251.60	75.52	30.02
100027	MARLBORO BLACK SPEC BLEND BOX 100	CTN	31	.01	99.92	4		156.32	223.60	67.28	30.09
100004	MARLBORO BLACK MEN BOX 100	CTN	32	.01	99.93	3		137.52	197.70	60.18	30.44
100052	VIRGINIA SLIM GOLD MEN BOX 100	CTN	33	.01	99.94	3		132.06	188.70	56.64	30.02
100012	MARLBORO GOLD MEN BOX 100	CTN	34	.01	99.95	3		132.06	188.70	56.64	30.02
100026	MARLBORO BLACK MEN SPEC BLEND BX KS	20PK	35	.01	99.96	3		117.24	167.70	50.46	30.09
100002	MARLBORO BLACK BOX K/S SOFTPACK	20PK	36	.00	99.96	2		88.04	125.80	37.76	30.02
100005	MARLBORO BLEND BOX KING #27	20PK	37	.00	99.96	2		88.04	125.80	37.76	30.02
100018	MARLBORO RED LABEL BOX 100	CTN	38	.00	99.96	2		88.04	125.80	37.76	30.02
100019	MARLBORO SILVER BOX KING	CTN	39	.00	99.96	2		88.04	125.80	37.76	30.02
100020	MARLBORO SILVER BOX 100	CTN	39	.00	99.96	2		88.04	125.80	37.76	30.02

Velocity Item Summary (continued)

CDR Customer Conference V E L O C I T Y (ITEM SUMMARY) JEANNINE BSLHPR 4/08/13 12:29:58 Page 2

From: 01/01/13 To: 03/31/13 For -- USA CONVENIENCE HEADQUARTERS RATON ROUGE Net IA CORP. # 900100

Description -Packed- Unit Rank Item % Cum % Whole Each Dollars Dollars Dollars Dollars Dollars Profit Profit

	Unit	Rank	Item %	Cumm %	Units	Units	Dollars	Dollars	Dollars	Dollars	Dollars	Dollars	Pct.
100021	MARLBORO SILVER BOX 72	40	.00	99.96	2	2	88.04	125.80	37.76	30.02	37.76	30.02	
100023	MARLBORO SILVER MENTHOL BOX 100	41	.00	99.96	2	2	88.04	125.80	37.76	30.02	37.76	30.02	
100030	MARLBORO SPEC BLEND RED BOX 100	42	.00	99.96	2	2	88.04	125.80	37.76	30.02	37.76	30.02	
100031	MARLBORO VIRGINIA BLEND BOX KING	43	.00	99.96	2	2	88.04	125.80	37.76	30.02	37.76	30.02	
100022	MARLBORO SILVER MENTHOL BOX KING	44	.00	99.96	1	1	44.02	62.90	18.88	30.02	18.88	30.02	
100029	MARLBORO SPEC BLEND RED BOX KING	45	.00	99.96	1	1	44.02	62.90	18.88	30.02	18.88	30.02	
100032	MARLBORO VIRGINIA BLEND BOX 100	46	.00	99.96	1	1	44.02	62.90	18.88	30.02	18.88	30.02	
*** Category Totals ***					51144		1880233.12	2711193.60	830960.48				
*** Corporate Totals ***					51144		1880233.12	2711193.60	830960.48				

Final totals
** END OF REPORT **

Velocity Summary By Item

(Value of Y entered for Print Item Summary? field.)

CDR Customer Conference		VELOCITY SUMMARY (BY ITEM)			JEANNINE	CVFZPFR	4/08/13 12:56:37		Page	1
From: 01/01/13 To: 03/31/13										
Item/UPC	Description	-Packed-	U/M	Whole Units	Each Units	Net Dollars	Retail Dollars	Profit Dollars	Profit Pct.	
Category 1 CIGARETTES										
108300	B&H MENT 100 LT.	20PK	CTN	516		23839.20	31940.40	8101.20	.25	
100033	BASIC BLUE BOX KING	20PK	CTN	14		718.20	1029.00	310.80	.30	
100034	BASIC BLUE BOX 100	20PK	CTN	3		153.90	220.50	66.60	.30	
100035	BASIC BLUE 100	20PK	CTN	3		153.90	220.50	66.60	.30	
131761	BASIC FF 100 BOX	20PK	CTN	1503		61758.27	137524.50	75766.23	.55	
100036	BASIC GOLD BOX KING	20PK	CTN	3		153.90	220.50	66.60	.30	
100037	BASIC GOLD BOX 100	20PK	CTN	2		102.60	147.00	44.40	.30	
100038	BASIC GOLD MENTHOL BOX KING	20PK	CTN	5		256.50	367.50	111.00	.30	
100039	BASIC GOLD MENTHOL BOX 100	20PK	CTN	5		256.50	367.50	111.00	.30	
100500	CAMEL FILTER 85 BOX	20PK	CTN	855		37337.85	87124.50	49786.65	.57	
101300	CARLTON MENTHOL	20PK	CTN	1805		85196.00	121837.50	36641.50	.30	
125800	DORAL FF MENT 100	20PK	CTN	603		24156.18	34672.50	10516.32	.30	
130585	GPC 100 ULTRA BOX	20PK	CTN	1455		50619.45	72604.50	21985.05	.30	
111700	KOOL MENT 100 MILD	20PK	CTN	1503		65636.01	153155.70	87519.69	.57	
102811	LIGGETT SELECT FF MENTH BOX 100	20PK	CTN	783		23482.17	33590.70	10108.53	.30	
102815	LIGGETT SELECT ULTRA 100 BX	20PK	CTN	1485		44535.15	63706.50	19171.35	.30	
100002	MARLBORO BLACK BOX K/S SOFTPACK	20PK	CTN	3		146.70	341.70	195.00	.57	
100003	MARLBORO BLACK BOX 100	20PK	CTN	3		146.70	341.70	195.00	.57	
100058	MARLBORO BLACK BOX 100 B2G\$2	20PK	CTN	3		146.70	341.25	194.55	.57	
100004	MARLBORO BLACK MEN BOX 100	20PK	CTN	5		244.50	569.50	325.00	.57	
100028	MARLBORO BLACK MEN SPEC BLEND B 100	20PK	CTN	3		161.70	376.50	214.80	.57	
100026	MARLBORO BLACK MEN SPEC BLEND BX KS	20PK	CTN	3		161.70	376.50	214.80	.57	
100024	MARLBORO BLACK SPEC BLEND BOX KING	20PK	CTN	3		161.70	376.50	214.80	.57	
100027	MARLBORO BLACK SPEC BLEND BOX 100	20PK	CTN	7		377.30	878.50	501.20	.57	
100001	MARLBORO BLEND BOX K/S SOFTPACK	20PK	CTN	5		219.50	512.50	293.00	.57	
100005	MARLBORO BLEND BOX KING #27	20PK	CTN	3		161.70	376.50	214.80	.57	
100006	MARLBORO BLEND BOX KING #54	20PK	CTN	3		161.70	376.50	214.80	.57	
100007	MARLBORO BLEND BOX 100 #54	20PK	CTN	6		323.40	753.00	429.60	.57	
100008	MARLBORO BLUE MEN BOX K/S	20PK	CTN	6		323.40	753.00	429.60	.57	
100010	MARLBORO BLUE MEN BOX 100	20PK	CTN	2		107.80	251.00	143.20	.57	
100013	MARLBORO BLUE MEN 72	20PK	CTN	4		215.60	502.00	286.40	.57	
100009	MARLBORO GOLD BOX KING	20PK	CTN	2		107.80	251.00	143.20	.57	
113200	MARLBORO GOLD BOX 100	20PK	CTN	872		47000.80	109436.00	62435.20	.57	
100011	MARLBORO GOLD KING	20PK	CTN	2		107.80	251.00	143.20	.57	
100012	MARLBORO GOLD MEN BOX 100	20PK	CTN	2		107.80	251.00	143.20	.57	
100016	MARLBORO GOLD 100	20PK	CTN	602		32447.80	75551.00	43103.20	.57	
100014	MARLBORO GREEN MEN 72	20PK	CTN	2		107.80	251.00	143.20	.57	
100017	MARLBORO RED LABEL BOX KING	20PK	CTN	2		107.80	251.00	143.20	.57	
100018	MARLBORO RED LABEL BOX 100	20PK	CTN	6		323.40	753.00	429.60	.57	
100019	MARLBORO SILVER BOX KING	20PK	CTN	9		485.10	1129.50	644.40	.57	
100020	MARLBORO SILVER BOX 100	20PK	CTN	6		323.40	753.00	429.60	.57	

CDR Customer Conference		VELOCITY SUMMARY (BY ITEM)			JEANNINE	CVFZPFR	4/08/13 12:56:37		Page	2	
From: 01/01/13 To: 03/31/13											
Item/UPC	Description	-Packed-	U/M	Whole Units	Each Units	Net Dollars	Retail Dollars	Profit Dollars	Profit Pct.		
100021	MARLBORO SILVER BOX 72	20PK	CTN	9		485.10	1129.50	644.40	.57		
100022	MARLBORO SILVER MENTHOL BOX KING	20PK	CTN	9		485.10	1129.50	644.40	.57		
100023	MARLBORO SILVER MENTHOL BOX 100	20PK	CTN	11		592.90	1380.50	787.60	.57		
100029	MARLBORO SPEC BLEND RED BOX KING	20PK	CTN	9		485.10	1129.50	644.40	.57		
100030	MARLBORO SPEC BLEND RED BOX 100	20PK	CTN	11		592.90	1380.50	787.60	.57		
100031	MARLBORO VIRGINIA BLEND BOX KING	20PK	CTN	8		431.20	1004.00	572.80	.57		
100032	MARLBORO VIRGINIA BLEND BOX 100	20PK	CTN	8		431.20	1004.00	572.80	.57		
100040	MERIT BLUE BOX KING	20PK	CTN	7		439.88	629.30	189.42	.30		
100041	MERIT BLUE BOX 100	20PK	CTN	10		628.40	899.00	270.60	.30		
100042	MERIT BLUE 100	20PK	CTN	7		439.88	629.30	189.42	.30		
100043	MERIT BRONZE BOX KING	20PK	CTN	10		628.40	899.00	270.60	.30		
100044	MERIT BRONZE BOX 100	20PK	CTN	8		502.72	719.20	216.48	.30		
100045	MERIT GOLD BOX KING	20PK	CTN	9		565.56	809.10	243.54	.30		
100046	MERIT GOLD MENTHOL 100	20PK	CTN	9		565.56	809.10	243.54	.30		
100047	MERIT GOLD 100	20PK	CTN	10		628.40	899.00	270.60	.30		
100048	MERIT SILVER MENTHOL K/S	20PK	CTN	7		439.88	629.30	189.42	.30		
100049	MERIT SILVER MENTHOL 100	20PK	CTN	10		628.40	899.00	270.60	.30		
115401	PALL MALL 100 BOX	20PK	CTN	153		6129.18	14305.50	8176.32	.57		
118800	VANTAGE MENT 100	20PK	CTN	2001		91505.73	213106.50	121600.77	.57		
100051	VIRGINIA SLIM GOLD BOX 100	20PK	CTN	3		167.04	388.50	221.46	.57		
100052	VIRGINIA SLIM GOLD MEN BOX 100	20PK	CTN	3		167.04	388.50	221.46	.57		
100053	VIRGINIA SLIM GOLD MEN 120	20PK	CTN	3		167.04	388.50	221.46	.57		
100054	VIRGINIA SLIM GOLD 120	20PK	CTN	3		167.04	388.50	221.46	.57		
100057	VIRGINIA SLIM SILVER BOX 100	20PK	CTN	3		167.04	388.50	221.46	.57		
119526	VIRGINIA SLIM SILVER MEN BOX 100	20PK	CTN	843		46938.24	109168.50	62230.26	.57		
100055	VIRGINIA SLIMS MENTHOL BOX 100	20PK	CTN	5		278.40	647.50	369.10	.57		
100056	VIRGINIA SLIMS MENTHOL 100	20PK	CTN	5		278.40	647.50	369.10	.57		
120200	WINSTON 100 LIGHT	20PK	CTN	1203		52535.01	122585.70	70050.69	.57		
*** Category Totals ***						16484	710006.12	1413115.95	703109.83		
Final totals						16484	710006.12	1413115.95	703109.83		
** END OF REPORT **											

Veloc. Item/Cust Summary

(Value of Y entered for Print Item/Cust Summary? field.)

CDR Customer Conference		Veloc. Item/Cust Summary		JEANNINE	GWR6PFR	4/08/13 13:37:03	Page 1
From: 01/01/13 To: 03/31/13							
Cust #	Name	Full	Eaches	Dollars			
Item/UPC: 306557 WHITE OWL BLUNT GRAPE							
99000	99 MART PLUS	3		48.75			
100001	STOP 'N SHOP	1		16.25			
100003	BOB'S SHELL	5		81.25			
100222	TODD'S COUNTRY CORNER	1		16.25			
100301	THREE RIVERS CHEVRON	1		16.25			
100801	BARON EXPRESS #2 BP	2		32.50			
100802	CRANKY CORNER QUICK STOP	3		48.75			
100850	EXPRESS WAY FOOD MART	2		29.18			
100857	JR FOOD MART - FOLSOM	1		16.25			
100900	JR FOOD MART - ABITA	1		16.25			
300133	SAIA'S SUPERMARKET	26		422.50			
320033	KINGS GROCERY	1		16.25			
320055	OCEAN SPRINGS QUICK STOP	13		211.25			
320091	LIL SHORT STOP - VANCELEVE	1		16.25			
320092	LIL SHORT STOP - OCEAN SPRINGS	1		16.25			
380100	MISSISSIPPI STOP N GO	1		16.25			
380110	MISS STOP N GO #110	2		32.50			
500101	UNION GROVE GROCERY	2		32.50			
700180	L & M GROCERY	5		81.25			
770005	PARK IT MARKET	1		16.25			
771230	B & D FOOD STORE	3		48.75			
800237	DANNY & CLYDE'S FOOD STORE #20	1		16.25			
800333	KINGS FOREST EXXON	1		16.25			
900600	USA CONVENIENCE STORE #600	1		14.59			
Totals For: 306557 WHITE OWL BLUNT GRAPE		79		1278.77			

CDR Customer Conference		Veloc. Item/Cust Summary		JEANNINE	GWR6PFR	4/08/13 13:37:03	Page 2
From: 01/01/13 To: 03/31/13							
Cust #	Name	Full	Eaches	Dollars			
Item/UPC: 303778 WINCHESTER LITTLE CIGAR							
99000	99 MART PLUS	3		137.22			
100001	STOP 'N SHOP	1		39.70			
100003	BOB'S SHELL	5		198.50			
100222	TODD'S COUNTRY CORNER	1		39.70			
100301	THREE RIVERS CHEVRON	1		39.70			
100801	BARON EXPRESS #2 BP	2		79.40			
100802	CRANKY CORNER QUICK STOP	3		119.10			
100850	EXPRESS WAY FOOD MART	2		72.80			
100857	JR FOOD MART - FOLSOM	1		39.70			
100900	JR FOOD MART - ABITA	1		39.70			
300133	SAIA'S SUPERMARKET	25		992.50			
320033	KINGS GROCERY	1		38.26			
320055	OCEAN SPRINGS QUICK STOP	13		497.38			
320091	LIL SHORT STOP - VANCELEVE	1		38.26			
320092	LIL SHORT STOP - OCEAN SPRINGS	1		38.26			
380100	MISSISSIPPI STOP N GO	1		38.26			
380110	MISS STOP N GO #110	2		76.52			
500101	UNION GROVE GROCERY	2		79.40			
700180	L & M GROCERY	5		198.50			
770005	PARK IT MARKET	1		45.74			
771230	B & D FOOD STORE	3		137.22			
800237	DANNY & CLYDE'S FOOD STORE #20	1		39.70			
800333	KINGS FOREST EXXON	1		39.70			
Totals For: 303778 WINCHESTER LITTLE CIGAR		77		3065.22			
Final totals		156		4343.99			
** END OF REPORT **							

Printing A Customer Weekly Movement Report

The Customer Weekly Movement Report details 12 weeks of item movement for one or more customers.

```

User: JEANNINE           Menu: CUSPCV1           Date: 2/25/08

===== > S P E C I A L   C U S T O M E R   R E P O R T S < =====
|||||||
THE  ||                1. Customer Price & Retail List
DAC  ||                2. Authorized Item List
SYSTEM ||            3. Velocity Report
|||||||                4. Customer Weekly Report
                                5. Price Change Notification
                                6. Print Customers With Invalid Codes
                                7. Office Staff Price List
                                8. Print future price changes
                                9. Print Account Analysis
                                10. Monthly Cigarette Sales

                                M E N U   C A L L S
19.                                20. Customer Reports           21.
22.                                23. Dac Main Menu           90. Sign Off

=====
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=>

```

1. Select option 4 (Customer Weekly Report) from the Special Customer Reports screen. The Display For Cust Movement screen appears.

```

BSOPDFR   DISPLAY Creative Data Research, Inc.           2/25/08 15:04:34
                        Display For Cust Movement
Customer Name           Cust #  Corp #  Slsman  Demographic

Start Date -->         Report Will Contain 12 Weeks Prior To The Date Entered.
Beg. Cls             End Cls             Sort: 2  (1=Item #, 2=Vendor)  JOBQ BOOK

Type options, press Enter.
M=Mark  U=Unmark

?  Customer Name           Cust #  Corp #  Slsman  Demographic
B & D FOOD STORE           771230  771230  20
BARON EXPRESS #2 BP       100801  100801  10
BIG P MINI MART           320001  320001  20
BOB'S SHELL               100003  100003  10
CRANKY CORNER QUICK STOP  100802  100802  20
DANNY & CLYDE'S FOOD STORE #20  800237  800237  20
DIANNE'S GROCERY          100002  100002  10
EXPRESS WAY FOOD MART     100850  100850  20
GAS-N-SHOP #6             100855  100855  10
JR FOOD MART - ABITA      100900  100900  20  +

F1=Selected Only  F2=Show All  F3=Exit  F6=Submit Print

```

2. Enter a date for the **Start Date** (6,n) field to limit the report of item movement to the 12 weeks prior to the designated date.
3. Enter sales class numbers for the **Beg Cls** and **End Cls** (5,n) fields.
4. Enter one of the following values to designate the sorting criteria:
 - 1 - item number.
 - 2 - vendor code.
5. If necessary, enter another job queue for the **JobQ** (10,a) field.
6. Use <Page Down> to find the desired customers, enter M (Mark) in the selection column next to each customer name, and press <Enter>.
7. Press <F6> to print.

Customer Weekly Movement Report

Creative Data Research, Inc. Customer Weekly Movement Report JEANNINE GSVVFFR 2/25/08 14:48:51 Page 1
 ***** Movement Over 12 Weeks *****

Item #	Description	Week 1 Week 7	Week 2 Week 8	Week 3 Week 9	Week 4 Week 10	Week 5 Week 11	Week 6 Week 12		
Customer Number 100002 DIANNE'S GROCERY		Start Date: 2/25/08							
Vendor Number BIC001 BIC CORPORATION									
902400	BIC CLASSIC MED BLACK 2PK	2 EA 0 EA	0 EA 0 EA	2 EA 0 EA	0 EA 0 EA	0 EA 0 EA	4 EA 0 EA	Total: 8	
802680	BIC LIGHTER COMFORT LITE	0 EA 0 EA	0 EA 0 EA	2 EA 0 EA	0 EA 0 EA	0 EA 0 EA	3 EA 0 EA	Total: 5	
802662	BIC LIGHTER MINI CLASSIC 3PK	2 PK 0 PK	0 PK 0 PK	2 PK 0 PK	0 PK 0 PK	0 PK 0 PK	4 PK 0 PK	Total: 8	
902026	BIC RED CRYSTAL	2 EA 0 EA	0 EA 0 EA	2 EA 0 EA	0 EA 0 EA	0 EA 0 EA	3 EA 0 EA	Total: 7	
902663	ZIPPO BLACK MATT	2 EA 0 EA	0 EA 0 EA	2 EA 0 EA	0 EA 0 EA	0 EA 0 EA	4 EA 0 EA	Total: 8	
Vendor Number HER001 HERSHEY CHOCOLATE									
418950	HERSHEY ALMOND 36CT	2 BOX 0 BOX	0 BOX 0 BOX	2 BOX 0 BOX	0 BOX 0 BOX	0 BOX 0 BOX	3 BOX 0 BOX	Total: 7	
439635	HERSHEY BITES 11 OZ	2 BAG 0 BAG	0 BAG 0 BAG	2 BAG 0 BAG	0 BAG 0 BAG	0 BAG 0 BAG	4 BAG 0 BAG	Total: 8	
616600	HERSHEY CHOCOLATE SYRUP BOTTLE 24OZ	2 EA 0 EA	0 EA 0 EA	2 EA 0 EA	0 EA 0 EA	0 EA 0 EA	4 EA 0 EA	Total: 8	
439397	HERSHEY HUGS 12 OZ	2 BAG 0 BAG	0 BAG 0 BAG	2 BAG 0 BAG	0 BAG 0 BAG	0 BAG 0 BAG	3 BAG 0 BAG	Total: 7	
439394	HERSHEY KISSES 12 OZ	0 CSE 0 CSE	0 CSE 0 CSE	2 CSE 0 CSE	0 CSE 0 CSE	0 CSE 0 CSE	4 CSE 0 CSE	Total: 6	
439393	HERSHEY MINIATURES 12 OZ	0 CS 0 CS	0 CS 0 CS	2 CS 0 CS	0 CS 0 CS	0 CS 0 CS	3 CS 0 CS	Total: 5	
403078	HERSHEY NUGGET ASSORTED	0 CS 0 CS	0 CS 0 CS	2 CS 0 CS	0 CS 0 CS	0 CS 0 CS	4 CS 0 CS	Total: 6	
439336	HERSHEY PLAIN GIANT BAR	0 BOX 0 BOX	0 BOX 0 BOX	2 BOX 0 BOX	0 BOX 0 BOX	0 BOX 0 BOX	3 BOX 0 BOX	Total: 5	
Vendor Number KEE001 KEEBLER COMPANY									
561158	KEEBLER CHIPS DELUXE 20Z	2 CTN 0 CTN	0 CTN 0 CTN	2 CTN 0 CTN	0 CTN 0 CTN	0 CTN 0 CTN	3 CTN 0 CTN	Total: 7	
561759	KEEBLER CLUB CRACKER 5.25 OZ	2 BOX 0 BOX	0 BOX 0 BOX	2 BOX 0 BOX	0 BOX 0 BOX	0 BOX 0 BOX	4 BOX 0 BOX	Total: 8	
631127	KEEBLER FUDGE STRIPE COOKIES 11.5OZ	2 BAG 0 BAG	0 BAG 0 BAG	2 BAG 0 BAG	0 BAG 0 BAG	0 BAG 0 BAG	3 BAG 0 BAG	Total: 7	
561161	KEEBLER PECAN SANDIES 2 OZ	2 BOX 0 BOX	0 BOX 0 BOX	2 BOX 0 BOX	0 BOX 0 BOX	0 BOX 0 BOX	4 BOX 0 BOX	Total: 8	
561167	KEEBLER VIENNA CREMES 20Z	2 CTN 0 CTN	0 CTN 0 CTN	2 CTN 0 CTN	0 CTN 0 CTN	0 CTN 0 CTN	3 CTN 0 CTN	Total: 7	
Vendor Number LIG001 LIGGETT & MEYERS TOBACCO									
102811	LIGGETT SELECT FF MENTH BOX 100	2 CTN 0 CTN	0 CTN 0 CTN	2 CTN 0 CTN	0 CTN 0 CTN	0 CTN 0 CTN	4 CTN 0 CTN	Total: 8	
102815	LIGGETT SELECT ULTRA 100 BX	2 CTN 0 CTN	0 CTN 0 CTN	2 CTN 0 CTN	0 CTN 0 CTN	0 CTN 0 CTN	3 CTN 0 CTN	Total: 7	

Printing Future Price Changes Reports

The Future Price Changes reports, which are based on the global price change records, are printed for customers who require notification of future price changes. Refer to Working With Global Price Changes of the Item File Maintenance document for additional information.

Refer to Printing An Upcoming Price Changes Report below for a sample of the Upcoming Price Changes report that is printed automatically when users print the Future Price Changes report.

Future Price Change reports:

- List the customer's price, the retail, and the retailers' profit percentage before and after the global price change takes effect.
- List the date of the changes.
- Include only items for which notification is designated in the global price change record. Refer to Working With Global Price Changes of the Item File Maintenance document for information about the **Notify** field.
- Are printed only for customers who require notification (with one exception described in the instructions below). Refer to Working With Customers above for information about the **Notify Price Chg** field.
- Are limited to customers and items for which customer/item records exist. Refer to Working With Customer/Item Records of the Billing File Maintenance document for additional information.

The universal product code (UPC) number which is printed on Future Price Changes reports is the UPC of an item's standard selling level unless another unit of measure is designated by the **Price Chg. Rpt. UPC U/M** field of the SYS015 default system option. Refer to the DAC Default System Options document for additional information.

The customer's price and retail at the standard selling unit appear on the reports by default, but can be overridden. Refer to Using A Different U/M For Prices below for information about using a customer's invoice options record to designate a different unit of measure.

Users also have the option of generating and printing a batch of retail shelf labels when printing a Future Price Changes report for a single customer. Refer to the Retail Shelf Labels document for additional information.

When the **Generate Retail Label Batches?** option is used, as described in the following instructions, labels are included in a batch for only the items with retail prices that are changed by the price change. Label batches are only generated for a

customer if *Y* for yes is entered for the **Retail Labels?** field of the customer's record. Refer to Working With Customers for additional information.

Refer to Printing Price Change Notifications below for information about the Notify of Price Changes reports that are printed *after* global price changes have been made.

```

User: JEANNINE           Menu: CUSPCV1           Date: 8/20/13

===== > S P E C I A L   C U S T O M E R   R E P O R T S <=====
=====
|||||||
THE  ||           1. Customer Price & Retail List
DAC  ||           2. Authorized Item List
SYSTEM ||         3. Velocity Report
|||||||           4. Customer Weekly Report
|||              5. Price Change Notification
|||              6. Print Customers With Invalid Codes
|||              7. Office Staff Price List
|||              8. Print future price changes
|||              9. Print Account Analysis
|||              10. Monthly Cigarette Sales

M E N U   C A L L S
19.                20. Customer Reports           21.
22.                23. Dac Main Menu             90. Sign Off

=====
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==>

```

1. Select option 8 (Print Future Price Changes) from the Special Customer Reports screen. The Print Future Price Changes screen appears.

```

GSG2PVR  ENTER  CDR Customer Conference           8/20/13 14:24:56
                Print Future Price Changes

Corporate Number . . . . . _____ (Leave blank for all customers)
** O R **
Customer Number . . . . . _____ (Leave blank for all customers)

Limit to notified customers only? _ (Y/N)

Print changes effective from . _____ to _____

Use Allowances? . . . . . _ (Y, N, Blank)

Purge old change details? . . . . N (Y/N)

Generate Retail Label Batches? _ (Y, N, Blank)

F3=Exit  F4=Search  F6=Print

```

2. To print a report for a single customer, enter the customer number for the **Customer Number** (6,n) field, or press <F4> to select a number from the Select Customer Master screen.
3. To print reports for more than one customer, leave the **Customer Number** field blank, and enter *Y* (yes) for the **Limit to notified customers only?** (1,a) field.
4. Enter a range of dates for the **Print changes effective from** and **to** (6,n) fields to limit the changes which are included in the report.
5. To include selling allowances in the calculation of the item's prices, enter *Y* (yes) for the **Use Allowances?** (1,a) field.

6. To eliminate price change records for which reports have been printed, enter *Y* (yes) for the **Purge old change details** (1,a) field.
7. To print reports for more than one customer, press <F6> (Print) and press <Enter> to confirm. The Special Customer Reports screen appears.
8. To generate retail shelf label batches with the report for a single customer, enter *Y* (yes) for the **Generate Retail Label Batches?** (1,a) field, and press <Enter>.

```

GSG2PVR  ENTER  CDR Customer Conference          8/20/13 14:26:44
                Print Future Price Changes

Corporate Number . . . . . _____ (Leave blank for all customers)
** O R **
Customer Number . . . . . 100002 (Leave blank for all customers)

Limit to notified customers only? _ (Y/N)

Print changes effective from . 82013 to 83013

Use Allowances? . . . . . _ (Y, N, Blank)

Purge old change details? . . . N (Y/N)

Generate Retail Label Batches? Y (Y, N, Blank)
      Print Retail?           _ (Y, N, Blank)
      UPC To Print :         _ (1-4, Blank)
      Auto Print Batches?    _ (Y, N, Blank)

F3=Exit  F4=Search  F6=Print

```

9. Enter data for the following fields:
 - **Print Retail?** (1,a) field - enter *Y* (yes) to designate that retail prices are printed on the label if possible.
 - **UPC To Print** (1,n) field - enter *1*, *2*, *3* or *4* to designate which UPC numbers are printed on the labels if possible.
 - **Auto Print Batches?** (1,a) field - enter *Y* (yes) to designate that the labels are automatically printed.
10. Press <F6> (Print) and press <Enter> to confirm. The Special Customer Reports screen appears.

Future Price Changes Reports

Creative Data Research, Inc.		Future Price Changes		JEANNINE	GSGOPFR	3/31/08 14:48:09		Page	1	
Customer Number	Customer Name									
100002	DIANNE'S GROCERY									
78352	HWY 437									
COVINGTON	LA 70435									
Item Number	Whs. Code	UPC Number	Price Before	Price After	Retail Before	Prof. % Before	Retail After	Prof. % After	Date of Change	
418950	1	HERSHEY ALMOND 36CT	03400024100	14.160	14.260	.69	42.99	.79	49.85	4/01/08
439635	1	HERSHEY BITES 11 OZ	03400092320	21.860	21.960	2.99	39.07	3.09	40.77	4/01/08
439397	1	HERSHEY HUGS 12 OZ	03400011000	29.060	29.170	39.50	26.43	39.60	26.33	4/01/08
439394	1	HERSHEY KISSES 12 OZ	03400013000	58.130	58.230	6.95	30.29	7.05	31.17	4/01/08
439393	1	HERSHEY MINIATURES 12 OZ	03400021303	58.130	58.230	3.95	38.68	4.05	40.09	4/01/08
403078	1	HERSHEY NUGGET ASSORTED	03400001688	59.900	60.000	10.85	53.99	10.95	54.33	4/01/08
439336	1	HERSHEY PLAIN GIANT BAR	03400019036	31.800	31.900	2.15	38.37	2.25	40.92	4/01/08

Creative Data Research, Inc.		Future Price Changes		JEANNINE	GSGOPFR	3/31/08 14:48:09		Page	2	
Customer Number	Customer Name									
100802	CRANKY CORNER QUICK STOP									
28098	HWY 40									
FOLSOM	LA 70444									
Item Number	Whs. Code	UPC Number	Price Before	Price After	Retail Before	Prof. % Before	Retail After	Prof. % After	Date of Change	
418950	1	HERSHEY ALMOND 36CT	03400024100	16.560	16.660	.69	33.33	.79	41.42	4/01/08
439635	1	HERSHEY BITES 11 OZ	03400092320	26.400	26.500	2.99	26.42	3.09	28.53	4/01/08
439397	1	HERSHEY HUGS 12 OZ	03400011000	35.100	35.200	39.50	11.13	39.60	11.11	4/01/08
439394	1	HERSHEY KISSES 12 OZ	03400013000	70.200	70.300	6.95	15.82	7.05	16.90	4/01/08
439393	1	HERSHEY MINIATURES 12 OZ	03400021303	70.200	70.300	3.95	25.94	4.05	27.67	4/01/08
403078	1	HERSHEY NUGGET ASSORTED	03400001688	70.000	70.100	10.85	46.23	10.95	46.65	4/01/08
439336	1	HERSHEY PLAIN GIANT BAR	03400019036	38.400	38.500	2.15	25.58	2.25	28.70	4/01/08
Final totals										
** END OF REPORT **										

Using A Different U/M For Prices

Users have the option of overriding the standard selling unit as the one used for designating the price and retail appearing in the Future Price Changes reports printed for a specific customer. The instructions below describe using a customer's invoice option record to designate the desired unit of measure.

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.
2. Select option 3 (Billing Related Maintenance) from the File Maintenance screen. The Billing File Maintenance #1 screen appears.
3. Select option 19 (BF Maintenance #2) from the Billing File Maintenance #1 screen. The Billing File Maintenance #2 screen appears.

```

User: JEANNINE           Menu: BFM2CV1           Date: 8/21/13

===== > B I L L I N G   F I L E   M A I N T E N A N C E   # 2 <=====
=====
|||||
THE  ||          1. Work With Customer Category Descs.
DAC  ||          2. Work With Customer Categories
SYSTEM ||        3. Update C/I File With Customer Categories
|||||           4. Create/Update Authorized Item Records
|||||           5. Edit Billing Reasons
|||            6. Work With Invoice Boxes
|||            7. Define Invoice Boxes
|||            8. Define Invoice Messages
|||            9. Order Status Change(Caution!!!)
|||           10. Work With Customer Invoice Options
|||           11. Work With Special Billing Charges
|||           M E N U   C A L L S
19. VoCollect Maint   20. Billing System       21. Billing Reports
22. File Maintenance  23. Dac Main Menu       90. Sign Off
=====
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===>

```

4. Select option 10 (Work With Customer Invoice Options) from the Billing File Maintenance #2 screen. The Work With Customer Invoice Options screen appears.

```

BSRJDFR  DISPLAY CDR Customer Conference      8/21/13 11:47:28
Work With Customer Invoice Options

Position Edit
Customer Customer
-----
Type options, press Enter.
2=Edit Record

? Application Customer Customer Name
  ID      Number
- 002     99000   99 MART PLUS
- 002     100001  STOP 'N SHOP
- 002     100002  DIANNE'S GROCERY
- 002     100003  BOB'S SHELL
- 002     100004  SNYDER'S STOP & GO
- 002     100222  TODD'S COUNTRY CORNER
- 002     100301  THREE RIVERS CHEVRON
- 002     100801  BARON EXPRESS #2 BP
- 002     100802  CRANKY CORNER QUICK STOP
- 002     100850  EXPRESS WAY FOOD MART      +

F3=Exit F4=Search F8=Customer Label Opts F9=Order Splits F10=Add

```

5. Enter the desired customer's number for **Edit Customer** field, and press <Enter>. The Customer Invoice Options screen appears.

```

BSRFE1R  CHANGE  CDR Customer Conference      8/21/13 11:50:03
                        Customer Invoice Options

H.M. Application Id   :   002      Invoice Alternate Sorting
Customer Number      :   100003    BOB'S SHELL
Use Alternate Sort:   _           (Yes,No,*Blank)      Split Cust Remote Orders _
Print Which UPC?     :   _         (1-4, *Blank)
Omit P & L?          :   _         (Yes, No, *Blank)
Print Each Price?    :   _         (Yes, No, *Blank)
(NOTE: Each price will print in place of retail on invoice.)
Page Break On Category? _         (Yes, No, *Blank)
(NOTE: This only applies to the category sort.)
Customer P.O.:       _____ (Enter either a P.O. # or *YES)
Print Extended Retail? _         (Yes, No, *Blank)
Hide Unit/Ext. Price? _         (Yes, No, *Blank)
Print Check In Document _       (Yes, No, *Blank)
Use Custom Class Sort? _       (Yes, No, *Blank)
Exclude From State Msg? _       (Yes, No, *Blank)

Invoice Primary/Alternate Sorts:
Invoice: H           Primary Sort: L Region/Location
                        Alternate Sort: C Category/Item Description
F3=Exit  F8=More UPC Options  F11=Delete

```

6. Press <F8> (More UPC Options). The Edit More UPC Options screen appears.

```

CVW2PVR  ENTER  CDR Customer Conference      8/21/13 11:50:03
                        Edit More Upc Options

Type choices, press Enter.

Print Order Scan Sheet . . . . _ (*Blank, Y or N)

For UPC with Length of . . . _

Drop First . . . . . _
Drop Last . . . . . _

Leading Zeros to Append 1-3 _

U/M For Future Price Chg Rpt . _ (1-4, *Blank)

F3=Exit

```

7. Enter 1, 2, 3 or 4 for the U/M For Future Price Chg Rpt (1,n) field, and press <Enter>.

8. Press <Enter> when prompted to confirm. The Customer Invoice Options screen appears.

9. Press <Enter> when prompted to confirm. The Work With Customer Invoice Options screen appears.

10. Press <F3> to exit. The Billing File Maintenance #2 screen appears.

Printing An Upcoming Price Changes Report

The Upcoming Price Changes report is based on global price change records. It lists the current pricing, the change prices, and the date set for all the changes that fall within a designated date range.

It is strongly recommended that the Upcoming Price Changes report is printed before using the Perform Global Price Changes application. Refer to Working With Global Price Changes of the Item File Maintenance document for additional information.

The Upcoming Price Changes report prints automatically when users print Future Price Changes reports for customers. Refer to Printing Future Price Changes Reports above for additional information.

Refer to Printing Price Change Notifications below for information about the Notify of Price Changes reports that are printed *after* global price changes have been made.

```
User: JEANNINE           Menu: CUSPCV1           Date: 8/20/13

===== > SPECIAL CUSTOMER REPORTS <=====
=====
|||||||
THE    ||                1. Customer Price & Retail List
DAC    ||                2. Authorized Item List
SYSTEM ||                3. Velocity Report
|||||||                4. Customer Weekly Report
|||||||                5. Price Change Notification
|||||||                6. Print Customers With Invalid Codes
|||||||                7. Office Staff Price List
|||||||                8. Print future price changes
|||||||                9. Print Account Analysis
|||||||                10. Monthly Cigarette Sales

                                M E N U   C A L L S
19.                                20. Customer Reports           21.
22.                                23. Dac Main Menu           90. Sign Off

=====
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====>
```

1. Select option 8 (Print Future Price Changes) from the Special Customer Reports screen. The Print Future Price Changes screen appears.

```

GSG2PVR  ENTER  CDR Customer Conference      8/20/13 14:24:56
                Print Future Price Changes

Corporate Number . . . . . _____ (Leave blank for all customers)
** O R **
Customer Number . . . . . _____ (Leave blank for all customers)

Limit to notified customers only?  _ (Y/N)

Print changes effective from .  _____ to _____

Use Allowances? . . . . . _ (Y, N, Blank)

Purge old change details? . . . . N (Y/N)

Generate Retail Label Batches?  _ (Y, N, Blank)

F3=Exit  F4=Search  F6=Print

```

2. Enter a range of dates for the **Print changes effective from** and **to** (6,n) fields to limit the changes which are included in the report.
3. To eliminate price change records for which reports have been printed, enter *Y* (yes) for the **Purge old change details** (1,a) field.
4. Press <F6> (Print) and press <Enter> to confirm. The Special Customer Reports screen appears.

```

User: JEANNINE      Menu: CUSPCV1      Date: 8/21/13

===== > S P E C I A L  C U S T O M E R  R E P O R T S <=====
=====
|||||||          1. Customer Price & Retail List
THE  ||          2. Authorized Item List
DAC  ||          3. Velocity Report
SYSTEM ||        4. Customer Weekly Report
|||||||          5. Price Change Notification
|||              6. Print Customers With Invalid Codes
|||              7. Office Staff Price List
|||              8. Print future price changes
|||              9. Print Account Analysis
|||             10. Monthly Cigarette Sales

                M E N U  C A L L S
19.              20. Customer Reports      21.
22.              23. Dac Main Menu        90. Sign Off
=====
COPYRIGHT @1992-2004@ Creative Data Research, Inc.

==>
Submitted .....

```

Upcoming Price Chages Report

Creative Data Research, Inc.		Upcoming Price Changes				JEANNINE		GSIZPFR		5/09/08 11:16:41		Page 1	
Item Number	Whse.	Description	Alt. Price	Net Before	Cost After	Base Before	Cost After	List Before	Price After	Suggested Before	Retail After	Apply Date	
418950	1	HERSHEY ALMOND 36CT		13.050	13.150	13.050	13.150	16.560	16.660	.69	.79	5/09/08	
439635	1	HERSHEY BITES 11 OZ		20.800	20.900	21.120	21.220	26.400	26.500	2.99	3.09	5/09/08	
439397	1	HERSHEY HUGS 12 OZ		27.520	27.620	28.080	28.180	35.100	35.200	39.50	39.60	5/09/08	
439394	1	HERSHEY KISSES 12 OZ		55.040	55.140	56.160	56.260	70.200	70.300	6.95	7.05	5/09/08	
439393	1	HERSHEY MINIATURES 12 OZ		55.040	55.140	56.160	56.260	70.200	70.300	3.95	4.05	5/09/08	
403078	1	HERSHEY NUGGET ASSORTED		56.710	56.810	57.870	57.970	70.000	70.100	10.85	10.95	5/09/08	
439336	1	HERSHEY PLAIN GIANT BAR		30.110	30.210	30.720	30.820	38.400	38.500	2.15	2.25	5/09/08	

** END OF REPORT **

Printing Price Change Notifications

The Notify of Price Changes reports, also called price change notifications, are printed for customers after a global price change has been made. Refer to Working With Global Price Changes of the Item File Maintenance document for additional information.

If outbound email functionality is enabled on the distributor's system, price change notifications can be automatically emailed as PDF file attachments to customers when the Notify of Price Changes reports are printed. Refer to Emailing Price Change Notifications of the System File Maintenance document for additional information.

Price change notifications:

- List the customer's price and retail before and after the global price change was made, and the date of each change.
- Include only items for which notification was designated in the global price change record. Refer to Working With Global Price Changes of the Item File Maintenance document for information about the **Notify** field.
- Are printed only for customers who require notification. Refer to Working With Customers above for information about the **Notify Price Chg** field.
- Are limited to customers who are authorized to purchase changed items. Refer to Working With Customer/Item Records of the Billing File Maintenance document for additional information.

As described in the instructions below, price change notifications can be printed only once after global price changes are made.

The universal product code (UPC) number which is printed on price change notifications will be the UPC of an item's standard selling level unless another unit of measure is designated by the **Price Chg. Rpt. UPC U/M** field of the SYS015 default system option. Refer to the DAC Default System Options document for additional information. Note: The customer's price and retail at the standard selling level appear on the price change notifications regardless of the U/M that is printed.

When an item's list price changes, a \$ (dollar sign) can be printed on invoices next to its unit price for 14 days after the change occurs. Refer to the DAC Default System Options document for information about the **Use Price Change Notify For Price Change On Invoice?** field of the SYS031 default system option.

```

User: JEANNINE           Menu: CUSPCV1           Date: 3/27/13

===== > S P E C I A L   C U S T O M E R   R E P O R T S <=====
|||||||
THE  || 1. Customer Price & Retail List
DAC  || 2. Authorized Item List
SYSTEM || 3. Velocity Report
||||||| 4. Customer Weekly Report
5. Price Change Notification
6. Print Customers With Invalid Codes
7. Office Staff Price List
8. Print future price changes
9. Print Account Analysis
10. Monthly Cigarette Sales

M E N U   C A L L S
19.      20. Customer Reports      21.
22.      23. Dac Main Menu        90. Sign Off

=====
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==>

```

1. Select option 5 (Price Change Notification) from the Special Customer Reports screen. The Print Price Change Notice screen appears.

```

DCNIPVR  ENTER  CDR Customer Conference          3/27/13 13:24:47
          Print Price Change Notice

Customer Number . . . . . _____ (To print for a single customer)
Customer Corporate Number . . . _____ (To print for a single Corporate)
Print All Customer Notices . . _ (Y/N)
Restrict To Warehouse: . . . . _____

F3=Exit  F4=Search  F6=Print

```

2. To print a price change notification for a single customer, enter the customer number for the **Customer Number** (6,n) field, or press <F4> to select a number from the Select Customer Master screen.

The report cannot be reprinted for a single customer after printing notifications for all customers (see the **Print All Customer Notices** field below).

3. To print price change notifications for a corporate customer, leave the **Customer Number** field blank, and enter a customer corporate number for the **Customer Corporate Number** (6,n) field. If necessary, press <F4> to select customer corporate numbers from the Select Corporate Master screen.

The reports cannot be reprinted for a corporate customer after printing notifications for all customers (see the **Print All Customer Notices** field below).

4. To print price change notifications for all customers, leave the **Customer Number** and **Customer Corporate Number** fields blank, and enter Y (yes) for the **Print All Customer Notices** (1,a) field.

Price change notifications cannot be reprinted after they are printed for all customers.

5. To restrict the price change notifications printed to the items of a specific warehouse, enter a warehouse code for the **Restrict To Warehouse** (6,a) field.
6. Press <F6> (Print) and press <Enter> to confirm. The Special Customer Reports screen appears.

Price Change Notifications

CDR Customer Conference		Notify of Price Changes	JEANNINE	DSSQPFR	4/03/13 11:23:38	Page 1		
Salesman 20 JOE BADEAUX								
Customer Customer Name								
Number								
380110	MISS STOP N GO #110	Prices are being held for		days after applied date.				
	PO BOX 779							
	BRANCH							
		MS 39001						
Item	Description	Qty	UPC Code	Price	Price	Retail	Retail	Date
Number		Mult.		Before	After	Before	After	Applied
200022	COPENHAGEN FINE CUT	5		16.880	16.590	3.24	2.99	4/03/13
200030	COPENHAGEN LONG CUT	5	073100014613	16.880	16.590	3.24	2.99	4/03/13
200014	SKOAL BERRY LONG CUT	5		16.880	16.590	3.24	2.99	4/03/13

CDR Customer Conference		Notify of Price Changes	JEANNINE	DSSQPFR	4/03/13 11:23:38	Page 2		
Salesman 20 JOE BADEAUX								
Customer Customer Name								
Number								
380120	MISS STOP N GO #120	Prices are being held for		days after applied date.				
	3500 EAST SIDE BLVD							
	JACKSON							
		MS 30091						
Item	Description	Qty	UPC Code	Price	Price	Retail	Retail	Date
Number		Mult.		Before	After	Before	After	Applied
200022	COPENHAGEN FINE CUT	5		16.880	16.590	3.24	2.99	4/03/13
200030	COPENHAGEN LONG CUT	5	073100014613	16.880	16.590	3.24	2.99	4/03/13
200014	SKOAL BERRY LONG CUT	5		16.880	16.590	3.24	2.99	4/03/13

CDR Customer Conference		Notify of Price Changes	JEANNINE	DSSQPFR	4/03/13 11:23:38	Page 3		
Salesman 20 JOE BADEAUX								
Customer Customer Name								
Number								
380130	MISS STOP N GO #130	Prices are being held for		days after applied date.				
	2009 FOURTH ST							
	NORTH BRANCH							
		MS 39004						
Item	Description	Qty	UPC Code	Price	Price	Retail	Retail	Date
Number		Mult.		Before	After	Before	After	Applied
200022	COPENHAGEN FINE CUT	5		16.880	16.590	3.24	2.99	4/03/13
200030	COPENHAGEN LONG CUT	5	073100014613	16.880	16.590	3.24	2.99	4/03/13
200014	SKOAL BERRY LONG CUT	5		16.880	16.590	3.24	2.99	4/03/13
** END OF REPORT **								

Printing An Invalid Route Codes List

This option prints a list of customer records that have invalid call route or delivery route numbers.

```

User: JEANNINE           Menu: CUSPCV1           Date: 2/12/10

===== > SPECIAL CUSTOMER REPORTS < =====
|||||||
THE  || 1. Customer Price & Retail List
DAC  || 2. Authorized Item List
SYSTEM || 3. Velocity Report
||||||| 4. Customer Weekly Report
5. Price Change Notification
6. Print Customers With Invalid Codes
7. Office Staff Price List
8. Print future price changes
9. Print Account Analysis
10. Monthly Cigarette Sales

M E N U   C A L L S
19. 20. Customer Reports 21.
22. 23. Dac Main Menu 90. Sign Off

=====
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```

1. Select option 6 (Print Customers With Invalid Codes) from the Special Customer Reports screen.

Check Customers Codes

Creative Data Research		Check Customer Codes						KAREN	BSRGPFR	12/06/93 14:49:04	Page	1			
Cust. Number	Customer Name	Route 1	Route 2	Route 3	Route 4	Route 5	Route 6	Route 7	Route 1	Route 2	Route 3	Route 4	Route 5	Route 6	Route 7
8	LUCKY 13	Call	Call	Call	Call	Call	Call	Call	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery
26	TEST CUSTOMER								Invalid corp #						
34	TEST CUSTOMER 2								Invalid corp #						
30100	A.J.'S BEACON	Call	Call	Call	Call	Call	Call	Call	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery
30750	COUNTRY CORNER MARKET	Call	Call	Call	Call	Call	Call	Call	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery
31099	DAILYS MARKET	Call	Call	Call	Call	Call	Call	Call	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery
31500	HARVEST MOON MARKET	Call	Call	Call	Call	Call	Call	Call	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery
31501	HARVEST MOON GRN VALLEY	Call	Call	Call	Call	Call	Call	Call	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery
31800	41ST AVE LIQUOR	Call	Call	Call	Call	Call	Call	Call	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery
32150	HECKER PASS MARKET	Call	Call	Call	Call	Call	Call	Call	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery	Delivery

Printing An Office Staff Price List

Price lists may be printed for Billing Matrices by creating customer records and assigning a Billing Matrix code to each. To print taxing information, assign tax jurisdiction codes to customer records.

Lists can only be printed for 6 matrices at a time.

```
User: JEANNINE          Menu: CUSPCV1          Date: 2/12/10
===== > S P E C I A L   C U S T O M E R   R E P O R T S < =====
|||||
THE  ||      1. Customer Price & Retail List
DAC  ||      2. Authorized Item List
SYSTEM ||    3. Velocity Report
|||||      4. Customer Weekly Report
|||||      5. Price Change Notification
|||||      6. Print Customers With Invalid Codes
|||||      7. Office Staff Price List
|||||      8. Print future price changes
|||||      9. Print Account Analysis
|||||     10. Monthly Cigarette Sales

M E N U   C A L L S
19.      20. Customer Reports      21.
22.      23. Dac Main Menu        90. Sign Off
=====
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==>
```

1. Select option 7 (Office Staff Price List) from the Special Customer Reports menu.

```
GSDOPVR  ENTER          Creative Data Research          5/03/94 14:37:33
                          Office Staff List Prompt

Type choices, press Enter.

You must enter a customer number that represents the pricing structures
you want printed on the list. Only the first number is required. All others
can be left blank and no price will be printed for those structures.

      Pricing  Pricing  Pricing  Pricing  Pricing  Pricing
      Matrix 1 Matrix 2 Matrix 3 Matrix 4 Matrix 5 Matrix 6
      800001  800002  800003  800004  800005  800006

Beginning Product Heading 1

Ending Product Heading   100

Submit to JOBQ BOOK

F3=Exit  F4=Search  F6=Print
```

2. Input up to 6 matrices, or press F4 to search for records.
3. Input a beginning and ending product heading number.
4. Change default JOBQ, if applicable.
5. Press <F6> to print list.

Office Staff Price List

For Heading 0001 - 0015 Price List For ----> 800001 800002

Item #	Item Description	Retail	PacK	U/M	Packed	Base Cost	Price Matrix	Price Matrix	Price Matrix	Price Matrix	Price Matrix	Price Matrix
Product Heading 0001 King / Regular												
005650	BARCLAY BOX 85 MMXXXXXXXXXXXXXXXXXX	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
010080	BARCLAY 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
126710	BELAIR FILTER KING	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
070806	CAMEL *WIDE* LIGHT 83 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
111503	CAMEL B2G1F DISPLAY	02000	PK	DSP	40	69.56	68.35	73.70	.00	.00	.00	.00
100700	CAMEL FILTER BOX	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
111522	CAMEL FILTER BOX B2G1F	02000	PKS	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
010306	CAMEL FILTER HARD PACK 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
999508	CAMEL LIGHT BOX	02000	PK	CTN	10	16.14	15.93	12.62	.00	.00	.00	.00
111523	CAMEL LIGHT BOX B2G1F	02000	PKS	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
002100	CAMEL LIGHT HARD PACK 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
101000	CAMEL LIGHTS	32.00	OZ	CTN	10	21.86	20.59	19.15	.00	.00	.00	.00
001160	CAMEL LITE 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
066606	CAMEL SPECIAL LIGHT BOX 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
066506	CAMEL SPECIAL LIGHT SOFT 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
021412	CAMEL ULTRA LIGHT 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
992319	CAMEL ULTRA LT	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
992318	CAMEL ULTRA LT BX	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999998	CARLTON	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
101400	CARLTON BOX	32.00	OZ	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
029010	CARLTON BOX 85	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
999910	CARLTON MENTHOL	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
005720	CARLTON MENTHOL 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
004390	CHESTERFIELD *SHORT* NF 70 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
011236	CHESTERFIELD FULL FLAVOR 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
010370	CIGARETTES PREMIUM 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
004420	COMMANDER *SHORT* NON-FILT 70	0.00		CTN	1	12.84	12.63	13.21	.00	.00	.00	.00
001140	COMMANDER KING NON-FILTER 85	0.00B		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
007515	HERBERT TAREYTON NON-FILT 85MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
102400	KENT BOX KING	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999911	KENT FILTERS	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
102100	KENT GOLDEN LIGHTS	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
001210	KENT GOLDEN LIGHTS MEN 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
001200	KENT GOLDEN LIGHTS 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
992229	KENT GOLDEN LT BOX KING	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
102300	KENT III ULTRA LIGHT KINGS	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
111584	KENT KINGS B1G1F	02000	PK	CTN	10	13.18	13.04	9.22	.00	.00	.00	.00
002500	KENT 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
999912	KOOL BOX	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
102700	KOOL FILTER	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999916	KOOL LIGHTS	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
102900	KOOL MILD BOX	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
002126	KOOL MILD BOX 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
005600	KOOL MILD 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
103000	KOOL MILDS	16.00	OZ	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
004380	KOOL REG NON-FILTER SHORT 70MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
104500	KOOL ULTRA KING	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999493	L & C CLASSIC DARK 5/4 PACK	00400	PK	CTN	10	11.76	11.70	7.60	.00	.00	.00	.00
103300	L & M FILTER	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999917	LARK FILTER	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
014142	LARK FULL FLAVOR 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
003460	LARK LIGHT 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00

Printing A Customer Account Analysis Report

The Customer Account Analysis report details the current account of an individual customer, of a corporate customer, of all the customers of a designated sales representative, or of all the distributor's customers.

```
User: JEANNINE           Menu: CUSPCV1           Date: 5/12/06

===== > S P E C I A L   C U S T O M E R   R E P O R T S < =====
=====
|||||
THE  ||           1. Customer Price & Retail List
DAC  ||           2. Authorized Item List
SYSTEM ||         3. Velocity Report
|||||           4. Customer Weekly Report
|||           5. Price Change Notification
||           6. Print Customers With Invalid Codes
||           7. Office Staff Price List
||           8. Print future price changes
||           9. Print Account Analysis
||           10. Monthly Cigarette Sales

M E N U   C A L L S
19.                               20. Customer Reports       21.
22.                               23. Dac Main Menu         90. Sign Off

=====
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```

1. Select option 9 (Print Account Analysis) from the Special Customer Reports screen. The Prompt For Customer Account Analysis screen appears.

```
GSMUPVR  ENTER  Creative Data Research           5/12/06 12:53:08
                Prompt For Customer Account Analysis

Type choices, press Enter.

Enter ONLY ONE Report Restrictor *OR* Leave All Blank To Print All Customers.

                Salesman . . . .
                Corporate Number
                Customer Number

F3=Exit  F6=Print
```

2. To print an account analysis report for the customer accounts of a particular sales representative, enter the employee code of the sales representative assigned to the customer accounts for the **Salesman** (6,a) field.
3. To print an account analysis report for a corporate customer, enter the desired corporate number for the **Corporate Number** (6,n) field.
4. To print an account analysis report for an individual customer, enter the desired customer number for the **Customer Number** (6,n) field.
5. To print account analysis reports for all the customers, leave every field of the Prompt For Customer Account Analysis screen blank.
6. Press <Enter> when data entry is complete.
7. Press <F6> (Print). The Special Customer Reports screen appears.

Customer Account Analysis

Creative Data Research-SUPPORT	Customer Account Analysis	JTIPPIN	GSMTPPFR	8/18/99 11:22:16	Page 1
Salesman No: 26					
Customer No. 100407 DANIEL'S GROCERY	Terms Days 7	*** A C C O U N T A N A L Y S I S ***			
Terms Code 2 NET 7 DAYS	Days Past Terms	Period To Date		Year To Date	
Charges This Month : 897.64	Current Due 897.64	0 - 7	Sales :	897.64	44255.11
Credits This Month : .00	Age Period 1 .00	8 - 14	Cost :	914.37	41789.74
Adj. This Month . : .00	Age Period 2 35.39-	15 - 30	Profit	16.73CR	2465.37
Net Last Month . . : .00	Age Period 3 .00	31 - 45	Profit % . . :	1.86-	5.57
Amount Due . . : 4088.26	Age Period 4 3226.01	46 - 999	# Of Orders :	2	90
Late Charge PTD 0.00	Late Charge YTD 0.00	Last Late Chg	Last Pay Date	5/25/98	Last Order Date 8/17/99
** END OF REPORT **					

Printing A Monthly Cigarette Sales Report

The Monthly Cigarette Sales report lists the total cartons sold and total sales amount for each customer in a designated month. This report is based on Accounts Receivable data, and limited to how long AR data is retained in history.

```
User: JEANNINE           Menu: CUSPCV1           Date: 2/22/08

===== > S P E C I A L   C U S T O M E R   R E P O R T S < =====
|||||||
THE  ||                   1. Customer Price & Retail List
DAC  ||                   2. Authorized Item List
SYSTEM ||                 3. Velocity Report
|||||||                   4. Customer Weekly Report
                                           5. Price Change Notification
                                           6. Print Customers With Invalid Codes
                                           7. Office Staff Price List
                                           8. Print future price changes
                                           9. Print Account Analysis
                                           10. Monthly Cigarette Sales

M E N U   C A L L S
19.                               20. Customer Reports           21.
22.                               23. Dac Main Menu             90. Sign Off

=====
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```

1. Select option 10 (Monthly Cigarette Sales) from the Special Customer Reports screen. The Monthly Cigarette Sales Report screen appears.

```
GSOXPVR  ENTER  Creative Data Research, Inc.           2/22/08 16:30:19
                Monthly Cigarette Sales Report

Type choices, press Enter.

Enter The Month For Which The Cigarette Sales Report Is Needed:
Enter The Year For Which The Cigarette Sales Report Is Needed: 8

F3=Exit  F6=Print
```

2. Enter the number of the desired month for the **Enter The Month For Which The Cigarette Sales Report Is Needed (2,n)** field.
3. Enter the number of the desired year for the **Enter The Year For Which The Cigarette Sales Report Is Needed (2,n)** field.
4. Press <F6> (Print). The Special Customer Reports screen appears.

Monthly Cigarette Sales

Creative Data Research, Inc. Monthly Cigarette Sales JEANNINE GSBLPFR 2/22/08 12:46:37 Page 1

Cust #	Customer Name	Ctns.	Sales
99000	99 MART PLUS	18	785.34
100001	STOP 'N SHOP	150	4397.20
100003	BOB'S SHELL	80	2349.10
100222	TODD'S COUNTRY CORNER	150	4397.20
100301	THREE RIVERS CHEVRON	4	94.83
100801	BARON EXPRESS #2 BP	150	4397.20
100802	CRANKY CORNER QUICK STOP	110	3442.40
100850	EXPRESS WAY FOOD MART	110	3437.40
100857	JR FOOD MART - FOLSOM	150	4397.20
320055	OCEAN SPRINGS QUICK STOP	13	364.48
320091	LIL SHORT STOP - VANCLEVE	150	4125.70
320092	LIL SHORT STOP - OCEAN SPRINGS	90	2536.20
500101	UNION GROVE GROCERY	100	2785.60
700180	L & M GROCERY	80	2327.30
770001	TEXAS TRUCK STOP	70	2422.80
770005	PARK IT MARKET	30	1026.50
770031	TAYLOR'S MINI MART	120	4767.05
770060	PACKS FOOD STORE	13	524.23
800237	DANNY & CLYDE'S FOOD STORE #20	130	3745.80
Final Totals For The Month Of DECEMBER		1718	52323.53

** END OF REPORT **

Appendix A: Customer Price Book Data File Definition

Refer to Printing A Customer Price Book for information about creating a data file with the following:

Field Name	Start	End	Length	Data Type	Comments
Customer Number	1	6	6.0	Numeric	Customer That Price Book Is For
Item Number	7	12	6.0	Numeric	Item Number
Sales Class	13	17	5.0	Numeric	Sales Class This Item Belongs To
Product Heading	18	21	4	Alpha Numeric	Product Heading This Item Belongs To
Item Description	22	56	35	Alpha Numeric	Description Of The Item
UPC Number	57	71	15	Alpha Numeric	UPC Of Selected U/M
U/M	72	74	3	Alpha Numeric	Selected U/M (Example: CTN)
MOQ	75	79	5.0	Numeric	Minimum Order Quantity
Packed	80	88	9	Alpha Numeric	How The U/M Is Packed (Example: 10 PKS)
Retail Pack	89	98	10	Alpha Numeric	How The Retail Unit Is Packed (Example: 20 CIGS)
Case Pack	99	103	5.0	Numeric	How Many Are In A Case (Example: 60)
Weight	104	110	7.2	Numeric	Weight Of Selected U/M
Unit Price	111	119	9.2	Numeric	Customer's Unit Price For Selected U/M
Retail Price	120	126	7.2	Numeric	Customer's Retail
Profit %	127	131	5.2	Numeric	Profit %
UPC Unit 1	132	146	15	Alpha Numeric	UPC For U/M 1
UPC Unit 2	147	161	15	Alpha Numeric	UPC For U/M 2
UPC Unit 3	162	176	15	Alpha Numeric	UPC For U/M 3
UPC Unit 4	177	191	15	Alpha Numeric	UPC For U/M 4
Each Price	192	198	7.2	Numeric	Customer's Price for Each Unit
Stamp Tax 1	199	203	5.2	Numeric	Applicable Stamp Tax 1
Stamp Tax 2	204	208	5.2	Numeric	Applicable Stamp Tax 2
Stamp Tax 3	209	213	5.2	Numeric	Applicable Stamp Tax 3
Stamp Tax 4	214	218	5.2	Numeric	Applicable Stamp Tax 4
Stamp Tax 5	219	223	5.2	Numeric	Applicable Stamp Tax 5
Allowance Amount	224	228	5.2	Numeric	Allowance If Applicable
Category Number	229	230	2.0	Numeric	Item Category Number