

DAC

User Guide

Pre-book Orders

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Working With Pre-book Orders

The Pre-book Orders applications are used to add pre-book orders for:

- The items of a manufacturer force out.
- The items offered with special pricing at the distributor's trade show.
- Seasonal items which are not yet available for picking.

Refer to Adding Item Records of the Item File Maintenance document for information about the **Prebook Only?** field of item records.

Pre-book orders do not appear with other "live" orders on the Work With Orders screens until they are *exported*. Because pre-book orders first flow through DAC remote orders, users have the option of manually uploading the exported orders to the Work With Orders screens.

When necessary, a vendor deal can be defined to handle the special pricing of a pre-book order's items. To use a vendor deal's pricing, the ship date of the customer's order (which is determined when the pre-book order is exported) must fall within the range of dates defined for the vendor deal. Refer to Adding Vendor Deals For Pre-book Orders of the Vendor Receivables document for additional information about the *standard booking* and *trade show booking* vendor deals which can be only be used to handle the pricing of a pre-book order's items.

Both the *buydown allowance* and *vendor rebate* type of vendor deals can affect the pricing of pre-book orders, like they affect the pricing of "live" orders, but only when neither a standard booking or trade show booking vendor deal is utilized.

Repricing can occur when a pre-book order is exported, but the price changes only appear in the "live" order. For example, if the price designated by a utilized vendor deal is changed after an item is added to the pre-book order, the item's price in the "live" order will be different.

The instructions which follow describe adding and exporting pre-book orders for individual customers as needed, and using a *pre-book default* for managing large numbers of pre-book orders for multiple customers.

Before using the Pre-book Orders applications, refer to the DAC Default System Options document for information about the following fields:

- **Prebook Demand Update** field of the SYS008 (Purchasing Options) default system option.
- **Prebook Cust Collection, Prebook # of Days Forward, Automated Prebook Orders?, Auto Purge Prebook File?** and **Prebook Alloc at Upload** fields of

the SYS015 (General System Options) default system option.

- **Transmission Placement** field of the SYS033 (Billing Options) default system option.

Also refer to Working With Remote Orders of the Billing document for information about processing pre-book orders which appear on the Work With Remote Orders screen before they are uploaded by the user to appear as “live” orders on the Work With Orders screens.

Working With Export Options

The instructions below describe using the Export Options screen to designate the criteria used for creating the customers' "live" orders, such as:

- Using the customer's primary delivery route, or their next default route. Refer to Working With Customers of the Customer File Maintenance document for additional information about the **Primary Delivery Route** field of customer records.
- Combining the items of multiple pre-book orders into a single customer order.
- Appending the items of exported pre-book orders to a current customer order with an *Open* status.
- Using the pre-book order's ship date on the customer's order.
- Printing messages with the pre-booked items on the orders' invoices. These messages could include a predefined system message, and the pre-book order's header message. Refer to Working With System Message Records of the System File Maintenance document for information about defining system messages.
- Forcing stock allocation at the time pre-book orders are uploaded to "live" orders.

The values entered for the export options are not user-specific, and unless otherwise noted below, the export options can be changed prior to exporting pre-book orders.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.

```
User: JEANNINE           Menu: OTHCV1           Date: 7/29/08

===== > O T H E R   O P E R A T I O N S < =====
=====
|||||||
THE   ||           1. Archive Functions
DAC   ||           2. Unitrac (PMSTARS Etc.)
SYSTEM ||         3. QDN Interface
|||||||           4. E-Mail
|||||||           5. Pre-Booked Order System
|||||||           6. Fast Track Reporting
|||||||           7. Hershey Reporting
|||||||           8. DEA Allocation
|||||||           9. PERCS Reporting
|||||||          10. NTS/Victory Reporting
|||||||          11. Red Bull Reporting
|||||||          M E N U   C A L L S
19.          20.
22.          23. Dac Main Menu          21.
          90. Sign Off

=====
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==>
```

2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```

User: JEANNINE           Menu: PREBKCV1           Date: 7/29/08

===== > P R E - B O O K   O R D E R S <=====
|||||||
THE      ||             1. Work With Pre-book Orders
DAC      ||             2. Work with Pre-book Items
SYSTEM  ||             3. Purge Pre-book Orders
|||||||
                                     4. Print Pre-Book Orders
                                     5. Print Pre-Book Orders by Customer
                                     6. Pre-Book Report Menu
                                     7. Work with Pre-Book Defaults
                                     8. Create Pre-Book Orders from Defaults
                                     9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu           90. Sign Off
=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
Selection or command
==>

```

3. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears.

```

CVKGDFR  DISPLAY Creative Data Research, Inc.           7/29/08  9:20:13
                                     Work with Pre-Book Orders
Pre-book# Pre-book# Pre-book  Cust#  Vendor Deal#  W.H. Deal Code Code
Ship Date      Order No.          Code Utilz #1 #2
                                     OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates

F2=Global Tools  F3=Exit  F5=Refresh  F7=All  F8=Export  F10=Create

```

4. Press <F8> (Export). The Prompt For Export screen appears.

```

CVKRDFR  DISPLAY Creative Data Research, Inc.           7/29/08  9:22:32
                                     Prompt for Export
Position to Customer
Position to Order #
----- U=Unselect
Customer / Count / Route
Order Line Item Qty Description Date

F2=Glb Tools  F3=Exit  F4=Search  F5=Refresh  F6=Print  F7=Options  F10=Export

```

5. Press <F7> (Options). The Export Options screen appears.

CVNRPVR	ENTER	Creative Data Research, Inc.	7/29/08 9:50:46
Export Options			
Route Selection:	Use this option to determine what route to use for your new order(s). Leave blank to place order on the next default route. Enter 'P' to force order onto primary route.		
Combine? (Y/N)	Use this option to combine all line items for the same customer into a single order.		
Append Options:	You may append to an existing order. Leave these options blank to create new order(s) using options above. If a suitable order can't be found, a new order will be created.		
	Route Option	F=Restrict to primary route. A=Any route will suffice.	
	Source Of Order	W=WebConsole, O=On-Line (Keyed), X=Prebook, R=Remote (Telxon)	
Date Option: . . .	Export Ship Date From Header?	(*YES, *NO, Blank)	
Message Id . . .	Attach specified message to each new line item.		
Msg. Append: . . .	Append HDR Msg. To All Detail Lines?	(*YES,*NO)	
Force Allocation?	(Y/N)		
F3=Exit & Cancel Changes	F4=Prompt	F7=Exit & Save Changes	

6. To assign the customers' primary delivery route to the customer orders that are created when pre-book orders are exported, enter *P* for the **Route Selection** field. This field is ignored if the items of the exported pre-book order are appended to an existing customer order.
7. Enter *Y* for the **Combine?** field to combine all the pre-booked items for a single customer when multiple pre-book orders are exported. The **Route Option** and **Source Of Order** fields below can be used to designate that all the pre-booked items are appended to an existing customer order; otherwise, the pre-booked items are combined to create a single new order for the customer.
8. To append the items of exported pre-book orders to existing customer orders:
 - **Route Option** field - Enter *P* to designate that the pre-booked items are added to existing customer orders which use their primary delivery route, or enter *A* to designate that the items are added to existing orders regardless of the route used.
 - **Source Of Order** field - Enter *W* (Web Console), *O* (On-Line), *X* (Pre-book) or *R* (Remote) to restrict the appending of items to only orders of the designated source, or leave this field blank to ignore the source.

If the necessary customer order does not exist, new customer orders are created using the values entered for the **Route Selection** and **Combine?** fields above.
9. To use the pre-book order's ship date on the customer's order, enter **YES* for the **Date Option** field.
10. To print a predefined system message with each of the pre-booked items on the customer orders' invoices, position the cursor at the **Message Id** field, press <F4>, and select a message from the Select Message Master screen.
11. To automatically append the pre-book order's first header message as a line item message to items as they are added to a new prebook order, enter **YES* for the **Msg Append** field. Refer to Adding Pre-book Orders for information about the **Special Message 1** field. Note: Changing the **Msg Append** field's value to **YES* only affects the items of new prebook orders, and not items added to previously created pre-book orders.

12. To force stock allocation at the time pre-book orders are uploaded to “live” orders, enter *Y* for the **Force Allocation** field.
13. Press <F7> (Exit & Save Changes) when data entry is complete. The Prompt For Export screen appears.
14. If necessary, press <F10> (Export), or press <F3> to exit. The Pre-book Orders screen appears.

Working With Individual Pre-book Orders

Typically, users follow these steps to handle pre-book orders for individual customers:

Step 1: Use the Export Options screen to designate the criteria used for creating the customers' "live" orders. Refer to Working With Export Options above for additional information.

Step 2: If necessary, define a *standard booking* vendor deal or a *trade show booking* vendor deal to handle the special pricing of the order's items. Refer to the Vendor Receivables document for additional information.

Step 3: Use the Work With Pre-book Orders application (option 1 of the Pre-book Orders screen) to add a pre-book order. Refer to Adding Pre-book Orders below for additional information.

Step 4: If desired, save pre-book order creation defaults for adding orders with duplicate header information. Refer to Working With Pre-book Order Creation Defaults for additional information.

Step 5: When the items of pre-book orders have been received, the Pre-book Global Tools screen can be used to *select* the pre-booked items for export, and the Prompt For Export screen is used to review and *export* the pre-book orders as new *Pick* type customer orders. Refer to Using Work With Pre-book Orders To Export below for additional information.

Users may also use the Work With Pre-book Items screen to *select and export* items to create the customer's "live" *Pick* type orders, as described in the following sections:

- Exporting All The Orders Of A Pre-booked Item
- Exporting Orders For Individual Customers
- Exporting The Orders Of Available Pre-booked Items.

Adding Pre-book Orders

The step-by-step instructions below describe using the Work With Pre-book Orders application to enter a pre-book order of *pending* items for an individual customer.

If necessary, define a *standard booking* vendor deal or a *trade show booking* vendor deal to handle the special pricing of the order's items before continuing with these instructions. Refer to the Vendor Receivables document for additional information.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.

```
User: JEANNINE          Menu: OTHCV1          Date: 8/19/08
===== > O T H E R   O P E R A T I O N S < =====
|||||
THE  ||          1. Archive Functions
DAC  ||          2. Unitrac (PMSTARS Etc.)
SYSTEM ||        3. QDN Interface
|||||          4. E-Mail
|||           5. Pre-Booked Order System
|||           6. Fast Track Reporting
|||           7. Hershey Reporting
|||           8. DEA Allocation
|||           9. PERCS Reporting
|||          10. NTS/Victory Reporting
|||          11. Red Bull Reporting
|||          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 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```
User: JEANNINE          Menu: PREBKC1         Date: 8/19/08
===== > P R E - B O O K   O R D E R S < =====
|||||
THE  ||          1. Work With Pre-book Orders
DAC  ||          2. Work with Pre-book Items
SYSTEM ||        3. Purge Pre-book Orders
|||||          4. Print Pre-Book Orders
|||           5. Print Pre-Book Orders by Customer
|||           6. Pre-Book Report Menu
|||           7. Work with Pre-Book Defaults
|||           8. Create Pre-Book Orders from Defaults
|||           9. Release Pre-Book Orders
|||          M E N U   C A L L S
19. Billing          20. Billing Files Maint.  21. Billing Reports
22. Remote Orders  23. Dac Main Menu          90. Sign Off
=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
Selection or command
===>
```

3. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of previously entered pre-book orders, or the *No data to display* message.

```

CVKGDFR      DISPLAY Creative Data Research, Inc.      8/19/08 16:29:01
                                Work with Pre-Book Orders
Pre-book# Pre-book# Pre-book Cust# Vendor Deal# W.H. Deal Code Code
Ship Date          Order No.      Code Utilz #1 #2
                                OPEN

2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available
R=Reset Dates

? Ship Dte   Cust                                Pbk   Code Code Pbk#
                                Order# #1 #2
9/30/08     700180 L & M GROCERY                        42                2014
9/30/08     99000 99 MART PLUS                               57
9/30/08     380120 MISS STOP N GO #120                       59
9/25/08     800333 KINGS FOREST EXXON                       43                2014
9/20/08     380120 MISS STOP N GO #120                       35                2014
9/15/08     380110 MISS STOP N GO #110                       34                2014
9/15/08     380130 MISS STOP N GO #130                       36                2014
9/13/08     320033 KINGS GROCERY                             44                2014
9/12/08     320033 KINGS GROCERY                             40                2014
9/12/08     380130 MISS STOP N GO #130                       60                +

F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create

```

4. Press <F10> (Create). The Prompt Pre-book Order CRT screen appears.

```

CVKHPVR      ENTER Creative Data Research, Inc.      8/19/08 16:29:34
                                Prompt Pre-book Order CRT

Customer Number . . . . .
Ship Date . . . . .
Create using saved defaults? (Y/N)

F3=Exit F4=Prompt

```

The **Create using saved defaults?** field does not appear on the Prompt Pre-book Order CRT screen for first-time users of the Work With Pre-book Orders application. Refer to Working With Pre-book Order Creation Defaults below for information about saving these user-specific defaults.

5. Enter a customer number for the **Customer Number** (6,n) field, or press <F4> to select a number from the Select Customer Master screen.
6. Enter the default ship date of the pre-book order for the **Ship Date** (6,n) field, and press <Enter>. This date will be used as the default ship date of each item added to the order, as described below, but can be changed or overridden as items are added.

```

CVKHPVR  ENTER  Creative Data Research, Inc.      8/19/08 17:10:09
                          Prompt Pre-book Order CRT

Customer Number . . . . . 320055 OCEAN SPRINGS QUICK STOP
Ship Date . . . . . 100108
Create using saved defaults? (Y/N)

F3=Exit  F4=Prompt

CONFIRM: Y (Y/N)

```

7. Press <Enter> when prompted to confirm. The Edit Pre-book Order Hdr Details screen appears.

```

CVVKE1R  CHANGE  Creative Data Research, Inc.      8/19/08 17:17:50
                          Edit Pre-Book Order Hdr Details

Pre-Book Order Number      85
Customer Number . . : 320055 OCEAN SPRINGS QUICK STOP

Status 1 Open              Creation Date  8/19/08 Creation Time 17:17:50

Defaults for new detail lines:

Ship Date . . . . . 100108
Warehouse Code . . . 1      MAIN WAREHOUSE
Deal Utilization . . . S (S=Standard, T=Show, X=None)
Deal Number . . . . .
User Code #1 . . . . .
User Code #2 . . . . .

Special Message 1 .
Special Message 2 .
Special Message 3 .

F3=Cancel & Exit  F4=Search  F9=Save as Default  Enter=Update & Exit

```

The pre-book order's number is automatically generated by the system, and appears for the **Pre-book Order Number** field.

8. If necessary, enter a different date for the **Ship Date** (6,n) field, and a different code for the **Warehouse Code** (6,a) field. With the cursor positioned in the **Warehouse Code** field, users may press <F4> to select a warehouse code from the Select Warehouse Master screen.
9. If special pricing of the order's items will be used, enter one of the following values for the **Deal Utilization** field; otherwise, enter *X* to designate that no special pricing is used:
 - *S* (Standard) for pricing the order's items according to a standard booking vendor deal.
 - *T* (Show) for pricing the order's items according to a trade show booking vendor deal.
10. If *S* or *T* is entered for the **Deal Utilization** field, enter the vendor deal number for the **Deal Number** (6,n) field. Users may press <F4> to select the deal number from the Select Deal For Pre-book Order screen.

```

CVVKE1R  CHANGE  Creative Data Research, Inc.      8/19/08 17:21:2
                Edit Pre-Book Order Hdr Details

Pre-Book Order Number      85
Customer Number . . : 320055 OCEAN SPRINGS QUICK STOP

Status 1 Open                Creation Date  8/19/08 Creation Time 17:17:50

Defaults for new detail lines:

Ship Date . . . . . 100108
Warehouse Code . . . 1      MAIN WAREHOUSE
Deal Utilization . . . S (S=Standard, T=Show, X=None)
Deal Number . . . . . 21  Keebler Standard Booking
User Code #1 . . . .
User Code #2 . . . .

Special Message 1 . . Keebler Standard Booking
Special Message 2 . .
Special Message 3 . .

F3=Cancel & Exit  F4=Search  F9=Save as Default  Enter=Update & Exit

```

11. If necessary, enter a two-character value for one or both of the **User Code #1** and **User Code #2** (2,a) fields. The values can be used to work with various pre-book order screens, such as the Pre-book Global Tools and Release Pre-books. If necessary, users may press <F4> to select a previously defined code from the Select Order Header Codes screen. Refer to Working With Order Header Codes of the Billing File Maintenance document for additional information.
12. Enter data as necessary for the following fields:

- **Special Message 1** (30,a) - a message which is printed at the top of the order's invoice under the *Delivery Message* heading.

Refer to Working With Export Options above for information about automatically appending this message to all the items of a new prebook order.

- **Special Message 2** (30,a) - a message which is printed at the top of the order's invoice under the *Special Message* heading.
- **Special Message 3** (30,a) - a message which is printed below the list of ordered items on the invoice.

If a code was entered for the **Account Type** field of the customer's record, the message of the corresponding **Account Type Message** field overrides the message entered for the **Special Message 3** field. Refer to Working With Account Types of the Customer File Maintenance document for additional information.

Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document for information about creating invoice messages that are printed on every customer's invoices.

13. If desired, press <F9> (Save as Default) to save this order's header details as the user's pre-book order creation default values.
14. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Edit Pre-book Order: DTE screen appears.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/19/08 17:22:19
                                Edit Pre-Book Order: DTE
Customer  320055 OCEAN SPRINGS QUICK STOP
Position  Ship Date-->          Limit Item-->          Limit Order#-->    85
-----
Item      Qty      U/M      Pending  0  Exported  0  SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr
No data to display.

```

15. To add an item to the pre-book order, enter data for the following fields, and press <Enter> when data entry is complete:
- **Item** (6,n) - the item number of the product which the customer is ordering. If necessary, press <F4> to select an item number from the Select Item By Description screen.
 - **Qty** (8,n) - the quantity of the item being ordered.
 - Optional: **U/M** (1,n) - the selling level (unit of measure) of the item. Valid values are 1, 2, 3 or 4. If no value is entered, the item's standard selling level is ordered.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/19/08 17:24:02
                                Edit Pre-Book Order: DTE
Customer  320055 OCEAN SPRINGS QUICK STOP
Position  Ship Date-->          Limit Item-->          Limit Order#-->    85
-----
Item      Qty      U/M      Pending  4  Exported  0  SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item      Qty U/M      Price      Extension
      85      4  561161      4  2  BOX      13.65      54.60
Ship Date 100108  KEEBLER PECAN SANDIES  2  OZ
      85      3  631127      4  2  BAG      15.45      61.80
Ship Date 100108  KEEBLER FUDGE STRIPE COOKIES 11.5OZ
      85      2  561759      4  2  BOX      11.30      45.20
Ship Date 100108  KEEBLER CLUB CRACKER  5.25 OZ
      85      1  561158     10  2  CTN      3.45      34.50
Ship Date 100108  KEEBLER CHIPS DELUXE  2OZ

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

As items are added to the pre-book order, the pricing which appears for each item is based on the customer's current pricing, and a vendor deal's pricing if one is utilized (see **Deal Utilization** above).

Note: To use a vendor deal's pricing, the ship date of the customer's order (which is determined when the pre-book order is exported) must fall within the range of dates defined for the vendor deal.

16. If items with different ship dates must be entered, use <F10> (Hdr) to change the default value of the **Ship Date** (6,n) field on the Edit Pre-book Order Hdr Details screen.

17. If necessary, enter a value for the **Ship Date** (6,n) field to change the expected ship date of an item.
18. Repeat the previous steps to continue adding items to the pre-book order, and press <F3> (Exit) when data entry is complete. The Work With Pre-book Orders screen appears.

CVKGDFR		DISPLAY Creative Data Research, Inc.				8/19/08 17:25:32	
Work with Pre-Book Orders							
Pre-book	Pre-book#	Pre-book	Cust#	Vendor Deal#	W.H.	Deal	Code Code
Ship Date	Order No.				Code	Utilz	#1 #2
							OPEN
2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available							
R=Reset Dates							
? Ship Dte	Cust				Pbk	Code Code	Pbk#
					Order#	#1 #2	
10/01/08	320055	OCEAN SPRINGS	QUICK STOP		85		
9/30/08	700180	L & M GROCERY			42		2014
9/30/08	99000	99 MART PLUS			57		
9/30/08	380120	MISS STOP N GO	#120		59		
9/25/08	800333	KINGS FOREST	EXXON		43		2014
9/20/08	380120	MISS STOP N GO	#120		35		2014
9/15/08	380110	MISS STOP N GO	#110		34		2014
9/15/08	380130	MISS STOP N GO	#130		36		2014
9/13/08	320033	KINGS GROCERY			44		2014
9/12/08	320033	KINGS GROCERY			40		20 +
F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create							

19. Press <F3> to exit when pre-book order entry is complete. The Pre-book Orders screen appears.

Using Work With Pre-book Orders To Export

The following instructions describe using the Work With Pre-book Orders screen to export pre-book orders *after* the Pre-book Global Tools screen is used to globally change the ship date of the pending items, and select the items for export as new *Pick* type customer orders.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.

```
User: JEANNINE           Menu: OTHCV1           Date: 4/22/09

===== > O T H E R   O P E R A T I O N S < =====
=====
|||||
THE  ||          1. Archive Functions
DAC  ||          2. Unitrac (FMSTARS Etc.)
SYSTEM ||        3. QDN Interface
|||||           4. E-Mail
|||||           5. Pre-Booked Order System
|||||           6. Fast Track Reporting
|||||           7. Hershey Reporting
|||||           8. DEA Allocation
|||||           9. PERCS Reporting
|||||          10. NTS/Victory Reporting
|||||          11. Red Bull Reporting
|||||          M E N U   C A L L S
19. Other Operations 2  20.                               21.
22.                   23. Dac Main Menu           90. Sign Off
=====
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==>
```

2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```
User: JEANNINE           Menu: PREBKCV1          Date: 4/22/09

===== > P R E - B O O K   O R D E R S < =====
=====
|||||
THE  ||          1. Work With Pre-book Orders
DAC  ||          2. Work with Pre-book Items
SYSTEM ||        3. Purge Pre-book Orders
|||||           4. Print Pre-Book Orders
|||||           5. Print Pre-Book Orders by Customer
|||||           6. Pre-Book Report Menu
|||||           7. Work with Pre-Book Defaults
|||||           8. Create Pre-Book Orders from Defaults
|||||           9. Release Pre-Book Orders
|||||          M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu           90. Sign Off
=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
Selection or command
====>
```

3. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of previously entered pre-book orders in reverse order by ship date.

```

CVKGDFR   DISPLAY Creative Data Research, Inc.           4/22/09 10:46:18
                                Work with Pre-Book Orders
Pre-book Pre-book# Pre-book Cust# Vendor Deal# W.H. Deal Code Code
Ship Date Order No. Code Utilz #1 #2
OPEN

2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available
R=Reset Dates

? Ship Dte Cust Pbk Code Code Pbk#
Order# #1 #2
4/24/09 260501 BIG JOHN'S QUICK STOP #1 7
4/24/09 100900 JR FOOD MART - ABITA 8
4/24/09 320001 BIG P MINI MART 9
4/24/09 800237 DANNY & CLYDE'S FOOD STORE #20 10

F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create

```

4. Press <F2> (Global Tools). The Pre-book Global Tools screen appears.

```

CVMHPVR   ENTER Creative Data Research, Inc.           4/22/09 10:46:35
                                Pre-book Global Tools
Q U A L I F Y :
Pre-book Number . . . . .
Ship Date Range: From . . . . . to . . . . .
Item . . . . .
Warehouse . . . . .
Vendor . . . . .
Deal # . . . . .
Customer . . . . .
Route Range: From . . . . . to . . . . . Primary must be in range? (Y/N)

Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Require pending order? . . . . . (P=Primary Route, A=Any, Blank=Not Req.)

C H A N G E :
Action . . . . . C (C=Change)
New Ship Date . . . . . (Blank means don't change)
New Item . . . . . (Blank means don't change)
Selected for Export (Y/N) (Blank means don't change)
F3=Exit F10=Perform Change F15=Copy Set of PB Orders F19=Resync Vendor#/Desc

```

5. Use one or more of the following fields to designate the pending items that qualify for changing or selecting:

- **Pre-book Number** - the qualified items are those of pre-book orders based on the designated pre-book default. If necessary, press <F4> to select a pre-book default from the Select Prebook screen.
- **Ship Date Range From and To** - the qualified items are those with a ship date which falls within the designated range of dates. This date range field can be used to globally select all the items with same ship date, and avoid using the **Item** field below to select individual items, one by one, for exporting.
- **Item (6,n)** - the qualified item's number. If necessary, press <F4> to select an item number from the Select Item By Description screen. If a value is entered for the **Item** field, users may also limit the qualified items by availability using the **Require Available Product?** field (see below).
- **Warehouse** - the qualified items are those of the designated warehouse. If necessary, press <F4> to select a warehouse code from the Select Warehouse Master screen.

- **Vendor** (6,a) - the qualified items are those purchased from the designated vendor. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
- **Deal #** (6,n) - the qualified items are those to which the designated vendor deal applies. If necessary, press <F4> to select a vendor deal from the Select Deal screen.
- **Customer** (6,n) - the qualified items are those of the designated customer's pre-book orders. If necessary, press <F4> to select a customer number from the Select Customer Master screen.
- **Route Range From and To** (6,a) - the qualified items are those of pre-book orders for customers with routes which fall within the designated range of routes. If necessary, press <F4> to select routes from the Select Route Description screen.
- **CODE #1 and CODE #2** (2,a) - the qualified items are those of pre-book orders for which the designated codes were entered for one or both the **User Code #1** and **User Code #1** fields when the orders were added. If necessary, press <F4> to select an order header code from the Select Order Header Code screen.

The names of these two fields, which appear as **CODE #1** and **CODE #2** in the screen above, are entered for the **Text For O.E. Code 1** and **Text For O.E. Code 2** fields of the SYS041 default system option. Refer to the DAC Default System Options document for additional information.

- **Deal Utilization** (1,a) - the qualified items are those for which the designated type of vendor deal applies (*S* = Standard or *T* = Show), or the items for which no vendor deal applies (*X* = None).
- **Require available product?** - If an item number was entered for the **Item** field above, *Y* (yes) can be entered to limit the qualified items by availability.
- **Require pending order?** - the qualified items are those pre-booked for customers for which "live" customer orders with an *Open* status also exist, and use the customer's primary delivery route (*P*) or use any route (*A*).

```

CVMHPVR  ENTER  Creative Data Research, Inc.          4/22/09 12:31:45
                    Pre-book Global Tools

Q U A L I F Y:
Pre-book Number . . . . .
Ship Date Range: From . . . . . to
Item . . . . . 439394 HERSHEY KISSES 12 OZ
Warehouse . . . . .
Vendor . . . . .
Deal # . . . . .
Customer . . . . .
Route Range: From . . . . . to Primary must be in range? (Y/N)

Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Require available product? (Y/N) Blank means ignore availability
Require pending order? . . (P=Primary Route, A=Any, Blank=Not Req.)

C H A N G E:
Action . . . . . C (C=Change)
New Ship Date . . . . . (Blank means don't change)
New Item . . . . . (Blank means don't change)
Selected for Export (Y/N) (Blank means don't change)
F3=Exit F10=Perform Change F15=Copy Set of PB Orders F19=Resync Vendor#/Desc

```

- To change the ship date of the qualified items, enter *C* for the **Action** field, enter a date for the **New Ship Date** field, and press <Enter>.

```

CVMHPVR  ENTER  Creative Data Research, Inc.          4/22/09 12:32:11
                    Pre-book Global Tools

Q U A L I F Y:
Pre-book Number . . . . .
Ship Date Range: From . . . . . to
Item . . . . . 439394 HERSHEY KISSES 12 OZ
Warehouse . . . . .
Vendor . . . . .
Deal # . . . . .
Customer . . . . .
Route Range: From . . . . . to Primary must be in range? (Y/N)

Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Require available product? (Y/N) Blank means ignore availability
Require pending order? . . (P=Primary Route, A=Any, Blank=Not Req.)

C H A N G E:
Action . . . . . C (C=Change)
New Ship Date . . . . . 42209 (Blank means don't change)
New Item . . . . . (Blank means don't change)
Selected for Export (Y/N) (Blank means don't change)
F3=Exit F10=Perform Change F15=Copy Set of PB Orders F19=Resync Vendor#/Desc

```

Press <F10> (Perform Change), and press <Enter> when prompted to confirm. The Work With Pre-book Orders screen appears.

```

CVKGDFF  DISPLAY Creative Data Research, Inc.        4/22/09 12:33:11
                    Work with Pre-Book Orders
Pre-book Pre-book# Pre-book Cust# Vendor Deal# W.H. Deal Code Code
Ship Date Order No. Code Utilz #1 #2
OPEN

2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available
R=Reset Dates

? Ship Dte Cust Pbk Code Code Pbk#
Order# #1 #2
4/24/09 260501 BIG JOHN'S QUICK STOP #1 7
4/24/09 100900 JR FOOD MART - ABITA 8
4/24/09 320001 BIG P MINI MART 9
4/24/09 800237 DANNY & CLYDE'S FOOD STORE #20 10

F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create
4 line items were changed.

```

```

CVMHPVR  ENTER  Creative Data Research, Inc. 4/22/09 12:34:22
                Pre-book Global Tools
Q U A L I F Y:
Pre-book Number . . . . .
Ship Date Range: From . 42209 to 42209
Item . . . . .
Warehouse . . . . .
Vendor . . . . .
Deal # . . . . .
Customer . . . . .
Route Range:      From .          to          Primary must be in range? (Y/N)

Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)

Require pending order? . . . . . (P=Primary Route, A=Any, Blank=Not Req.)

C H A N G E:
Action . . . . . C (C=Change)
New Ship Date . . . . . (Blank means don't change)
New Item . . . . . (Blank means don't change)
Selected for Export (Y/N) (Blank means don't change)
F3=Exit F10=Perform Change F15=Copy Set of PB Orders F19=Resync Vendor#/Desc

```

- To select qualified items for exporting, enter *C* for the **Action** field, enter *Y* for the **Selected for Export** field, and press <Enter>.

```

CVMHPVR  ENTER  Creative Data Research, Inc. 4/22/09 12:34:22
                Pre-book Global Tools
Q U A L I F Y:
Pre-book Number . . . . .
Ship Date Range: From . 42209 to 42209
Item . . . . .
Warehouse . . . . .
Vendor . . . . .
Deal # . . . . .
Customer . . . . .
Route Range:      From .          to          Primary must be in range? (Y/N)

Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)

Require pending order? . . . . . (P=Primary Route, A=Any, Blank=Not Req.)

C H A N G E:
Action . . . . . C (C=Change)
New Ship Date . . . . . (Blank means don't change)
New Item . . . . . (Blank means don't change)
Selected for Export (Y/N) Y (Blank means don't change)
F3=Exit F10=Perform Change F15=Copy Set of PB Orders F19=Resync Vendor#/Desc

```

Press <F10> (Perform Change), and press <Enter> when prompted to confirm. The Work With Pre-book Orders screen appears.

```

CVKGDFR  DISPLAY Creative Data Research, Inc. 4/22/09 12:35:31
                Work with Pre-Book Orders
Pre-book Pre-book# Pre-book Cust# Vendor Deal# W.H. Deal Code Code
Ship Date Order No. Code Utilz #1 #2
OPEN

2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available
R=Reset Dates

? Ship Dte Cust Pbk Code Code Pbk#
Order# #1 #2
4/24/09 260501 BIG JOHN'S QUICK STOP #1 7
4/24/09 100900 JR FOOD MART - ABITA 8
4/24/09 320001 BIG P MINI MART 9
4/24/09 800237 DANNY & CLYDE'S FOOD STORE #20 10

F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create
4 line items were changed.

```

- Press <F8> to begin exporting orders. The Prompt For Export screen appears with a list of the pre-book orders currently selected for exporting.

```

CVKRDFR   DISPLAY Creative Data Research, Inc.   4/22/09 12:36:05
                Prompt for Export
Position to Customer
Position to Order #
-----
Customer / Count / Route      U=Unselect
Order Line Item Qty Description      Date
JR FOOD MART - ABITA / 1 Lines / 210
  8      2      439394 2      HERSHEY KISSES 12 OZ      2009-04-22
BIG JOHN'S QUICK STOP #1 / 1 Lines /
  7      2      439394 2      HERSHEY KISSES 12 OZ      2009-04-22
BIG P MINI MART / 1 Lines / 500
  9      2      439394 2      HERSHEY KISSES 12 OZ      2009-04-22
DANNY & CLYDE'S FOOD STORE #20 / 1 Lines / 400
 10     2      439394 2      HERSHEY KISSES 12 OZ      2009-04-22

F2=Glb Tools F3=Exit F4=Search F5=Refresh F6=Print F7=Options F10=Export

```

9. Use the following fields at the top of the screen (use <Page Down> if necessary) to review the selected pre-book orders:
 - **Position To Customer** redisplay the screen's list beginning with the designated customer. If necessary, press <F4> to select an item from the Select Customer Master screen.
 - **Position to Order #** redisplay the screen's list beginning with the designated pre-book order. If necessary, press <F4> to select an item from the Select Pre-book Order screen.

10. To *unselect* a pre-book order, locate the order in the screen's list, enter *U* in the selection column next to the customer name, and press <Enter>.

11. To print a detailed report (see below) of the selected pre-book orders before exporting the orders, press <F6> (Print).

Print Pre-book Orders

```

Creative Data Research, Inc.   Print Pre-book Orders   JEANNINE   CVNCFPR   4/22/09 12:36:35 Page   1
Order # Customer               Ship Date Deal
Line # Item                    Qty  Unit Price  Unit Cost  Ship Date  U/M  Status
7 260501 BIG JOHN'S QUICK STOP #1  4/24/09    0
  2 439394 HERSHEY KISSES 12 OZ      2    70.20    56.16    4/22/09    2  Selected
8 100900 JR FOOD MART - ABITA      4/24/09    0
  2 439394 HERSHEY KISSES 12 OZ      2    70.20    56.16    4/22/09    2  Selected
9 320001 BIG P MINI MART        4/24/09    0
  2 439394 HERSHEY KISSES 12 OZ      2    70.20    56.16    4/22/09    2  Selected
10 800237 DANNY & CLYDE'S FOOD STORE #20  4/24/09    0
  2 439394 HERSHEY KISSES 12 OZ      2    70.20    56.16    4/22/09    2  Selected
** END OF REPORT **

```

12. If necessary, press <F7> (Options) to review or change the export options. Refer to Working With Export Options above for additional information.
13. Press <F10> (Export) to export the pre-book orders as new *Pick* type customer orders. The Work With Pre-book Orders screen appears.

If necessary, refer to Working With Remote Orders of the Billing document for information about processing pre-book orders which appear on the Work With Remote Orders screen before they are uploaded by the user to appear as “live” orders on the Work With Orders screens.

Using Work With Pre-book Items To Export

When the items of a pre-book order are available for shipping, the Work With Pre-book Items application can be used to *select* the pre-book order's items, then *export* the pre-book orders as new *Pick* type customer orders.

Refer to Working With Export Options for information about using the Export Options screen to designate criteria for creating the new customer orders.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.

```
User: JEANNINE          Menu: OTHCV1          Date: 7/23/08
=====
> O T H E R   O P E R A T I O N S <=====
=====
|||||||
THE   ||          1. Archive Functions
DAC   ||          2. Unitrac (PMSTARS Etc.)
SYSTEM ||         3. QDN Interface
|||||||          4. E-Mail
|||          5. Pre-Booked Order System
|||          6. Fast Track Reporting
|||          7. Hershey Reporting
|||          8. DEA Allocation
|||          9. PERCS Reporting
|||         10. NTS/Victory Reporting
|||         11. Red Bull Reporting
|||         M E N U   C A L L S
19.         20.         21.
22.         23. Dac Main Menu    90. Sign Off
=====
COPYRIGHT @1992-2004@ Creative Data Research, Inc.
==>
```

2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```
User: JEANNINE          Menu: PREBKCV1       Date: 7/23/08
=====
> P R E - B O O K   O R D E R S <=====
=====
|||||||
THE   ||          1. Work With Pre-book Orders
DAC   ||          2. Work with Pre-book Items
SYSTEM ||         3. Purge Pre-book Orders
|||||||          4. Print Pre-Book Orders
|||          5. Print Pre-Book Orders by Customer
|||          6. Pre-Book Report Menu
|||          7. Work with Pre-Book Defaults
|||          8. Create Pre-Book Orders from Defaults
|||          9. Release Pre-Book Orders
|||         M E N U   C A L L S
19. Billing          20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu    90. Sign Off
=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
Selection or command
==>
```

3. Select option 2 (Work With Pre-book Items) from the Pre-book Orders screen. The Work With Pre-book Items screen appears with a list of all *pending* (unexported) items.

CVL2DFR		DISPLAY Creative Data Research, Inc.		8/14/08 13:43:49	
Work with Pre-book Items					
Position to Item					
Limit to Warehouse		Limit to Pre-book#			
Limit to Vendor					
Limit to Deal Number					
Limit to Deal Utilization		(S=Standard, T=Show, X=None, Blank=Any)			
Limit to Date Range:	From	To			
Limit to User Code #1	User Code #1	User Code #2	Include Exported? N (Y/N)		
S=Select All	U=Unselect All	A=Select Available	5=Details		
? Item	Description	Total Demanded	Total Selected	Total Avail	On Order
113200	MARLBORO 100 BOX	10.00	.00	201	0
439336	HERSHEY PLAIN GIANT BAR	80.00	.00	32	0
561158	KEEBLER CHIPS DELUXE 2OZ	4.00	.00	1242	0
631127	KEEBLER FUDGE STRIPE COOKIES 11.5O	80.00	.00	5	0
770130	BLACKJACK FULL FLAVOR 16OZ	52.00	.00	3886	0
802680	BIC LIGHTER COMFORT LITE	16.00	.00	1710	0
902400	BIC CLASSIC MED BLACK 2PK	14.00	.00	0	+
F2=Global Tools F3=Exit F5=Refresh F8=Export					

When working with the Work With Pre-book Items screen, the following fields at the top of the screen can be used to locate pending items in the screen's list:

- **Position To Item** redisplay the list beginning with the designated item number. If necessary, press <F4> to select an item from the Select Item By Description screen.
- **Limit to Warehouse** limits the list to include only items of the designated warehouse.
- **Limit to Pre-book#** limits the list to include only items of pre-book orders based on the designated pre-book default. If necessary, press <F4> to select a pre-book default from the Select Pre-book screen.
- **Limit to Vendor** limits the list to include only items purchased from the designated vendor. If necessary, press <F4> to select a vendor from the Select Vendor Master screen.
- **Limit to Deal Number** limits the list to include only items to which the designated vendor deal applies. If necessary, press <F4> to select a deal from the Select Deal screen.
- **Limit to Deal Utilization** limits the list to include only items to which the designated type of vendor deal, if any or none, is used to price the pre-book order's items.
- **Limit to Date Range** limits the list to include only items which have a ship date that falls within the designated range.
- **Limit to User Code #1** and **User Code #2** limits the list to include only items of pre-book orders for which the designated values are assigned. If necessary, press <F4> to select a code from the Select Order Header Codes screen.

The following quantities are displayed for the items listed on the Work With Pre-book Items screen. Users should press <F5> (Refresh) as necessary to review the changing values of these quantities:

- *Total Demanded* - total quantity requested for each item. The total appearing on the screen is adjusted accordingly when the limits described above are used.
- *Total Selected* - total quantity selected for each item. The total appearing on the screen is adjusted accordingly when the limits described above are used.
- *Total Avail* - total quantity available (on hand minus allocated) for each item.
- *On Order* - total quantity in purchase orders for each item.

Users may include exported items in the list by blanking out all the qualifying fields, entering Y for the **Include Exported?** field, and pressing <Enter>. As illustrated below, the screen includes pre-booked items with no demand that have not yet been purged.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           8/14/08 13:43:49
                Work with Pre-book Items

Position to Item . . . . .
Limit to Warehouse . . . . .          Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization .          (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . From      To
Limit to User Code #1 . . . .      User Code #2      Include Exported? Y (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description                Total      Total      Total      On
                                Demanded   Selected   Avail      Order
113200  MARLBORO 100 BOX             10.00      .00      201        0
439336  HERSHEY PLAIN GIANT BAR        80.00      .00      32          0
561158  KEEBLER CHIPS DELUXE 2OZ         4.00      .00     1242        0
631127  KEEBLER FUDGE STRIPE COOKIES 11.50  80.00      .00      5          0
770130  BLACKJACK FULL FLAVOR 16OZ         52.00      .00     3886        0
802662  BIC LIGHTER MINI CLASSIC 3PK        .00      .00     1313        0
802680  BIC LIGHTER COMFORT LITE           16.00      .00     1710        +

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export

```

Exporting All The Orders Of A Pre-booked Item

The following instructions describe using the Work With Pre-book Items screen to export orders of one or more items for every customer requesting them regardless of availability.

1. Select option 2 (Work With Pre-book Items) from the Pre-book Orders screen. The Work With Pre-book Items screen appears with a list of all pending items.

```

CVL2DFR  DISPLAY Creative Data Research, Inc.          7/23/08 15:07:50
                Work with Pre-book Items

Position to Item . . . . .
Limit to Warehouse . . . . .          Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization .          (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . From      To
Limit to User Code #1 . . . .      User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description                      Total      Total      Total      On
                                Demanded   Selected   Avail      Order
113200  MARLBORO 100 BOX                   10.00         .00      251        0
439336  HERSHEY PLAIN GIANT BAR            210.00         .00      192        0
561158  KEEBLER CHIPS DELUXE 2OZ           18.00         .00     1288        0
631127  KEEBLER FUDGE STRIPE COOKIES 11.50  100.00         .00       55        0

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export
  
```

2. To locate a specific item, use the **Position To Item** field as illustrated below (or <Page Down> if necessary). Users may press <F4> to select an item number from the Select Item By Description screen.

```

CVL2DFR  DISPLAY Creative Data Research, Inc.          7/23/08 15:10:08
                Work with Pre-book Items

Position to Item . . . . .  561158 KEEBLER CHIPS DELUXE 2OZ
Limit to Warehouse . . . . .          Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization .          (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . From      To
Limit to User Code #1 . . . .      User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description                      Total      Total      Total      On
                                Demanded   Selected   Avail      Order
561158  KEEBLER CHIPS DELUXE 2OZ           18.00         .00     1288        0
631127  KEEBLER FUDGE STRIPE COOKIES 11.50  100.00         .00       55        0

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export
  
```

3. To *select* the item regardless of availability for every customer requesting it, enter *S* (Select All) in the selection column next to the item's number, and press <Enter>.

```

CVL2DFR      DISPLAY Creative Data Research, Inc.          7/23/08 15:14:59
                    Work with Pre-book Items

Position to Item . . . . . 561158 KEEBLER CHIPS DELUXE 20Z
Limit to Warehouse . . . . . Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . . From
                                To
Limit to User Code #1 . . . . . User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description                                Total      Total      Total      On
                                Demanded   Selected   Avail      Order
561158 KEEBLER CHIPS DELUXE 20Z                    18.00      18.00     1288      0
631127 KEEBLER FUDGE STRIPE COOKIES 11.50    100.00      .00       55      0

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export
2 line(s) were changed.

```

4. Repeat the previous steps as necessary to continue selecting items.
5. Press <F8> to begin exporting orders. The Prompt For Export screen appears with a list of the pre-book orders currently selected for exporting.

```

CVKRDFR      DISPLAY Creative Data Research, Inc.          7/25/08 11:05:29
                    Prompt for Export

Position to Customer
Position to Order #
-----
Customer / Count / Route                                U=Unselect
Order Line Item Qty Description                        Date
CRANKY CORNER QUICK STOP / 1 Lines / 110
  15      1      561158 8      KEEBLER CHIPS DELUXE 20Z      2009-01-01
OCEAN SPRINGS QUICK STOP / 1 Lines / 500
  24      1      561158 10     KEEBLER CHIPS DELUXE 20Z      2008-07-25

F2=Glb Tools  F3=Exit  F4=Search  F5=Refresh  F6=Print  F7=Options  F10=Export

```

6. Use the following fields at the top of the screen (use <Page Down> if necessary) to review the selected pre-book orders:
 - **Position To Customer** redisplay the screen's list beginning with the designated customer. If necessary, press <F4> to select an item from the Select Customer Master screen.
 - **Position to Order #** redisplay the screen's list beginning with the designated pre-book order. If necessary, press <F4> to select an item from the Select Pre-book Order screen.
7. To *unselect* a pre-book order, locate the order in the screen's list, enter *U* in the selection column next to the customer name, and press <Enter>.
8. To print a detailed report (see below) of the selected pre-book orders before exporting the orders, press <F6> (Print).

Print Pre-book Orders

Creative Data Research		Print Pre-book Orders		JTIPPIN	CVNCPFR	12/09/99 11:23:24	Page	1
Order #	Customer	Ship Date	Deal Qty	Unit Price	Unit Cost	Ship Date	U/M	Status
17	107300 BILTON GAS	12/10/99	0					
3	234930 DENTYNE RED	20	6.38	5.55	12/02/99	2	Selected	
20	100407 DANIEL'S GROCERY	12/10/99	0					
1	210200 BABY RUTH	10	12.23	11.70	12/10/99	2	Selected	
23	100407 DANIEL'S GROCERY	12/07/99	0					
1	210200 BABY RUTH	15	12.23	11.70	12/07/99	2	Selected	
3	234930 DENTYNE RED	20	5.87	5.55	12/07/99	2	Selected	
24	100035 ABC	12/08/99	0					
5	234930 DENTYNE RED	10	6.38	5.55	12/08/99	2	Selected	
25	100035 ABC	12/07/99	0					
1	210200 BABY RUTH	15	12.23	11.70	12/07/99	2	Selected	
3	234930 DENTYNE RED	20	5.87	5.55	12/07/99	2	Selected	

** END OF REPORT **

9. If necessary, press <F7> (Options) to review or change the export options. Refer to Working With Export Options above for additional information.
10. Press <F10> (Export) to export the pre-book orders as new *Pick* type customer orders. The Work With Pre-book Items screen appears.

CVL2DFR		DISPLAY Creative Data Research, Inc.		7/25/08 14:49:59	
Work with Pre-book Items					
Position to Item		Limit to Pre-book#			
Limit to Warehouse					
Limit to Vendor					
Limit to Deal Number					
Limit to Deal Utilization		(S=Standard, T=Show, X=None, Blank=Any)			
Limit to Date Range:	From	To			
Limit to User Code #1	User Code #2	Include Exported? N (Y/N)			
S=Select All	U=Unselect All	A=Select Available	5=Details		
? Item	Description	Total Demanded	Total Selected	Total Avail	On Order
113200	MARLBORO 100 BOX	10.00	.00	251	0
439336	HERSHEY PLAIN GIANT BAR	210.00	.00	192	0
631127	KEEBLER FUDGE STRIPE COOKIES	11.50	100.00	.00	55
F2=Global Tools F3=Exit F5=Refresh F8=Export					
2 orders created as a result of export.					

If necessary, refer to Working With Remote Orders of the Billing document for information about processing pre-book orders which appear on the Work With Remote Orders screen before they are uploaded by the user to appear as “live” orders on the Work With Orders screens.

Exporting Orders For Individual Customers

The following instructions describe using the Work With Pre-book Items screen to export orders of pre-booked items for specific customers.

1. Select option 2 (Work With Pre-book Items) from the Pre-book Orders screen. The Work With Pre-book Items screen appears with a list of all pending items.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           4/22/09 13:58:12
                Work with Pre-book Items

Position to Item . . . . .
Limit to Warehouse . . . . .          Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . From      To
Limit to User Code #1 . . . . .      User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description                               Total      Total      Total      On
              Demanded   Selected   Avail      Order
439336  HERSHEY PLAIN GIANT BAR                   8.00        .00        9          0
439394  HERSHEY KISSES 12 OZ                      8.00        .00       114         0

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export
    
```

2. To locate a specific item, use the **Position To Item** field as illustrated below (or <Page Down> if necessary). Users may press <F4> to select an item number from the Select Item By Description screen.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           4/22/09 13:59:32
                Work with Pre-book Items

Position to Item . . . . . 439394 HERSHEY KISSES 12 OZ
Limit to Warehouse . . . . .          Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . From      To
Limit to User Code #1 . . . . .      User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description                               Total      Total      Total      On
              Demanded   Selected   Avail      Order
439394  HERSHEY KISSES 12 OZ                      8.00        .00       114         0

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export
    
```

3. Enter 5 (Details) in the selection column next to the desired item number.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           4/22/09 13:59:32
                Work with Pre-book Items

Position to Item . . . . . 439394 HERSHEY KISSES 12 OZ
Limit to Warehouse . . . . .          Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . . From          To
Limit to User Code #1 . . . . . User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description                                Total      Total      Total      On
          Demanded      Selected      Avail      Order
5 439394 HERSHEY KISSES 12 OZ                    8.00        .00      114        0

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export

```

3. Press <Enter>. The Pre-book Demand For Item screen appears with a list of pre-book orders in order by the item's ship date.

```

CVKVDFR   DISPLAY Creative Data Research, Inc.           4/22/09 14:00:12
                Pre-book Demand for Item

Item 439394 HERSHEY KISSES 12 OZ                      Deal Type:

Position to Ship Date          Limit to Pre-book#
Limit to Customer .
Limit to User Code#1

Type options, press Enter.
2=Edit Line  S=Select/Unselect for Export
? Ship  Order / Line  Customer                                Qty  U/M
  Date
  42209      7      2 BIG JOHN'S QUICK STOP #1                    2   2 CSE
  42209      8      2 JR FOOD MART - ABITA                          2   2 CSE
  42209      9      2 BIG P MINI MART                                          2   2 CSE
  42209     10      2 DANNY & CLYDE'S FOOD STORE #20                       2   2 CSE

F2=Global Tools  F3=Exit  F4=Search  F5=Reload  F6=Access Date  F8=Export

```

When working with the Pre-book Demand For Item screen, the following fields at the top of the screen can be used to locate pre-book orders for the item in the screen's list:

- **Position to Ship Date** redisplay the list beginning with orders having the designated ship date.
- **Limit to Pre-book#** limits the list to include only orders based on the designated default.
- **Limit to Customer** limits the list to include only orders of the designated customer.
- **Limit to User Code#1** limits the list to include only orders for which the designated value is assigned.

4. Enter S (Select/Unselect for Export) in the selection column next to the ship date of all the necessary customers, and press <Enter>. An asterisk appears next to the ship dates.

```

CVKVDFR   DISPLAY Creative Data Research, Inc.           4/22/09 14:01:35
              Pre-book Demand for Item

Item 439394 HERSHEY KISSES 12 OZ                      Deal Type:

Position to Ship Date          Limit to Pre-book#
Limit to Customer .
Limit to User Code#1

Type options, press Enter.
2=Edit Line S=Select/Unselect for Export
? Ship Order / Line Customer                      Qty U/M
  Date
* 42209      7      2 BIG JOHN'S QUICK STOP #1      2  2 CSE
* 42209      8      2 JR FOOD MART - ABITA          2  2 CSE
* 42209      9      2 BIG P MINI MART              2  2 CSE
* 42209     10      2 DANNY & CLYDE'S FOOD STORE #20  2  2 CSE

F2=Global Tools F3=Exit F4=Search F5=Reload F6=Access Date F8=Export

```

5. If necessary, press <F6> (Access Date) to change the ship date for pre-book orders.
6. Press <F3> to exit. The Work With Pre-book Items screen appears.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           4/22/09 14:03:11
              Work with Pre-book Items

Position to Item . . . . . 439394 HERSHEY KISSES 12 OZ
Limit to Warehouse . . . . .          Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . From      To
Limit to User Code #1 . . . User Code #2      Include Exported? N (Y/N)

S=Select All U=Unselect All A=Select Available 5=Details
? Item Description                      Total Total Total On
                                     Demanded Selected Avail Order
439394 HERSHEY KISSES 12 OZ              8.00      8.00  114    0

F2=Global Tools F3=Exit F5=Refresh F8=Export

```

7. Repeat the previous steps as necessary to continue selecting items.
8. Press <F8> to begin exporting orders. The Prompt For Export screen appears with a list of the pre-book orders currently selected for exporting.

```

CVKRDFR   DISPLAY Creative Data Research, Inc.           4/22/09 14:03:3
              Prompt for Export

Position to Customer
Position to Order #
-----U=Unselect
Customer / Count / Route
Order Line Item Qty Description Date
JR FOOD MART - ABITA / 1 Lines / 210
8 2 439394 2 HERSHEY KISSES 12 OZ 2009-04-2
BIG JOHN'S QUICK STOP #1 / 1 Lines /
7 2 439394 2 HERSHEY KISSES 12 OZ 2009-04-2
BIG P MINI MART / 1 Lines / 500
9 2 439394 2 HERSHEY KISSES 12 OZ 2009-04-2
DANNY & CLYDE'S FOOD STORE #20 / 1 Lines / 400
10 2 439394 2 HERSHEY KISSES 12 OZ 2009-04-2

F2=Glb Tools F3=Exit F4=Search F5=Refresh F6=Print F7=Options F10=Export

```

9. Use the following fields at the top of the screen (use <Page Down> if necessary) to review the selected pre-book orders:
 - **Position To Customer** redisplay the screen's list beginning with the designated customer. If necessary, press <F4> to select an item from the Select Customer Master screen.
 - **Position to Order #** redisplay the screen's list beginning with the designated pre-book order. If necessary, press <F4> to select an item from the Select Pre-book Order screen.
10. To *unselect* a pre-book order, locate the order in the screen's list, enter *U* in the selection column next to the customer name, and press <Enter>.
11. To print a detailed report (see below) of the selected pre-book orders before exporting the orders, press <F6> (Print).
12. If necessary, press <F7> (Options) to review or change the export options. Refer to Working With Export Options above for additional information.
13. Press <F10> (Export) to export the pre-book orders as new *Pick* type customer orders. The Work With Pre-book Items screen appears.

If necessary, refer to Working With Remote Orders of the Billing document for information about processing pre-book orders which appear on the Work With Remote Orders screen before they are uploaded by the user to appear as "live" orders on the Work With Orders screens.

Print Pre-book Orders

Creative Data Research, Inc.		Print Pre-book Orders		JEANNINE	CVNCPFR	4/22/09 14:04:19	Page	1
Order #	Customer	Ship Date Deal						
Line #	Item	Qty	Unit Price	Unit Cost	Ship Date	U/M	Status	
7	260501 BIG JOHN'S QUICK STOP #1		4/24/09	0				
2	439394 HERSHEY KISSES 12 OZ	2	70.20	56.16	4/22/09	2	Selected	
8	100900 JR FOOD MART - ABITA		4/24/09	0				
2	439394 HERSHEY KISSES 12 OZ	2	70.20	56.16	4/22/09	2	Selected	
9	320001 BIG P MINI MART		4/24/09	0				
2	439394 HERSHEY KISSES 12 OZ	2	70.20	56.16	4/22/09	2	Selected	
10	800237 DANNY & CLYDE'S FOOD STORE #20		4/24/09	0				
2	439394 HERSHEY KISSES 12 OZ	2	70.20	56.16	4/22/09	2	Selected	
** END OF REPORT **								

Exporting The Orders Of Available Pre-booked Items

The following instructions describe using the Work With Pre-book Items screen to limit the export of orders when availability of pre-booked items is less than the demand.

1. Select option 2 (Work With Pre-book Items) from the Pre-book Orders screen. The Work With Pre-book Items screen appears with a list of all pending items.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           4/22/09 15:37:56
                Work with Pre-book Items

Position to Item . . . . .
Limit to Warehouse . . . . .      Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization .      (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . From      To
Limit to User Code #1 . . .      User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description                Total      Total      Total      On
                                Demanded   Selected   Avail      Order
439336  HERSHEY PLAIN GIANT BAR      28.00      .00        9          0
439394  HERSHEY KISSES 12 OZ         8.00      8.00     114         0

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export
  
```

2. To locate a specific item, use the **Position To Item** field as illustrated below (or <Page Down> if necessary). Users may press <F4> to select an item number from the Select Item By Description screen.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           4/22/09 15:40:56
                Work with Pre-book Items

Position to Item . . . . .      439336  HERSHEY PLAIN GIANT BAR
Limit to Warehouse . . . . .      Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization .      (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . From      To
Limit to User Code #1 . . .      User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description                Total      Total      Total      On
                                Demanded   Selected   Avail      Order
439336  HERSHEY PLAIN GIANT BAR      28.00      .00        9          0
439394  HERSHEY KISSES 12 OZ         8.00      8.00     114         0

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export
  
```

3. To select items based on availability, enter *A* (Select Available) in the selection column next to the desired item number.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           4/22/09 15:43:54
                Work with Pre-book Items

Position to Item . . . . . 439336 HERSHEY PLAIN GIANT BAR
Limit to Warehouse . . . . . Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . . From To
Limit to User Code #1 . . . . . User Code #2 Include Exported? N (Y/N)

S=Select All U=Unselect All A=Select Available 5=Details
? Item Description Total Total Total On
D Demanded Selected Avail Order
A 439336 HERSHEY PLAIN GIANT BAR 28.00 .00 9 0
A 439394 HERSHEY KISSES 12 OZ 8.00 .00 114 0

F2=Global Tools F3=Exit F5=Refresh F8=Export

```

4. Press <Enter>.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           4/22/09 15:44:38
                Work with Pre-book Items

Position to Item . . . . . 439336 HERSHEY PLAIN GIANT BAR
Limit to Warehouse . . . . . Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . . From To
Limit to User Code #1 . . . . . User Code #2 Include Exported? N (Y/N)

S=Select All U=Unselect All A=Select Available 5=Details
? Item Description Total Total Total On
D Demanded Selected Avail Order
439336 HERSHEY PLAIN GIANT BAR 28.00 8.00 9 0
439394 HERSHEY KISSES 12 OZ 8.00 8.00 114 0

F2=Global Tools F3=Exit F5=Refresh F8=Export
8 line(s) were changed.

```

5. To review the items selected, enter 5 (Details) in the selection column next to the desired item number, and press <Enter>. The Pre-book Demand For Item screen appears with an asterisk next to the ship date of selected items.

```

CVKVDFR   DISPLAY Creative Data Research, Inc.           4/22/09 15:45:55
                Pre-book Demand for Item

Item 439336 HERSHEY PLAIN GIANT BAR Deal Type:

Position to Ship Date Limit to Pre-book#
Limit to Customer .
Limit to User Code#1

Type options, press Enter.
2=Edit Line S=Select/Unselect for Export
? Ship Order / Line Customer Qty U/M
Date
* 42409 7 1 BIG JOHN'S QUICK STOP #1 2 2 BOX
* 42409 8 1 JR FOOD MART - ABITA 2 2 BOX
* 42409 9 1 BIG P MINI MART 2 2 BOX
* 42409 10 1 DANNY & CLYDE'S FOOD STORE #20 2 2 BOX
42409 11 1 EXPRESS WAY FOOD MART 20 2 BOX

F2=Global Tools F3=Exit F4=Search F5=Reload F6=Access Date F8=Export

```

To change the selection of a pre-booked item on a customer-by-customer basis, enter *S* (*Select/Unselect for Export*) in the selection column next to the desired item's ship date, and press <Enter>.

Press <F3> to exit. The Work With Pre-book Items screen appears.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           4/22/09 15:47:06
                Work with Pre-book Items

Position to Item . . . . . 439336 HERSHEY PLAIN GIANT BAR
Limit to Warehouse . . . . . Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . . From To
Limit to User Code #1 . . . . . User Code #2 Include Exported? N (Y/N)

S=Select All U=Unselect All A=Select Available 5=Details
? Item Description Total Total Total On
Demanded Selected Avail Order
439336 HERSHEY PLAIN GIANT BAR 28.00 8.00 9 0
439394 HERSHEY KISSES 12 OZ 8.00 8.00 114 0

F2=Global Tools F3=Exit F5=Refresh F8=Export

```

6. Repeat the previous steps as necessary to continue selecting items.
7. Press <F8> to begin exporting orders. The Prompt For Export screen appears with a list of the pre-book orders currently selected for exporting.

```

CVKRDFR   DISPLAY Creative Data Research, Inc.           4/22/09 15:47:20
                Prompt for Export

Position to Customer
Position to Order #
----- U=Unselect
Customer / Count / Route
Order Line Item Qty Description Date
JR FOOD MART - ABITA / 2 Lines / 210
8 1 439336 2 HERSHEY PLAIN GIANT BAR 2009-04-24
8 2 439394 2 HERSHEY KISSES 12 OZ 2009-04-22
BIG JOHN'S QUICK STOP #1 / 2 Lines /
7 1 439336 2 HERSHEY PLAIN GIANT BAR 2009-04-24
7 2 439394 2 HERSHEY KISSES 12 OZ 2009-04-22
BIG P MINI MART / 2 Lines / 500
9 1 439336 2 HERSHEY PLAIN GIANT BAR 2009-04-24
9 2 439394 2 HERSHEY KISSES 12 OZ 2009-04-22
DANNY & CLYDE'S FOOD STORE #20 / 2 Lines / 400
10 1 439336 2 HERSHEY PLAIN GIANT BAR 2009-04-24
10 2 439394 2 HERSHEY KISSES 12 OZ 2009-04-22

F2=Glb Tools F3=Exit F4=Search F5=Refresh F6=Print F7=Options F10=Export

```

8. Use the following fields at the top of the screen (use <Page Down> if necessary) to review the selected pre-book orders:
 - **Position To Customer** redisplay the screen's list beginning with the designated customer. If necessary, press <F4> to select an item from the Select Customer Master screen.
 - **Position to Order #** redisplay the screen's list beginning with the designated pre-book order. If necessary, press <F4> to select an item from the Select Pre-book Order screen.
9. To *unselect* a pre-book order, locate the order in the screen's list, enter *U* in the selection column next to the customer name, and press <Enter>.
10. To print a detailed report (see below) of the selected pre-book orders before exporting the orders, press <F6> (Print).

Print Pre-book Orders

Creative Data Research, Inc.		Print Pre-book Orders		JEANNINE	CVNCPFR	4/22/09 15:47:37	Page	1
Order #	Customer	Ship Date Deal						
Line #	Item	Qty	Unit Price	Unit Cost	Ship Date	U/M	Status	
7	260501 BIG JOHN'S QUICK STOP #1	4/24/09	0					
1	439336 HERSHEY PLAIN GIANT BAR	2	38.40	30.72	4/24/09	2	Selected	
2	439394 HERSHEY KISSES 12 OZ	2	70.20	56.16	4/22/09	2	Selected	
8	100900 JR FOOD MART - ABITA	4/24/09	0					
1	439336 HERSHEY PLAIN GIANT BAR	2	38.40	30.72	4/24/09	2	Selected	
2	439394 HERSHEY KISSES 12 OZ	2	70.20	56.16	4/22/09	2	Selected	
9	320001 BIG P MINI MART	4/24/09	0					
1	439336 HERSHEY PLAIN GIANT BAR	2	38.40	30.72	4/24/09	2	Selected	
2	439394 HERSHEY KISSES 12 OZ	2	70.20	56.16	4/22/09	2	Selected	
10	800237 DANNY & CLYDE'S FOOD STORE #20	4/24/09	0					
1	439336 HERSHEY PLAIN GIANT BAR	2	38.40	30.72	4/24/09	2	Selected	
2	439394 HERSHEY KISSES 12 OZ	2	70.20	56.16	4/22/09	2	Selected	

** END OF REPORT **

11. If necessary, press <F7> (Options) to review or change the export options. Refer to Working With Export Options above for additional information.
12. Press <F10> (Export) to export the pre-book orders as new *Pick* type customer orders. The Work With Pre-book Items screen appears.

If necessary, refer to Working With Remote Orders of the Billing document for information about processing pre-book orders which appear on the Work With Remote Orders screen before they are uploaded by the user to appear as “live” orders on the Work With Orders screens.

Working With Pre-book Order Creation Defaults

The following instructions describe using the Edit Pre-book Order Hdr Details screen to designate default values used when creating pre-book orders using option 1 (Work With Pre-book Orders) of the Pre-book Orders screen. The defaults can include ship date, warehouse, vendor deal, order header codes and invoice messages.

Pre-book order creation defaults are user-specific, and can be saved by a user when adding an order. Refer to Adding Pre-book Orders above for additional information. The following instructions describe saving the defaults by editing the header details of an existing order (with or without saving the details).

The **Create using saved defaults?** field does not appear on the Prompt Pre-book Order CRT screen for first-time users until after they save the default values. Refer to Adding Pre-book Orders above for additional information.

```

User: JEANNINE           Menu: PREBKCV1           Date: 8/20/08

===== > P R E - B O O K   O R D E R S <=====
=====
|||||||
THE    ||           1. Work With Pre-book Orders
DAC    ||           2. Work with Pre-book Items
SYSTEM ||           3. Purge Pre-book Orders
|||||||
|||||||           4. Print Pre-Book Orders
|||           5. Print Pre-Book Orders by Customer
|||           6. Pre-Book Report Menu
|||           7. Work with Pre-Book Defaults
|||           8. Create Pre-Book Orders from Defaults
|||           9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu      90. Sign Off

=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
Selection or command
===>

```

1. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of pre-book orders with *pending* (unexported) items.
2. If necessary, press <F7> (All) to include pre-book orders without pending items on the screen's list.

```

CVKGDFR  DISPLAY Creative Data Research, Inc.           8/20/08 10:40:24
                Work with Pre-Book Orders
Pre-book  Pre-book# Pre-book  Cust#  Vendor Deal#  W.H.  Deal  Code Code
Ship Date      Order No.          Code  Utilz  #1  #2
                                                    *ALL

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates

? Ship Dte      Cust                               Pbk  Code Code Pbk#
Order#          Order#                               #1  #2
10/01/08      320055 OCEAN SPRINGS QUICK STOP          85
9/30/08       770001 TEXAS TRUCK STOP              32
9/30/08       700180 L & M GROCERY                 42
9/30/08       99000 99 MART PLUS                   57
9/30/08       380120 MISS STOP N GO #120          59
9/25/08       800333 KINGS FOREST EXXON           43
9/20/08       380120 MISS STOP N GO #120          35
9/15/08       380110 MISS STOP N GO #110          34
9/15/08       380130 MISS STOP N GO #130          36
9/13/08       320033 KINGS GROCERY                44
                                                    20 +

F2=Global Tools  F3=Exit  F5=Refresh  F7=All  F8=Export  F10=Create

```

- If the header details of an existing order will be saved as the user's pre-book order creation defaults, use the restrictor fields at the top of the screen (use <Page Down> if necessary) to locate the desired order, enter 2 (Edit) in the selection column next to the order's ship date, and press <Enter>. The Edit Pre-book Order: DTE screen appears.
- If an existing order's header details will not be used, enter 2 (Edit) in the selection column next to any order's ship date, and press <Enter>. The Edit Pre-book Order: DTE screen appears.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/20/08 10:45:42
                Edit Pre-Book Order: DTE
Customer 320055 OCEAN SPRINGS QUICK STOP
Position Ship Date-->          Limit Item-->          Limit Order#-->      85
-----
Item      Qty      U/M      Pending  4  Exported  0 SHOW PENDING
S=Select/Unselect  D=Delete  Z=Edit Line Properties  M=Message

      Ord / Line Item      Qty U/M      Price      Extension
      Ship Date 100108 KEEBLER PECAN SANDIES 2 OZ      13.65      54.60
      85      4 561161      4 2 BOX
      Ship Date 100108 KEEBLER FUDGE STRIPE COOKIES 11.50Z      15.45      61.80
      85      3 631127      4 2 BAG
      Ship Date 100108 KEEBLER CLUB CRACKER 5.25 OZ      11.30      45.20
      85      2 561759      4 2 BOX
      Ship Date 100108 KEEBLER CHIPS DELUXE 20Z      3.45      34.50
      85      1 561158      10 2 CTN
      Ship Date 100108 KEEBLER CHIPS DELUXE 20Z

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

- Press <F10> (Hdr). The Edit Pre-book Order Hdr Details screen appears.

```

CVVKE1R   CHANGE Creative Data Research, Inc.           8/20/08 10:47:22
                Edit Pre-Book Order Hdr Details

Pre-Book Order Number      85
Customer Number . . : 320055 OCEAN SPRINGS QUICK STOP

Status 1 Open              Creation Date 8/19/08 Creation Time 17:17:50

Defaults for new detail lines:

Ship Date . . . . . 100108
Warehouse Code . . . 1      MAIN WAREHOUSE
Deal Utilization . . S (S=Standard, T=Show, X=None)
Deal Number . . . . . 21 Keebler Standard Booking
User Code #1 . . . .
User Code #2 . . . .

Special Message 1 . Keebler Standard Booking
Special Message 2 .
Special Message 3 .

F3=Cancel & Exit F4=Search F9=Save as Default Enter=Update & Exit

```

- If necessary, enter a different date for the **Ship Date** (6,n) field, or blank it out. The default ship date can be overridden using the **Ship Date** field on the Prompt Pre-book Order CRT screen when adding a pre-book order. Refer to Adding Pre-book Orders above for additional information.
- If necessary, enter a different code for the **Warehouse Code** (6,a) field. With the cursor positioned in the **Warehouse Code** field, users may press <F4> to select a warehouse code from the Select Warehouse Master screen.

8. If special pricing of the order's items will be used, enter one of the following values for the **Deal Utilization** field; otherwise, enter *X* to designate that no special pricing is used:
 - *S* (Standard) for pricing the order's items according to a standard booking vendor deal.
 - *T* (Show) for pricing the order's items according to a trade show booking vendor deal.
9. If *S* or *T* is entered for the **Deal Utilization** field, enter the vendor deal number for the **Deal Number** (6,n) field. Users may press <F4> to select the deal number from the Select Deal For Pre-book Order screen.

```

CVVKE1R  CHANGE  Creative Data Research, Inc.      8/20/08 11:18:07
                        Edit Pre-Book Order Hdr Details

Pre-Book Order Number      85
Customer Number . . : 320055 OCEAN SPRINGS QUICK STOP

Status 1 Open                Creation Date  8/19/08 Creation Time 17:17:50

Defaults for new detail lines:

Ship Date . . . . . 090208
Warehouse Code . . . 1      MAIN WAREHOUSE
Deal Utilization . . . S (S=Standard, T=Show, X=None)
Deal Number . . . . . 21  Keebler Standard Booking
User Code #1 . . . .
User Code #2 . . . .

Special Message 1 . . Keebler Standard Booking
Special Message 2 .
Special Message 3 .

F3=Cancel & Exit  F4=Search  F9=Save as Default  Enter=Update & Exit

```

10. If necessary, enter a two-character value for one or both of the **User Code #1** and **User Code #2** (2,a) fields. The values can be used to work with various pre-book order screens, such as the Pre-book Global Tools and Release Pre-books. If necessary, users may press <F4> to select a previously defined code from the Select Order Header Codes screen. Refer to Working With Order Header Codes of the Billing File Maintenance document for additional information.
11. Enter data as necessary for the following fields:

- **Special Message 1** (30,a) - a message which is printed at the top of the order's invoice under the *Delivery Message* heading.

Refer to Working With Export Options above for information about automatically appending this message to all the items of a new prebook order.

- **Special Message 2** (30,a) - a message which is printed at the top of the order's invoice under the *Special Message* heading.
- **Special Message 3** (30,a) - a message which is printed below the list of ordered items on the invoice.

If a code was entered for the **Account Type** field of the customer's record, the message of the corresponding **Account Type Message** field overrides

the message entered for the **Special Message 3** field. Refer to Working With Account Types of the Customer File Maintenance document for additional information.

Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document for information about creating invoice messages that are printed on every customer's invoices.

12. Press <F9> (Save as Default) to save this order's header details as the user's pre-book order creation default values.
13. To save the order header details for the current order, press <Enter> (Update & Exit) and Press <Enter> when prompted to confirm; otherwise, press <F3> (Cancel & Exit). The Edit Pre-book Order: DTE screen appears.
14. Press <F3> to exit. The Work With Pre-book Orders screen appears.

Editing Pre-book Orders and Pending Items

After pre-book orders are entered, the step-by-step instructions below can be used to:

- Add items to and delete items from a pre-book order.
- Change the ship date of an item.
- Change all the ship dates of an order's items.
- Change the order quantity and unit of measure of a item.
- Change the pricing of items.
- Globally replace an item with another item.
- Change the header information of a pre-book order, such as ship date, warehouse, vendor deal, order header codes and invoice messages.

Adding Items To A Pre-book Order

```

User: JEANNINE           Menu: PREBKCV1           Date: 8/15/08

===== > P R E - B O O K   O R D E R S <=====
=====
|||||||
THE  ||           1. Work With Pre-book Orders
DAC  ||           2. Work with Pre-book Items
SYSTEM ||         3. Purge Pre-book Orders
|||||||
|||||||           4. Print Pre-Book Orders
|||              5. Print Pre-Book Orders by Customer
|||              6. Pre-Book Report Menu
|||              7. Work with Pre-Book Defaults
|||              8. Create Pre-Book Orders from Defaults
|||              9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu      90. Sign Off
=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
Selection or command
===>

```

1. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of pre-book orders with *pending* (unexported) items.
2. If necessary, press <F7> (All) to include pre-book orders without pending items on the screen's list.

```

CVKGDFR   DISPLAY Creative Data Research, Inc.           8/15/08 16:42:09
                Work with Pre-Book Orders
Pre-book# Pre-book# Pre-book  Cust#  Vendor Deal#  W.H. Deal  Code Code
Ship Date  Order No.           Code Utilz  #1  #2
*ALL

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates

? Ship Dte    Cust                                Pbk    Code Code Pbk#
Order#       #1  #2

9/30/08  770001 TEXAS TRUCK STOP                32                2014
9/30/08  700180 L & M GROCERY                    42                2014
9/30/08  99000 99 MART PLUS                      57                2014
9/30/08  380120 MISS STOP N GO #120             59                2014
9/25/08  800333 KINGS FOREST EXXON              43                2014
9/20/08  380120 MISS STOP N GO #120             35                2014
9/15/08  380110 MISS STOP N GO #110             34                2014
9/15/08  380130 MISS STOP N GO #130             36                2014
9/13/08  320033 KINGS GROCERY                   44                2014
9/12/08  320033 KINGS GROCERY                    40                20 +

F2=Global Tools  F3=Exit  F5=Refresh  F7=All  F8=Export  F10=Create

```

- Use the restrictor fields at the top of the screen (use <Page Down> if necessary) to locate the desired pre-book order, enter 2 (Edit) in the selection column next to the order's ship date, and press <Enter>. The Edit Pre-book Order: DTE screen appears with the order's pending items listed in order by ship date.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/15/08 16:43:07
                Edit Pre-Book Order: DTE
Customer  700180 L & M GROCERY
Position  Ship Date-->          Limit Item-->          Limit Order#-->    42
-----
Item      Qty      U/M      Pending  1  Exported  1  SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item  Qty  U/M      Price      Extension
      42   1  770130    4  2  EA      6.82      27.28
Ship Date 80108  BLACKJACK FULL FLAVOR 16OZ

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

- If necessary, press <F7> (All) to include exported items on the screen's list.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/15/08 16:43:29
                Edit Pre-Book Order: DTE
Customer  700180 L & M GROCERY
Position  Ship Date-->          Limit Item-->          Limit Order#-->    42
-----
Item      Qty      U/M      Pending  1  Exported  1  SHOW ALL
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item  Qty  U/M      Price      Extension
      42   2  561158    8  2  CTN      3.65      29.20
Ship Date 80108  KEEBLER CHIPS DELUXE 2OZ
      42   1  770130    4  2  EA      6.82      27.28
Ship Date 80108  BLACKJACK FULL FLAVOR 16OZ

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

- To access a different pre-book order for the same customer, press <F6> (Access) to enter the order's number for the **Limit Order#** field, and press <Enter>. If necessary, press <F4> to select an order from the Select Order For Customer screen.

The Edit Pre-book Order: DTE screen is redisplayed, as illustrated below, with the designated order.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/15/08 16:45:50
                Edit Pre-Book Order: DTE
Customer 700180 L & M GROCERY
Position Ship Date-->          Limit Item-->          Limit Order#-->          29
-----
Item      Qty      U/M      Pending  4  Exported  0  SHOW ALL
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item      Qty  U/M      Price      Extension
      29      4  113200  10  2  CTN      29.46      294.60
Ship Date 81808  MARLBORO 100 BOX
      29      3  631127  10  2  BAG      15.45      154.50
Ship Date 81808  KEEBLER FUDGE STRIPE COOKIES 11.5OZ
      29      2  802680  2  2  EA      16.88      33.76
Ship Date 81808  BIC LIGHTER COMFORT LITE
      29      1  439336  10  2  BOX      38.40      384.00
Ship Date 81808  HERSHEY PLAIN GIANT BAR

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

When working with the Edit Pre-book Order: DTE screen, the following fields at the top of the screen can be used to locate items in the screen's list:

- **Position Ship Date** redisplay the list beginning with the pre-book orders which have the designated ship date.
- **Limit Item** limits the list to the designated item. If necessary, press <F4> to select an item from the Select Item By Description screen.

6. To add an item to the pre-book order, enter data for the following fields, and press <Enter> when data entry is complete:

- **Item** (6,n) - the item number of the product which the customer is ordering. If necessary, press <F4> to select an item number from the Select Item By Description screen.
- **Qty** (8,n) - the quantity of the item being ordered.
- **Optional: U/M** (1,n) - the selling level (unit of measure) of the item. Valid values are 1, 2, 3 or 4. If no value is entered, the item's standard selling level is ordered.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/15/08 16:47:41
                Edit Pre-Book Order: DTE
Customer 700180 L & M GROCERY
Position Ship Date-->          Limit Item-->          Limit Order#-->          29
-----
Item      Qty      U/M      Pending  5  Exported  0  SHOW ALL
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item      Qty  U/M      Price      Extension
      29      5  902400  10  2  EA      .63      6.30
Ship Date 81808  BIC CLASSIC MED BLACK 2PK
      29      4  113200  10  2  CTN      29.46      294.60
Ship Date 81808  MARLBORO 100 BOX
      29      3  631127  10  2  BAG      15.45      154.50
Ship Date 81808  KEEBLER FUDGE STRIPE COOKIES 11.5OZ
      29      2  802680  2  2  EA      16.88      33.76
Ship Date 81808  BIC LIGHTER COMFORT LITE
      29      1  439336  10  2  BOX      38.40      384.00
Ship Date 81808  HERSHEY PLAIN GIANT BAR

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

As items are added to the pre-book order, the pricing which appears for each item is based on the customer's current pricing, and a vendor deal's pricing if one is utilized. Refer to Adding Pre-book Orders above for additional information.

7. If necessary, enter a value for the **Ship Date** (6,n) field to change the expected ship date of the item.

Note: As items are added to the pre-book order, the default ship date can be changed by using <F10> (Hdr) of the Edit Pre-Book Order: DTE screen.

8. Repeat the previous steps to continue adding items to the pre-book order, and press <F3> (Exit) when data entry is complete. The Work With Pre-book Orders screen appears.

Deleting Items From A Pre-book Order

```

User: JEANNINE           Menu: PREBKCV1           Date: 8/07/08

===== > P R E - B O O K   O R D E R S < =====
=====
|||||||
THE    ||           1. Work With Pre-book Orders
DAC    ||           2. Work with Pre-book Items
SYSTEM ||           3. Purge Pre-book Orders
|||||||
|||||||           4. Print Pre-Book Orders
|||           5. Print Pre-Book Orders by Customer
||           6. Pre-Book Report Menu
||           7. Work with Pre-Book Defaults
||           8. Create Pre-Book Orders from Defaults
||           9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu      90. Sign Off

=====
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Selection or command
==>

```

1. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of pre-book orders with *pending* (unexported) items.

```

CVKGDFFR  DISPLAY Creative Data Research, Inc.           8/07/08 12:14:33
Work with Pre-Book Orders
Pre-book  Pre-book# Pre-book  Cust#  Vendor Deal#  W.H. Deal  Code Code
Ship Date      Order No.      Code  Utilz  #1  #2
                                           OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates

? Ship Dte      Cust                               Pbk   Code Code Pbk#
Order#         #1  #2
8/03/08  100850 EXPRESS WAY FOOD MART           33
8/03/08  380110 MISS STOP N GO #110           34
8/03/08  380120 MISS STOP N GO #120           35
8/03/08  380130 MISS STOP N GO #130           36
8/03/08  990000 99 MART PLUS                   57
8/02/08  770001 TEXAS TRUCK STOP                 32
8/01/08  320092 LIL SHORT STOP - OCEAN SPRINGS  28
8/01/08  700180 L & M GROCERY                   29
8/01/08  100802 CRANKY CORNER QUICK STOP       38
8/01/08  100855 GAS-N-SHOP #6                   39
                                           20 +

F2=Global Tools  F3=Exit  F5=Refresh  F7=All  F8=Export  F10=Create

```

2. Use the restrictor fields at the top of the screen (use <Page Down> if necessary) to locate the desired pre-book order, enter 2 (Edit) in the selection column next to the order's ship date, and press <Enter>. The Edit Pre-book Order: DTE screen appears with the order's pending items.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/07/08 12:21:25
                Edit Pre-Book Order: DTE
Customer 380110 MISS STOP N GO #110
Position Ship Date-->          Limit Item-->          Limit Order#-->    58
-----
Item      Qty      U/M      Pending      5 Exported      1 SHOW PENDING
S=Select/Unselect  D=Delete      2=Edit Line Properties      M=Message

      Ord / Line Item      Qty U/M      Price      Extension
      Ship Date 80108  HERSHEY PLAIN GIANT BAR      38.40      1536.00
      58      1 439336  40 2 BOX
      Ship Date 80808  HERSHEY MINIATURES 12 OZ      70.20      140.40
      58      6 439393  2 2 CS
      Ship Date 80808  HERSHEY MINIATURES 12 OZ      15.45      154.50
      58      3 631127  10 2 BAG
      Ship Date 80808  KEEBLER FUDGE STRIPE COOKIES 11.5OZ      .63      1.26
      58      5 902400  2 2 EA
      Ship Date 81408  BIC CLASSIC MED BLACK 2PK      16.88      33.76
      58      2 802680  2 2 EA
      Ship Date 83008  BIC LIGHTER COMFORT LITE

```

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

- If necessary, enter the desired item's number in the **Limit Item** field, and press <Enter> to limit the list to the desired pre-booked item.
- Enter *D* (Delete) in the selection column next to the item's order number.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/07/08 12:21:25
                Edit Pre-Book Order: DTE
Customer 380110 MISS STOP N GO #110
Position Ship Date-->          Limit Item-->          Limit Order#-->    58
-----
Item      Qty      U/M      Pending      5 Exported      1 SHOW PENDING
S=Select/Unselect  D=Delete      2=Edit Line Properties      M=Message

      Ord / Line Item      Qty U/M      Price      Extension
D      Ship Date 80108  HERSHEY PLAIN GIANT BAR      38.40      1536.00
      58      1 439336  40 2 BOX
      Ship Date 80808  HERSHEY MINIATURES 12 OZ      70.20      140.40
      58      6 439393  2 2 CS
      Ship Date 80808  HERSHEY MINIATURES 12 OZ      15.45      154.50
      58      3 631127  10 2 BAG
      Ship Date 80808  KEEBLER FUDGE STRIPE COOKIES 11.5OZ      .63      1.26
      58      5 902400  2 2 EA
      Ship Date 81408  BIC CLASSIC MED BLACK 2PK      16.88      33.76
      58      2 802680  2 2 EA
      Ship Date 83008  BIC LIGHTER COMFORT LITE

```

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

- Press <Enter> to remove the item from the screen's list.
- Repeat the previous steps to continue deleting items from the pre-book order, and press <F3> (Exit) when data entry is complete. The Work With Pre-book Orders screen appears.

Changing A Pre-book Order's Header Details

The following instructions describe using the Edit Pre-book Order Hdr Details screen to change pre-book order information such as ship date, warehouse, vendor deal, order header codes and invoice messages.

The use of the Work With Pre-book Orders screen to locate the desired order is described below, but the Work With Pre-book Items screen can also be used to locate the order.

```

User: JEANNINE           Menu: PREBKCV1           Date: 8/20/08

===== > P R E - B O O K   O R D E R S <=====
=====
|||||||
THE    ||           1. Work With Pre-book Orders
DAC    ||           2. Work with Pre-book Items
SYSTEM ||           3. Purge Pre-book Orders
|||||||

4. Print Pre-Book Orders
5. Print Pre-Book Orders by Customer
6. Pre-Book Report Menu
7. Work with Pre-Book Defaults
8. Create Pre-Book Orders from Defaults
9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu           90. Sign Off
=====
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Selection or command
==>>

```

1. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of pre-book orders with *pending* (unexported) items.

```

CVKGDFR  DISPLAY Creative Data Research, Inc.           8/20/08 16:29:49
                Work with Pre-Book Orders
Pre-book# Pre-book# Pre-book  Cust#  Vendor Deal#  W.H. Deal Code Code
Ship Date Order No.         Code Utilz #1 #2
                OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates

? Ship Dte      Cust                                Pbk      Code Code Pbk#
Order#         #1 #2
10/01/08  320055 OCEAN SPRINGS QUICK STOP           85
9/30/08   700180 L & M GROCERY                 42           2014
9/30/08   99000  99 MART PLUS                       57
9/30/08   380120 MISS STOP N GO #120           59
9/25/08   800333 KINGS FOREST EXXON            43           2014
9/20/08   380120 MISS STOP N GO #120           35           2014
9/15/08   380110 MISS STOP N GO #110           34           2014
9/15/08   380130 MISS STOP N GO #130           36           2014
9/13/08   320033 KINGS GROCERY                 44           2014
9/12/08   320033 KINGS GROCERY                 40           20 +

F2=Global Tools  F3=Exit  F5=Refresh  F7=All  F8=Export  F10=Create

```

2. Use the restrictor fields at the top of the screen (use <Page Down> if necessary) to locate the desired order, enter 2 (Edit) in the selection column next to the order's ship date, and press <Enter>. The Edit Pre-book Order: DTE screen appears with the order's pending items listed in order by ship date.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/20/08 16:45:46
                Edit Pre-Book Order: DTE
Customer  380130 MISS STOP N GO #130
Position  Ship Date-->          Limit Item-->          Limit Order#-->    36
-----
Item      Qty      U/M    Pending  1 Exported  0 SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item    Qty U/M    Price      Extension
      36   1  770130    4  2  EA     6.82      27.28
Ship Date 91508  BLACKJACK FULL FLAVOR 16OZ

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

- To access a different pre-book order for the same customer, press <F6> (Access) to enter the order's number for the **Limit Order#** field, and press <Enter>. If necessary, press <F4> to select an order from the Select Order For Customer screen.

The Edit Pre-book Order: DTE screen is redisplayed, as illustrated below, with the designated order.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/20/08 16:46:17
                Edit Pre-Book Order: DTE
Customer  380130 MISS STOP N GO #130
Position  Ship Date-->          Limit Item-->          Limit Order#-->    60
-----
Item      Qty      U/M    Pending  4 Exported  1 SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item    Qty U/M    Price      Extension
      60   5  902026    2  2  EA     1.39      2.78
Ship Date 91208  BIC RED CRYSTAL
      60   3  631127   10  2  BAG     15.45     154.50
Ship Date 91208  KEEBLER FUDGE STRIPE COOKIES 11.5OZ
      60   2  802680    2  2  EA     16.88     33.76
Ship Date 91208  BIC LIGHTER COMFORT LITE
      60   1  439336   10  2  BOX     38.40    384.00
Ship Date 91208  HERSHEY PLAIN GIANT BAR

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

- Press <F10> (Hdr). The Edit Pre-book Order Hdr Details screen appears.

```

CVVKE1R   CHANGE Creative Data Research, Inc.           8/20/08 17:00:33
                Edit Pre-Book Order Hdr Details

Pre-Book Order Number      60
Customer Number . . : 380130 MISS STOP N GO #130

Status 1 Open              Creation Date  8/16/07 Creation Time 15:06:08

Defaults for new detail lines:

Ship Date . . . . . 91208
Warehouse Code . . . 1      MAIN WAREHOUSE
Deal Utilization . . X (S=Standard, T=Show, X=None)
Deal Number . . . . .
User Code #1 . . . . .
User Code #2 . . . . .

Special Message 1 .
Special Message 2 .
Special Message 3 .

F3=Cancel & Exit F4=Search F9=Save as Default Enter=Update & Exit

```

5. If necessary, enter a different date for the **Ship Date** (6,n) field. This date will be used as the default ship date of any item added to the order after this date is changed.
6. If necessary, enter a different code for the **Warehouse Code** (6,a) field. With the cursor positioned in the **Warehouse Code** field, users may press <F4> to select a warehouse code from the Select Warehouse Master screen.
7. If necessary, enter one of the following for the **Deal Utilization** field:
 - *S* (Standard) designates that a standard booking vendor deal is used for pricing the order's items.
 - *T* (Show) designates that a trade show booking vendor deal is used for pricing the order's items.
 - *X* (None) designates that no vendor deal pricing is used.
8. If necessary, enter a vendor deal number for the **Deal Number** (6,n) field. Users may press <F4> to select the deal number from the Select Deal For Pre-book Order screen.

Note: Only the pricing of items added to the order *after* entering or changing the value for the **Deal Number** field is affected.

9. If necessary, enter a two-character value for one or both of the **User Code #1** and **User Code #2** (2,a) fields. The values can be used to work with various pre-book order screens, such as the Pre-book Global Tools and Release Pre-books. If necessary, users may press <F4> to select a previously defined code from the Select Order Header Codes screen. Refer to Working With Order Header Codes of the Billing File Maintenance document for additional information.
10. Enter data as necessary for the following fields:
 - **Special Message 1** (30,a) - a message which is printed at the top of the order's invoice under the *Delivery Message* heading.

Refer to Working With Export Options above for information about automatically appending this message to all the items of a new prebook order.

- **Special Message 2** (30,a) - a message which is printed at the top of the order's invoice under the *Special Message* heading.
- **Special Message 3** (30,a) - a message which is printed below the list of ordered items on the invoice.

If a code was entered for the **Account Type** field of the customer's record, the message of the corresponding **Account Type Message** field overrides the message entered for the **Special Message 3** field. Refer to Working With Account Types of the Customer File Maintenance document for additional information.

Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document for information about creating invoice messages that are printed on every customer's invoices.

11. Press <Enter> (Update & Exit) and Press <Enter> when prompted to confirm. The Edit Pre-book Order: DTE screen appears.
12. Press <F3> to exit. The Work With Pre-book Orders screen appears.

Changing A Pending Item's Ship Date

The instructions below describe using the Pre-book Demand For Item screen to change the ship date of a pending item for one or more customers' pre-book orders.

Refer to Using Work With Pre-book Orders To Export for information about using the Pre-book Global Tools screen to globally change the ship date of one or more pending items using various criteria.

```

User: JEANNINE           Menu: PREBKCV1           Date: 8/07/08

===== > P R E - B O O K   O R D E R S < =====
=====
|||||||
THE    ||                1. Work With Pre-book Orders
DAC    ||                2. Work with Pre-book Items
SYSTEM||                3. Purge Pre-book Orders
|||||||
|||||||                4. Print Pre-Book Orders
|||                    5. Print Pre-Book Orders by Customer
|||                    6. Pre-Book Report Menu
|||                    7. Work with Pre-Book Defaults
|||                    8. Create Pre-Book Orders from Defaults
|||                    9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu      90. Sign Off

=====
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Selection or command
==>

```

1. Select option 2 (Work With Pre-book Items) from the Pre-book Orders screen. The Work With Pre-book Items screen appears with a list of all pending items.

```

CVL2DFR  DISPLAY Creative Data Research, Inc.      8/07/08 16:16:45
          Work with Pre-book Items

Position to Item . . . . .
Limit to Warehouse . . . . .          Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . .    (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . From      To
Limit to User Code #1 . . .          User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description              Total      Total      Total      On
                               Demanded   Selected   Avail      Order
108300 B&H MENT 100 LT          5.00      .00      276      0
113200 MARLBORO 100 BOX         10.00     .00      201      0
439336 HERSHEY PLAIN GIANT BAR  80.00     .00      32       0
439393 HERSHEY MINIATURES 12 OZ  2.00      .00      2000     0
561158 KEEBLER CHIPS DELUXE 2OZ  4.00      .00      1242     0
631127 KEEBLER FUDGE STRIPE COOKIES 11.50  90.00     .00      15       0
770130 BLACKJACK FULL FLAVOR 16OZ 44.00     .00      3886     +

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export

```

2. To locate a specific item, use the **Position To Item** field as illustrated below (or <Page Down> if necessary). Users may press <F4> to select an item number from the Select Item By Description screen.

Refer to Using Work With Pre-book Items To Export for information about using the qualifying fields at the top of the Work With Pre-book Items screen to locate an item.

```

CVL2DFR  DISPLAY Creative Data Research, Inc. 8/07/08 16:19:50
                Work with Pre-book Items

Position to Item . . . . . 631127 KEEBLER FUDGE STRIPE COOKIES 11.5OZ
Limit to Warehouse . . . . . Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . From To
Limit to User Code #1 . . . User Code #2 Include Exported? N (Y/N)

S=Select All U=Unselect All A=Select Available 5=Details
? Item Description Total Total Total On
Demanded Selected Avail Order

631127 KEEBLER FUDGE STRIPE COOKIES 11.5O 90.00 .00 15 0
770130 BLACKJACK FULL FLAVOR 16OZ 44.00 .00 3886 0
802662 BIC LIGHTER MINI CLASSIC 3PK 1.00 .00 1313 0
802680 BIC LIGHTER COMFORT LITE 18.00 .00 1714 0
902400 BIC CLASSIC MED BLACK 2PK 16.00 .00 0 0

F2=Global Tools F3=Exit F5=Refresh F8=Export

```

3. Enter 5 (Details) in the selection column next to the desired item's number, and press <Enter>. The Pre-book Demand For Item screen appears with a list of all the customers requesting the item in order by ship date.

```

CVKVDFR  DISPLAY Creative Data Research, Inc. 8/07/08 16:22:30
                Pre-book Demand for Item

Item 631127 KEEBLER FUDGE STRIPE COOKIES 11.5OZ Deal Type:

Position to Ship Date Limit to Pre-book#
Limit to Customer .
Limit to User Code#1

Type options, press Enter.
2=Edit Line S=Select/Unselect for Export
? Ship Order / Line Customer Qty U/M
Date
73008 50 3 USA CONVENIENCE STORE #200 10 2 BAG
73008 51 3 USA CONVENIENCE STORE #300 10 2 BAG
73008 52 3 USA CONVENIENCE STORE #400 10 2 BAG
73008 53 3 USA CONVENIENCE STORE #500 10 2 BAG
73008 54 3 USA CONVENIENCE STORE #600 10 2 BAG
80108 29 3 L & M GROCERY 10 2 BAG
80108 59 3 MISS STOP N GO #120 10 2 BAG
80108 60 3 MISS STOP N GO #130 10 2 BAG +

F2=Global Tools F3=Exit F4=Search F5=Reload F6=Access Date F8=Export

```

When working with the Pre-book Demand For Item screen, the following fields at the top of the screen can be used to locate pre-book orders for the item in the screen's list:

- **Position to Ship Date** redisplay the list beginning with orders having the designated ship date.
- **Limit to Pre-book#** limits the list to include only orders based on the designated default.
- **Limit to Customer** limits the list to include only orders of the designated customer.
- **Limit to User Code#1** limits the list to include only orders for which the designated value is assigned.

4. Press <F6> (Access Date) to edit the **Ship Date** (6,n) fields of one or more of the pre-book orders on the Pre-book Demand For Item screen.

Note: The ship date of a single pre-booked item can be changed by entering 2 (Edit Line) in the selection column next to the desired pre-book order, pressing <Enter>, and editing the **Ship Date** (6,n) field on the Edit/View Line Details screen illustrated below.

```

CVKPE1R  CHANGE  Creative Data Research, Inc.      8/15/08  9:31:02
                                Edit/View Line Details
Pre-book   Line   Customer
Order Number Number
      29         3   700180 L & M GROCERY

Type changes, press Enter.

Item Number . 631127 KEEBLER FUDGE STRIPE COOKIES 11.50Z
Warehouse Code 1  MAIN WAREHOUSE
Qty . . . . . 10
U/M . . . . . 2 BAG

Unit Price . :      15.45
Extension . :      154.50

Ship Date . . 80108
Deal Utilization T (S=Standard, T=Show, X=None)

F2=Unlock Price  F3=Exit  F4=Prompt  F7=Update & Exit

```

Press <F7> (Update & Exit) and <Enter> when prompted to confirm. The Pre-book Demand For Item screen appears.

```

CVKVDFR  DISPLAY Creative Data Research, Inc.      8/15/08  9:48:22
                                Pre-book Demand for Item

Item 631127 KEEBLER FUDGE STRIPE COOKIES 11.50Z      Deal Type:

Position to Ship Date      Limit to Pre-book#
Limit to Customer .
Limit to User Code#1

Type options, press Enter.
2=Edit Line  S=Select/Unselect for Export

?  Ship  Order / Line  Customer      Qty  U/M
   Date
73008  50    3 USA CONVENIENCE STORE #200      10  2  BAG
73008  51    3 USA CONVENIENCE STORE #300      10  2  BAG
73008  52    3 USA CONVENIENCE STORE #400      10  2  BAG
73008  53    3 USA CONVENIENCE STORE #500      10  2  BAG
73008  54    3 USA CONVENIENCE STORE #600      10  2  BAG
80108  29    3 L & M GROCERY                          10  2  BAG
80108  59    3 MISS STOP N GO #120                   10  2  BAG
80108  60    3 MISS STOP N GO #130                   10  2  BAG

F2=Global Tools  F3=Exit  F4=Search  F5=Reload  F6=Access Date  F8=Export

```

Press <F5> (Reload) to refresh the Pre-book Demand For Items screen.

```

CVKVDFR  DISPLAY Creative Data Research, Inc.      8/15/08  9:50:46
                                Pre-book Demand for Item

Item 631127 KEEBLER FUDGE STRIPE COOKIES 11.50Z      Deal Type:

Position to Ship Date      Limit to Pre-book#
Limit to Customer .
Limit to User Code#1

Type options, press Enter.
2=Edit Line  S=Select/Unselect for Export

?  Ship  Order / Line  Customer      Qty  U/M
   Date
73008  50    3 USA CONVENIENCE STORE #200      10  2  BAG
73008  51    3 USA CONVENIENCE STORE #300      10  2  BAG
73008  52    3 USA CONVENIENCE STORE #400      10  2  BAG
73008  53    3 USA CONVENIENCE STORE #500      10  2  BAG
73008  54    3 USA CONVENIENCE STORE #600      10  2  BAG
80108  59    3 MISS STOP N GO #120                   10  2  BAG
80108  60    3 MISS STOP N GO #130                   10  2  BAG
81508  29    3 L & M GROCERY                          10  2  BAG

F2=Global Tools  F3=Exit  F4=Search  F5=Reload  F6=Access Date  F8=Export

```

5. Repeat the previous steps to continue changing ship dates of the pending item, and press <F3> (Exit) when data entry is complete. The Work With Pre-book Items screen appears.

Changing The Ship Date Of All An Order's Items

The instructions below describe changing the ship date of all the pending items of a pre-book order by using the order's default ship date to globally change all the item's ship dates to a single date.

Refer to Using Work With Pre-book Orders To Export for information about using the Pre-book Global Tools screen to globally change the ship date of one or more pending items using various criteria.

```

User: JEANNINE           Menu: PREBKCV1           Date: 8/15/08

===== > P R E - B O O K   O R D E R S <=====
=====
|||||||
THE    ||           1. Work With Pre-book Orders
DAC    ||           2. Work with Pre-book Items
SYSTEM ||           3. Purge Pre-book Orders
|||||||

                               4. Print Pre-Book Orders
                               5. Print Pre-Book Orders by Customer
                               6. Pre-Book Report Menu
                               7. Work with Pre-Book Defaults
                               8. Create Pre-Book Orders from Defaults
                               9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu           90. Sign Off
=====
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Selection or command
===>

```

1. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of previously entered pre-book orders in reverse order by ship date.

```

CVKGDFR   DISPLAY Creative Data Research, Inc.           8/15/08 13:01:09
                               Work with Pre-Book Orders
Pre-book  Pre-book# Pre-book  Cust#  Vendor Deal#  W.H.  Deal  Code Code
Ship Date      Order No.              Code  Utilz  #1  #2
                                           OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates

? Ship Dte      Cust                               Pbk      Code Code Pbk#
                               Order#   #1  #2

8/11/08  100850 EXPRESS WAY FOOD MART           65
8/03/08  100850 EXPRESS WAY FOOD MART           33          2014
8/03/08  380110 MISS STOP N GO #110             34          2014
8/03/08  380120 MISS STOP N GO #120             35          2014
8/03/08  380130 MISS STOP N GO #130             36          2014
8/03/08  99000  99 MART PLUS                          57
8/02/08  770001 TEXAS TRUCK STOP                   32          2014
8/01/08  700180 L & M GROCERY                       29
8/01/08  100802 CRANKY CORNER QUICK STOP          38          2014
8/01/08  100855 GAS-N-SHOP #6                     39          20 +

F2=Global Tools  F3=Exit  F5=Refresh  F7=All  F8=Export  F10=Create

```

2. Use the restrictor fields at the top of the screen (use <Page Down> if necessary) to locate the desired pre-book order, and enter 2 (Edit) in the selection column next to the order's ship date.

```

CVKGDFR   DISPLAY Creative Data Research, Inc.           8/15/08 13:08:29
                Work with Pre-Book Orders
Pre-book# Pre-book# Pre-book# Cust# Vendor Deal# W.H. Deal Code Code
Ship Date      Order No.      Code Utilz #1 #2
                OPEN

2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available
R=Reset Dates

? Ship Dte      Cust                                Pbk      Code Code Pbk#
                Order# #1 #2
      8/11/08    100850 EXPRESS WAY FOOD MART                65
      8/03/08    100850 EXPRESS WAY FOOD MART                33                2014
      8/03/08    380110 MISS STOP N GO #110                 34                2014
      8/03/08    380120 MISS STOP N GO #120                 35                2014
      8/03/08    380130 MISS STOP N GO #130                 36                2014
      8/03/08    99000  99 MART PLUS                          57
      8/02/08    770001 TEXAS TRUCK STOP                     32                2014
2 8/01/08    700180 L & M GROCERY                        29
      8/01/08    100802 CRANKY CORNER QUICK STOP            38                2014
      8/01/08    100855 GAS-N-SHOP #6                       39                20 +

F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create

```

3. Press <Enter>. The Edit Pre-book Order: DTE screen appears.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/15/08 13:09:09
                Edit Pre-Book Order: DTE
Customer 700180 L & M GROCERY
Position Ship Date-->      Limit Item-->      Limit Order#-->      29
-----
Item      Qty      U/M      Pending      4 Exported      0 SHOW PENDING
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message

      Ord / Line Item      Qty U/M      Price      Extension
      29      4 113200 10 2 CTN      29.46      294.60
Ship Date 80108 MARLBORO 100 BOX
      29      2 802680 2 2 EA      16.88      33.76
Ship Date 80108 BIC LIGHTER COMFORT LITE
      29      1 439336 10 2 BOX      38.40      384.00
Ship Date 80408 HERSHEY PLAIN GIANT BAR
      29      3 631127 10 2 BAG      15.45      154.50
Ship Date 81508 KEEBLER FUDGE STRIPE COOKIES 11.50Z

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

4. Press <F10> (Hdr). The Edit Pre-book Order Hdr Details screen appears.

```

CVVKE1R   CHANGE Creative Data Research, Inc.           8/15/08 13:10:36
                Edit Pre-Book Order Hdr Details

Pre-Book Order Number      29
Customer Number . : 700180 L & M GROCERY

Status 1 Open              Creation Date 8/16/07 Creation Time 15:06:08

Defaults for new detail lines:

Ship Date . . . . . 80108
Warehouse Code . . . 1      MAIN WAREHOUSE
Deal Utilization . . T (S=Standard, T=Show, X=None)
Deal Number . . . . .
User Code #1 . . . . .
User Code #2 . . . . .

Special Message 1 .
Special Message 2 .
Special Message 3 .

F3=Cancel & Exit F4=Search F9=Save as Default Enter=Update & Exit

```

5. Enter the desired ship date in the **Ship Date** (6,n) field, and press <Enter>.

```

CVVKE1R  CHANGE  Creative Data Research, Inc.      8/15/08 13:22:19
                        Edit Pre-Book Order Hdr Details

Pre-Book Order Number      29
Customer Number . . :    700180 L & M GROCERY

Status 1 Open                Creation Date  8/16/07 Creation Time 15:06:08

Defaults for new detail lines:

Ship Date . . . . .      81808
Warehouse Code . . . . 1      MAIN WAREHOUSE
Deal Utilization . . . . T (S=Standard, T=Show, X=None)
Deal Number . . . . .
User Code #1 . . . . .
User Code #2 . . . . .

Special Message 1 .
Special Message 2 .
Special Message 3 .

F3=Cancel & Exit  F4=Search  F9=Save as Default  Enter=Update & Exit
                                           CONFIRM: Y (Y/N)

```

6. Press <Enter> to confirm. The Edit Pre-book Order: DTE screen appears.

```

CVVLDFR  DISPLAY  Creative Data Research, Inc.      8/15/08 13:23:58
                        Edit Pre-Book Order: DTE
Customer 700180 L & M GROCERY
Position Ship Date-->          Limit Item-->          Limit Order#-->          29
-----
Item      Qty      U/M      Pending      4      Exported      0      SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item      Qty U/M      Price      Extension
      29      4      113200      10 2 CTN      29.46      294.60
Ship Date 80108 MARLBORO 100 BOX
      29      2      802680      2 2 EA      16.88      33.76
Ship Date 80108 BIC LIGHTER COMFORT LITE
      29      1      439336      10 2 BOX      38.40      384.00
Ship Date 80408 HERSHEY PLAIN GIANT BAR
      29      3      631127      10 2 BAG      15.45      154.50
Ship Date 81508 KEEBLER FUDGE STRIPE COOKIES 11.50Z

F2=Glb Tools  F3=Exit  F5=Refresh  F6=Access  F7=All  F8=Export  F10=Hdr

```

7. Press <F3> (Exit). The Work With Pre-book Orders screen appears.

```

CVKGDFR  DISPLAY  Creative Data Research, Inc.      8/15/08 13:25:25
                        Work with Pre-Book Orders
Pre-book Pre-book# Pre-book Cust# Vendor Deal# W.H. Deal Code Code
Ship Date Order No. Code Utilz #1 #2
                                           OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates

? Ship Dte      Cust                                           Pbk      Code Code Pbk#
Order#      #1      #2

8/18/08      700180 L & M GROCERY                                           29
8/11/08      100850 EXPRESS WAY FOOD MART                                           65
8/03/08      100850 EXPRESS WAY FOOD MART                                           33      2014
8/03/08      380110 MISS STOP N GO #110                                           34      2014
8/03/08      380120 MISS STOP N GO #120                                           35      2014
8/03/08      380130 MISS STOP N GO #130                                           36      2014
8/03/08      99000 99 MART PLUS                                           57
8/02/08      770001 TEXAS TRUCK STOP                                           32      2014
8/01/08      100802 CRANKY CORNER QUICK STOP                                           38      2014
8/01/08      100855 GAS-N-SHOP #6                                           39      20 +

F2=Global Tools  F3=Exit  F5=Refresh  F7=All  F8=Export  F10=Create

```

8. Locate the pre-book order in the screen's list, and enter *R* (Reset Dates) in the selection column next to the order's ship date, and press <Enter>.

```

CVKGDFR   DISPLAY Creative Data Research, Inc.           8/15/08 13:25:25
                Work with Pre-Book Orders
Pre-book# Pre-book# Pre-book# Cust# Vendor Deal# W.H. Deal Code Code
Ship Date      Order No.                Code Utilz #1 #2
                OPEN

2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available
R=Reset Dates

? Ship Dte      Cust                                Pbk      Code Code Pbk#
                Order# #1 #2
R 8/18/08      700180 L & M GROCERY                            29
8/11/08      100850 EXPRESS WAY FOOD MART                    65
8/03/08      100850 EXPRESS WAY FOOD MART                    33          2014
8/03/08      380110 MISS STOP N GO #110                      34          2014
8/03/08      380120 MISS STOP N GO #120                      35          2014
8/03/08      380130 MISS STOP N GO #130                      36          2014
8/03/08      99000 99 MART PLUS                              57
8/02/08      770001 TEXAS TRUCK STOP                          32          2014
8/01/08      100802 CRANKY CORNER QUICK STOP                 38          2014
8/01/08      100855 GAS-N-SHOP #6                            39          20 +

F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create

```

9. Enter *Y* (yes) to confirm when the *Are you sure you want to reset the dates of these pre-book orders?* message appears, and press <Enter>.

```

CVKGDFR   DISPLAY Creative Data Research, Inc.           8/15/08 13:50:30
                Work with Pre-Book Orders
Pre-book# Pre-book# Pre-book# Cust# Vendor Deal# W.H. Deal Code Code
Ship Date      Order No.                Code Utilz #1 #2
                OPEN

2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available
R=Reset Dates

? Ship Dte      Cust                                Pbk      Code Code Pbk#
                Order# #1 #2
8/18/08      700180 L & M GROCERY                            29
8/11/08      100850 EXPRESS WAY FOOD MART                    65
8/03/08      100850 EXPRESS WAY FOOD MART                    33          2014
8/03/08      380110 MISS STOP N GO #110                      34          2014
8/03/08      380120 MISS STOP N GO #120                      35          2014
8/03/08      380130 MISS STOP N GO #130                      36          2014
8/03/08      99000 99 MART PLUS                              57
8/02/08      770001 TEXAS TRUCK STOP                          32          2014
8/01/08      100802 CRANKY CORNER QUICK STOP                 38          2014
8/01/08      100855 GAS-N-SHOP #6                            39          20 +

F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create
Date reset completed.

```

The *Date reset completed* message appears.

10. Repeat the previous steps to continue changing ship dates, and press <F3> (Exit) when data entry is complete. The Pre-book Orders screen appears.

Changing Quantity and U/M Of A Pending Item

The following instructions describe using the Edit/View Line Details screen to change the order quantity, unit of measure and other details of a pre-booked item. The use of the Work With Pre-book Items screen to locate the desired item is described below, but the Work With Pre-book Orders screen can also be used to locate the item.

```

User: JEANNINE          Menu: PREBKCV1          Date: 8/18/08
=====
> P R E - B O O K   O R D E R S <=====
=====
|||||
THE  || 1. Work With Pre-book Orders
DAC  || 2. Work with Pre-book Items
SYSTEM || 3. Purge Pre-book Orders
|||||
||||| 4. Print Pre-Book Orders
||||| 5. Print Pre-Book Orders by Customer
||||| 6. Pre-Book Report Menu
||||| 7. Work with Pre-Book Defaults
||||| 8. Create Pre-Book Orders from Defaults
||||| 9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing          20. Billing Files Maint.  21. Billing Reports
22. Remote Orders  23. Dac Main Menu      90. Sign Off
=====
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Selection or command
====>

```

1. Select option 2 (Work With Pre-book Items) from the Pre-book Orders screen. The Work With Pre-book Items screen appears.

```

CVL2DFR  DISPLAY Creative Data Research, Inc.          8/18/08 10:15:37
          Work with Pre-book Items

Position to Item . . . . .
Limit to Warehouse . . . . .          Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . From      To
Limit to User Code #1 . . . . .      User Code #2      Include Exported? N (Y/N)

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item  Description              Total      Total      Total      On
                               Demanded   Selected   Avail      Order
113200  MARLBORO 100 BOX          10.00     .00       201       0
439336  HERSHEY PLAIN GIANT BAR      80.00     .00       32        0
561158  KEEBLER CHIPS DELUXE 2OZ    4.00     .00      1242       0
631127  KEEBLER FUDGE STRIPE COOKIES 11.50    80.00     .00        5        0
770130  BLACKJACK FULL FLAVOR 16OZ    56.00     .00      3886       0
802680  BIC LIGHTER COMFORT LITE     16.00     .00      1710       0
902026  BIC RED CRYSTAL              14.00     .00       657       +

F2=Global Tools  F3=Exit  F5=Refresh  F8=Export

```

2. To locate a specific item, use the **Position To Item** field as illustrated below (or <Page Down> if necessary). Users may press <F4> to select an item number from the Select Item By Description screen.

Refer to Using Work With Pre-book Items To Export for information about using the qualifying fields at the top of the Work With Pre-book Items screen to locate an item.

```

CVL2DFR   DISPLAY Creative Data Research, Inc.           8/18/08 14:56:59
                Work with Pre-book Items

Position to Item . . . . . 802680 BIC LIGHTER COMFORT LITE
Limit to Warehouse . . . . . Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . . . From To
Limit to User Code #1 . . . . . User Code #2 Include Exported? N (Y/N)

S=Select All U=Unselect All A=Select Available 5=Details
? Item Description Total Total Total On
  Demanded Selected Avail Order
802680 BIC LIGHTER COMFORT LITE 16.00 .00 1710 0
902026 BIC RED CHRYSTAL 14.00 .00 657 0
902400 BIC CLASSIC MED BLACK 2PK 10.00 .00 0 0
930030 CAPTAIN BLACK GOLD POUCH 4.00 .00 766 0

F2=Global Tools F3=Exit F5=Refresh F8=Export

```

3. Enter 5 (Details) in the selection column next to the desired item's number, and press <Enter>. The Pre-book Demand For Item screen appears with a list of all the customers requesting the item in order by ship date.

```

CVKVDFR   DISPLAY Creative Data Research, Inc.           8/18/08 14:57:55
                Pre-book Demand for Item

Item 802680 BIC LIGHTER COMFORT LITE Deal Type:

Position to Ship Date Limit to Pre-book#
Limit to Customer .
Limit to User Code#1

Type options, press Enter.
2=Edit Line S=Select/Unselect for Export
? Ship Order / Line Customer Qty U/M
  Date
81808 29 2 L & M GROCERY 2 2 EA
82508 50 2 USA CONVENIENCE STORE #200 2 2 EA
82508 51 2 USA CONVENIENCE STORE #300 2 2 EA
82508 52 2 USA CONVENIENCE STORE #400 2 2 EA
82508 53 2 USA CONVENIENCE STORE #500 2 2 EA
82508 54 2 USA CONVENIENCE STORE #600 2 2 EA
91208 60 2 MISS STOP N GO #130 2 2 EA
93008 59 2 MISS STOP N GO #120 2 2 EA

F2=Global Tools F3=Exit F4=Search F5=Reload F6=Access Date F8=Export

```

When working with the Pre-book Demand For Item screen, the following fields at the top of the screen can be used to locate pre-book orders for the item in the screen's list:

- **Position to Ship Date** redisplay the list beginning with orders having the designated ship date.
- **Limit to Pre-book#** limits the list to include only orders based on the designated default.
- **Limit to Customer** limits the list to include only orders of the designated customer.
- **Limit to User Code#1** limits the list to include only orders for which the designated value is assigned.

4. Enter 2 (Edit Line) in the selection column next to the ship date of the desired order.

```

CVKVDFR   DISPLAY Creative Data Research, Inc.           8/18/08 14:57:55
              Pre-book Demand for Item

Item 802680 BIC LIGHTER COMFORT LITE                    Deal Type:

Position to Ship Date          Limit to Pre-book#
Limit to Customer .
Limit to User Code#1

Type options, press Enter.
2=Edit Line S=Select/Unselect for Export
? Ship Order / Line Customer                               Qty U/M
Date
2  81808 29 2 L & M GROCERY                               2 2 EA
  82508 50 2 USA CONVENIENCE STORE #200                 2 2 EA
  82508 51 2 USA CONVENIENCE STORE #300                 2 2 EA
  82508 52 2 USA CONVENIENCE STORE #400                 2 2 EA
  82508 53 2 USA CONVENIENCE STORE #500                 2 2 EA
  82508 54 2 USA CONVENIENCE STORE #600                 2 2 EA
  91208 60 2 MISS STOP N GO #130                       2 2 EA
  93008 59 2 MISS STOP N GO #120                       2 2 EA

F2=Global Tools F3=Exit F4=Search F5=Reload F6=Access Date F8=Export

```

5. Press <Enter>. The Edit/View Line Details screen appears.

```

CVKPE1R   CHANGE Creative Data Research, Inc.           8/18/08 14:58:32
              Edit/View Line Details

Pre-book Line Customer
Order Number Number
      29      2 700180 L & M GROCERY

Type changes, press Enter.

Item Number . 802680 BIC LIGHTER COMFORT LITE
Warehouse Code 1 MAIN WAREHOUSE
Qty . . . . . 2
U/M . . . . . 2 EA

Unit Price . . 16.88
Extension . . 33.76

Ship Date . . 81808
Deal Utilization T (S=Standard, T=Show, X=None)

F2=Unlock Price F3=Exit F4=Prompt F7=Update & Exit

```

6. To change the order quantity, enter the new quantity for the **Qty** field, and press <Enter>. The calculation of the **Unit Price** and **Extension** fields are updated accordingly.
7. To change the unit of measure ordered, enter *1*, *2*, *3* or *4* for the **U/M** field, and press <Enter>. The calculation of the **Unit Price** and **Extension** fields are updated accordingly.
8. To make additional changes, enter data as necessary for the following fields:
 - **Item Number** (6,n) - the item number can be changed to replace the pending item. If necessary, press <F4> to select an item number from the Select Item By Description screen.
 - **Warehouse Code** (6,a) - the warehouse code can be changed. If necessary, press <F4> to select a warehouse code from the Select Warehouse Master screen.
 - **Ship Date** (6,n) - the expected ship date of the item can be changed.
 - **Deal Utilization** (1,a) - designate if the pending item is one for which the designated type of vendor deal applies (*S* = Standard or *T* = Show), or for which no vendor deal applies (*X* = None).

9. Press <F7> (Update & Exit) when changes are complete, and press <Enter> to confirm. The Pre-book Demand For Item screen appears.
10. Repeat the previous steps to continue changing pending item details, and press <F3> (Exit) when data entry is complete. The Work With Pre-book Items screen appears.

Overriding A Pending Item's Price

The following instructions describe using the Edit/View Line Details screen to override the price of a pre-booked item of a specific order. The system repricing that occurs when pre-book orders are exported will not affect prices designated by an override.

The use of the Work With Pre-book Orders screen to locate the desired item is described below, but the Work With Pre-book Items screen can also be used to locate the item.

```

User: JEANNINE           Menu: PREBKCV1           Date: 8/21/08

===== > P R E - B O O K   O R D E R S < =====
|||||||
THE  ||          1. Work With Pre-book Orders
DAC  ||          2. Work with Pre-book Items
SYSTEM ||        3. Purge Pre-book Orders
|||||||
|||||||          4. Print Pre-Book Orders
                    5. Print Pre-Book Orders by Customer
                    6. Pre-Book Report Menu
                    7. Work with Pre-Book Defaults
                    8. Create Pre-Book Orders from Defaults
                    9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing          20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu          90. Sign Off

=====
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Selection or command
====>

```

1. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of pre-book orders with *pending* (unexported) items.

```

CVKGDFR  DISPLAY Creative Data Research, Inc.           8/21/08 15:44:38
                    Work with Pre-Book Orders
Pre-book  Pre-book# Pre-book  Cust#  Vendor Deal#  W.H. Deal  Code Code
Ship Date      Order No.          Code  Utilz  #1  #2
                                           OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates

? Ship Dte      Cust                                Pbk      Code Code Pbk#
Order#         #1  #2
10/01/08      320055 OCEAN SPRINGS QUICK STOP          85
9/30/08       700180 L & M GROCERY                     42          2014
9/30/08       990000 99 MART PLUS                       57
9/30/08       380120 MISS STOP N GO #120              59
9/25/08       800333 KINGS FOREST EXXON              43          2014
9/20/08       380120 MISS STOP N GO #120              35          2014
9/15/08       380110 MISS STOP N GO #110              34          2014
9/15/08       380130 MISS STOP N GO #130              36          2014
9/13/08       320033 KINGS GROCERY                     44          2014
9/12/08       320033 KINGS GROCERY                     40          20 +

F2=Global Tools  F3=Exit  F5=Refresh  F7=All  F8=Export  F10=Create

```

2. Use the restrictor fields at the top of the screen (use <Page Down> if necessary) to locate the desired pre-book order, enter 2 (Edit) in the selection column next to the order's ship date, and press <Enter>. The Edit Pre-book Order: DTE screen appears with the order's pending items listed in order by ship date.

```

CVVLDFR      DISPLAY Creative Data Research, Inc.      8/21/08 15:48:47
              Edit Pre-Book Order: DTE
Customer 700180 L & M GROCERY
Position Ship Date-->          Limit Item-->          Limit Order#-->      42
-----
Item      Qty      U/M      Pending      2 Exported      1 SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item      Qty U/M      Price      Extension
      42   3   802662      2 3   CSE      27.12      54.24
Ship Date 93008 BIC LIGHTER MINI CLASSIC 3PK
      42   1   770130      4 2   EA      6.82      27.28
Ship Date 93008 BLACKJACK FULL FLAVOR 16OZ

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

- To access a different pre-book order for the same customer, press <F6> (Access) to enter the order's number for the **Limit Order#** field, and press <Enter>. If necessary, press <F4> to select an order from the Select Order For Customer screen.

The Edit Pre-book Order: DTE screen is redisplayed, as illustrated below, with the designated order.

```

CVVLDFR      DISPLAY Creative Data Research, Inc.      8/21/08 15:51:29
              Edit Pre-Book Order: DTE
Customer 700180 L & M GROCERY
Position Ship Date-->          Limit Item-->          Limit Order#-->      99
-----
Item      Qty      U/M      Pending      1 Exported      0 SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item      Qty U/M      Price      Extension
      99   1   561158      1 2   CTN      3.15      3.15
Ship Date 82108 KEEBLER CHIPS DELUXE 2OZ

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

When working with the Edit Pre-book Order: DTE screen, the following fields at the top of the screen can be used to locate items in the screen's list:

- **Position Ship Date** redisplay the list beginning with the pre-book orders which have the designated ship date.
- **Limit Item** limits the list to the designated item. If necessary, press <F4> to select an item from the Select Item By Description screen.

- Enter 2 (Edit Line Properties) in the selection column next to the desired item's order number, and press <Enter>. The Edit/View Line Details screen appears.

```

CVKPE1R  CHANGE  Creative Data Research, Inc.      8/21/08 15:54:41
                        Edit/View Line Details
Pre-book   Line   Customer
Order Number Number
      99         1   700180 L & M GROCERY

Type changes, press Enter.

Item Number . . 561158 KEEBLER CHIPS DELUXE 20Z
Warehouse Code 1   MAIN WAREHOUSE
Qty . . . . . 1
U/M . . . . . 2 CTN

Unit Price . . :      3.15
Extension . . :      3.15

Ship Date . . . 82108
Deal Utilization S (S=Standard, T=Show, X=None)

F2=Unlock Price  F3=Exit  F4=Prompt  F7=Update & Exit

```

5. Press <F2> (Unlock Price).
6. Enter the new price for the **Unit Price** field, and press <Field Exit>.
7. Press <Enter> to calculate the value appearing for the **Extension** field.

```

CVKPE1R  CHANGE  Creative Data Research, Inc.      8/21/08 15:56:30
                        Edit/View Line Details
Pre-book   Line   Customer
Order Number Number
      99         1   700180 L & M GROCERY

Type changes, press Enter.

Item Number . . 561158 KEEBLER CHIPS DELUXE 20Z
Warehouse Code 1   MAIN WAREHOUSE
Qty . . . . . 1
U/M . . . . . 2 CTN

Unit Price . . :      3.50
Extension . . :      3.50

Ship Date . . . 82108
Deal Utilization S (S=Standard, T=Show, X=None)

F2=Unlock Price  F3=Exit  F4=Prompt  F7=Update & Exit

```

8. Press <F7> (Update & Exit), and press <Enter> to confirm. The Edit Pre-book Order: DTE screen appears.

```

CVVLDFR   DISPLAY Creative Data Research, Inc.           8/21/08 15:56:51
              Edit Pre-Book Order: DTE
Customer 700180 L & M GROCERY
Position Ship Date-->          Limit Item-->          Limit Order#-->    99
-----
Item      Qty      U/M      Pending  1 Exported  0 SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message

      Ord / Line Item      Qty U/M      Price      Extension
      99   1  561158      1  2 CTN      3.50 <      3.50
Ship Date 82108  KEEBLER CHIPS DELUXE  2OZ

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

A “less than” character (<) appears highlighted in yellow next to the pending item’s price to designate that an override price is entered for the pre-booked item.

- Repeat the previous steps to continue changing prices, and press <F3> (Exit) when data entry is complete. The Work With Pre-book Orders screen appears.

Replacing Pending Items

The following instructions describe using the Pre-book Global Tools screen to globally replace a pending item.

```

User: JEANNINE           Menu: PREBKCV1           Date: 8/15/08

===== > P R E - B O O K   O R D E R S <=====
=====
|||||||
THE   ||           1. Work With Pre-book Orders
DAC   ||           2. Work with Pre-book Items
SYSTEM ||         3. Purge Pre-book Orders
|||||||
                                           4. Print Pre-Book Orders
                                           5. Print Pre-Book Orders by Customer
                                           6. Pre-Book Report Menu
                                           7. Work with Pre-Book Defaults
                                           8. Create Pre-Book Orders from Defaults
                                           9. Release Pre-Book Orders

M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu      90. Sign Off
=====
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Selection or command
==>

```

1. Select option 1 (Work With Pre-book Orders) or option 2 (Work With Pre-book Items) from the Pre-book Orders screen.
2. Press <F2> (Global Tools). The Pre-book Global Tools screen appears.

```

CVMHPVR  ENTER  Creative Data Research, Inc.           8/15/08 14:28:06
                    Pre-book Global Tools

Q U A L I F Y:
Pre-book Number . . . . .
Ship Date Range: From . . . . . to
Item . . . . .
Warehouse . . . . .
Vendor . . . . .
Deal # . . . . .
Customer . . . . .
Route Range: From . . . . . to . . . . . Primary must be in range? (Y/N)
CODE #1
CODE #2
Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Require pending order? . . . . . (P=Primary Route, A=Any, Blank=Not Req.)

C H A N G E:
Action . . . . . C (C=Change)
New Ship Date . . . . . (Blank means don't change)
New Item . . . . . (Blank means don't change)
Selected for Export (Y/N) (Blank means don't change)
F3=Exit F10=Perform Change F15=Copy Set of Prebook Orders

```

3. Enter the number of the pending items to be replaced for the **Item** (6,n) field.
4. If necessary, use one or more of the following fields to further qualify the pending items to be replaced:
 - **Pre-book Number** - the qualified items are those of pre-book orders based on the designated pre-book default. If necessary, press <F4> to select a pre-book default from the Select Prebook screen.
 - **Ship Date Range From and To** - the qualified items are those with a ship date which falls within the designated range of dates.

- **Warehouse** - the qualified items are those of the designated warehouse. If necessary, press <F4> to select a warehouse code from the Select Warehouse Master screen.
- **Vendor (6,a)** - the qualified items are those purchased from the designated vendor. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
- **Deal # (6,n)** - the qualified items are those to which the designated vendor deal applies. If necessary, press <F4> to select a vendor deal from the Select Deal screen.
- **Customer (6,n)** - the qualified items are those of the designated customer's pre-book orders. If necessary, press <F4> to select a customer number from the Select Customer Master screen.
- **Route Range From and To (6,a)** - the qualified items are those of pre-book orders for customers with routes which fall within the designated range of routes. If necessary, press <F4> to select routes from the Select Route Description screen.
- **CODE #1 and CODE #2 (2,a)** - the qualified items are those of pre-book orders for which the designated codes were entered for one or both the **User Code #1** and **User Code #2** fields when the orders were added. If necessary, press <F4> to select an order header code from the Select Order Header Code screen.

The names of these two fields, which appear as **CODE #1** and **CODE #2** in the screen above, are entered for the **Text For O.E. Code 1** and **Text For O.E. Code 2** fields of the SYS041 default system option. Refer to the DAC Default System Options document for additional information.

- **Deal Utilization (1,a)** - the qualified items are those for which the designated type of vendor deal applies (*S* = Standard or *T* = Show), or the items for which no vendor deal applies (*X* = None).
 - **Require available product?** - *Y* (yes) can be entered to limit the qualified items by availability.
 - **Require pending order?** - the qualified items are those pre-booked for customers for which "live" customer orders with an *Open* status also exist, and use the customer's primary delivery route (*P*) or use any route (*A*).
5. Enter *C* for the **Action** field.
 6. To change the ship date of the new items, enter a date for the **New Ship Date** field.

7. Enter the number of the new item for the **New Item (6,n)** field, and press <Enter>.

```

CVMHPVR  ENTER  Creative Data Research, Inc.      8/15/08 15:08:17
                    Pre-book Global Tools
Q U A L I F Y:
Pre-book Number . . . . .
Ship Date Range: From . . . . . to
Item . . . . . 902400 BIC CLASSIC MED BLACK 2PK
Warehouse . . . . .
Vendor . . . . .
Deal # . . . . .
Customer . . . . .
Route Range: From . . . . . to . . . . . Primary must be in range? (Y/N)
CODE #1
CODE #2
Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Require available product? (Y/N) Blank means ignore availability
Require pending order? . . (P=Primary Route, A=Any, Blank=Not Req.)

C H A N G E:
Action . . . . . C (C=Change)
New Ship Date . . . . . 81508 (Blank means don't change)
New Item . . . . . 902026 (Blank means don't change)
Selected for Export (Y/N) (Blank means don't change)
F3=Exit F10=Perform Change F15=Copy Set of Prebook Orders

```

8. Press <F10> (Perform Change), and press <Enter> when prompted to confirm.

```

CVL2DFR  DISPLAY Creative Data Research, Inc.      8/15/08 15:11:42
                    Work with Pre-book Items
Position to Item . . . . .
Limit to Warehouse . . . . . Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . . .
Limit to Deal Utilization . . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Date Range: . . . From . . . To . . .
Limit to User Code #1 . . . . User Code #2 . . . . Include Exported? N (Y/N)

S=Select All U=Unselect All A=Select Available 5=Details
? Item Description Total Total Total On
Demanded Selected Avail Order
113200 MARLBORO 100 BOX 10.00 .00 201 0
439336 HERSHEY PLAIN GIANT BAR 80.00 .00 32 0
561158 KEEBLER CHIPS DELUXE 2OZ 4.00 .00 1242 0
631127 KEEBLER FUDGE STRIPE COOKIES 11.50 80.00 .00 5 0
770130 BLACKJACK FULL FLAVOR 16OZ 52.00 .00 3886 0
802680 BIC LIGHTER COMFORT LITE 16.00 .00 1710 0
902026 BIC RED CHRYSTAL 14.00 .00 657 +

F2=Global Tools F3=Exit F5=Refresh F8=Export
7 line items were changed.

```

The # *line items were changed* message appears where # designates the number of items replaced.

9. Repeat the previous steps to continue replacing items, and press <F3> (Exit) when data entry is complete. The Pre-book Orders screen appears.

Copying Pre-book Orders

The step-by-step instructions below describe using the Work With Pre-book Orders application to add pre-book orders for one or more customers by copying an existing pre-book order.

```

User: JEANNINE          Menu: PREBKCV1          Date: 1/30/14

===== > P R E - B O O K   O R D E R S < =====
=====
|||||
THE  || 1. Work with Prebook Orders
DAC  || 2. Work with Prebook Items
SYSTEM || 3. Purge Prebook Orders
||||| 4. Print Prebook Orders
||||| 5. Print Prebook Orders by Customer
||||| 6. Prebook Reports Menu
||||| 7. Work with Prebook Defaults
||||| 8. Create Prebook Orders from Defaults
||||| 9. Release Prebook Orders
||||| 10. Import Prebook Orders
||||| 11. Reprice ALL Prebook Orders
          M E N U   C A L L S
19. Billing          20. Billing Files Maint.  21. Billing Reports
22. Remote Orders  23. Dac Main Menu          90. Sign Off
=====
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election or command
==>

```

1. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of previously entered pre-book orders in reverse order by ship date.

```

CVKGDFR  DISPLAY CDR Customer Conference          1/30/14 13:14:31
          Work with Pre-Book Orders
ShipDate PB ORD# PB#  Cust#  Vendor Deal#  Whs  Deal  Code Code
          Utilz #1 #2
-----
          OPEN
2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates  8=Reprice  Z=Zoom to Header
? Ship Dte  Cust          PB-Ord#  Cde1  Cde2  Pbk#
- 1/01/13  900300 USA CONVENIENCE STORE #300          47
- 2/26/13  100801 BARON EXPRESS #2 BP          71
- 3/01/13  320092 LIL SHORT STOP - OCEAN SPRINGS          75  M1  TN  200
- 3/08/13  380130 MISS STOP N GO #130          76  M1  TN  200
- 3/08/13  380130 MISS STOP N GO #130          77  M1  TN  200
- 3/08/13  380130 MISS STOP N GO #130          78  M1  TN  200
- 3/08/13  380130 MISS STOP N GO #130          79  M1  TN  200
- 3/08/13  380130 MISS STOP N GO #130          80  M1  TN  200
- 3/08/13  380130 MISS STOP N GO #130          81  M1  TN  200
- 3/08/13  380130 MISS STOP N GO #130          82  M1  TN  200
- 3/08/13  380130 MISS STOP N GO #130          83  M1  TN  200
- 4/25/13  99000 99 MART PLUS          86
          +
F1=W/Order F2=Global Tool F3=Exit F5=Refresh F7=All F8=Export F10=Create

```

2. Use the restrictor fields at the top of the screen (use <Page Down> if necessary) to locate the desired pre-book order, enter C (Copy) in the selection column next to the order's ship date and press <Enter>. The Prompt For Pre-book Copy screen appears.

```

DCI3PVR  ENTER  CDR Customer Conference  1/30/14 13:19:59
                Prompt for Pre-Book Copy

Type choices, press Enter.

Pre-Book Order Number      91

Pre-Book Ship Date . .    _____ (Blank to use date of copied order)

F3=Exit without copy  F10=Select Customers for Copy  Enter=Perform Copy

```

3. If necessary, enter a ship date for the **Pre-Book Ship Date** field (6,n).
4. Press <F10> (Select Customers for Copy). The Make Customer Selection screen appears with a list of previously added customers, or the *No data to display* message.

```

DMIBDFR  DISPLAY CDR Customer Conference  1/30/14 13:23:17
                Make Customer Selection

Copy Pre-booked Order # 91 to the following
customers: (Make Selections, press F3 for options)
Add Customer _____ Add Corporate _____
Type options, press Enter.
I=Include  E=Exclude  D=Delete

?
_ Customer: 320091 - LIL SHORT STOP - VANCLEVE

F3=Exit  F6=Add Collection  F7=Add Customers  F8=Add Corporate  F11=Clear

```

Any customer who was excluded when the Make Customer Selection screen was previously used to copy a pre-book order is displayed in a different color.

5. To copy the pre-book order for a previously excluded customer, enter *I* (Include) in the selection column next to the customer, and press <Enter>.
6. To exclude a customer when copying the pre-book order, either:
 - Enter *E* (Exclude) in the selection column next to customer, and press <Enter>, or
 - Enter *D* (Delete) in the selection column next to customer, and press <Enter> to remove the customer from the list.
7. To clear the entire list, press <F11> (Clear), enter *Y* (yes) to confirm when the *Are you sure you want to remove all the selections?* message appears, and press <Enter>.

8. To add customers to the screen's list, enter data for one of the following fields, and press <Enter>:
 - **Add Customer** (6,n) - a customer number. If necessary, press <F4> to select a number from the Select Customers screen.
 - **Add Corporate** (6,n) - a corporate number. If necessary, press <F4> to select a number from the Select Corporate Master screen.

```

DMIBDFR      DISPLAY CDR Customer Conference      1/30/14 13:29:17
                                Make Customer Selection

Copy Pre-booked Order # 91 to the following
customers: (Make Selections, press F3 for options)
Add Customer _____ Add Corporate _____
Type options, press Enter.
I=Include E=Exclude D=Delete

?
- Corporate: 380100 - MISSISSIPPI STOP N GO
- Customer: 500101 - UNION GROVE GROCERY

F3=Exit F6=Add Collection F7=Add Customers F8=Add Corporate F11=Clear

```

9. Repeat the previous step as necessary to continue adding customers to the list, or press one of the following to add multiple customers:
 - <F6> (Add Collection) to select a customer collection from the Work With Customer Collections screen. Refer to Working With Customer Collections of the Customer File Maintenance document for information about using the screen to create a collection.
 - <F7> (Add Customers) - to select multiple customers from the Select Customers screen.

```

DMIBDFR      DISPLAY CDR Customer Conference      1/30/14 13:29:17
                                Make Customer Selection

Copy Pre-booked Order # 91 to the following
customers: (Make Selections, press F3 for options)
Add Customer _____ Add Corporate _____
Type options, press Enter.
I=Include E=Exclude D=Delete

?
- Corporate: 380100 - MISSISSIPPI STOP N GO
- Corporate: 900100 - USA CONVENIENCE HEADQUARTERS
- Customer: 320091 - LIL SHORT STOP - VANCLEVE
- Customer: 500101 - UNION GROVE GROCERY
- Collection:Convenience Stores

F3=Exit F6=Add Collection F7=Add Customers F8=Add Corporate F11=Clear

```

10. Press <F3> when data entry is complete. The Prompt For Pre-book Copy screen appears.

```

DCI3PVR   ENTER   CDR Customer Conference           1/30/14 13:19:59
                        Prompt for Pre-Book Copy

Type choices, press Enter.

Pre-Book Order Number      91

Pre-Book Ship Date . . .  _22814 (Blank to use date of copied order)

F3=Exit without copy      F10=Select Customers for Copy      Enter=Perform Copy

```

11. Press <Enter> to perform the copy, and press <Enter> to confirm.
12. Enter one of the following when the *Do you wish to retain customer selections for possible future copy?* message appears:
 - *N* (no) to clear all the customers currently listed on the Make Customer Selection screen.
 - *Y* (yes) to maintain the customers currently listed on the Make Customer Selection screen.
13. Press <Enter>. The Work With Pre-book Orders screen appears.

```

CVKGDFFR   DISPLAY CDR Customer Conference           1/30/14 14:09:07
                        Work with Pre-Book Orders
ShipDate PB ORD# PB#   Cust#  Vendor Deal#   Whs   Deal Code Code
                        Utilz #1 #2
_22814   _____
2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates  8=Reprice  Z=Zoom to Header
? Ship Dte      Cust                                PB-Ord#  Cdel  Cde2  Pbk#
- 2/28/14      320091 LIL SHORT STOP - VANCLEVE                94
- 2/28/14      380100 MISSISSIPPI STOP N GO                    95
- 2/28/14      380110 MISS STOP N GO #110                      96
- 2/28/14      380120 MISS STOP N GO #120                      97
- 2/28/14      380130 MISS STOP N GO #130                      98
- 2/28/14      500101 UNION GROVE GROCERY                      99
- 2/28/14      900200 USA CONVENIENCE STORE #200              100
- 2/28/14      900300 USA CONVENIENCE STORE #300              101
- 2/28/14      900400 USA CONVENIENCE STORE #400              102
- 2/28/14      900500 USA CONVENIENCE STORE #500              103
- 2/28/14      900600 USA CONVENIENCE STORE #600              104

F1=W/Order  F2=Global Tool  F3=Exit   F5=Refresh  F7=All  F8=Export  F10=Create

```

14. Press <F3> to exit. The Pre-book Orders screen appears.

Working With Pre-book Defaults

The instructions which follow describe using *pre-book defaults* to add and export large numbers of pre-book orders for multiple customers.

Typically, these steps are followed when working with pre-book defaults:

Step 1: Use the Export Options screen to designate the criteria used for creating the customers' "live" orders. Refer to Working With Export Options above for additional information.

Step 2: Use the Work With Pre-book Defaults application (option 7 of the Pre-book Orders screen) to add a pre-book default. Refer to Adding Pre-book Defaults below for additional information.

Step 3: Use the Create Pre-book Orders From Defaults application (option 8 of the Pre-book Orders screen) to add duplicate orders for multiple customers. Refer to Adding Pre-book Orders With Pre-book Defaults below for additional information.

Step 4: When the items of pre-book orders have been received, use the Release Pre-books screen to *select* the pre-booked items for export, and the Prompt For Export screen to review and *export* the pre-book orders as new *Pick* type customer orders. Refer to Using Release Pre-books To Export Orders below for additional information.

Adding Pre-book Defaults

The step-by-step instructions below describe using the Work With Pre-book Master screen to enter a pre-book default of *pending* items.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.

```
User: JEANNINE           Menu: OTHCV1           Date: 10/09/09

===== > O T H E R   O P E R A T I O N S < =====
=====
|||||
THE  ||           1. Archive Functions
DAC  ||           2. Unitrac (PMSTARS Etc.)
SYSTEM ||         3. QDN Interface
|||||           4. E-Mail
|||||           5. Pre-Booked Order System
|||||           6. Fast Track Reporting
|||||           7. Hershey Reporting
|||||           8. DEA Allocation
|||||           9. PERCS Reporting
|||||          10. NTS/Victory Reporting
|||||          11. Red Bull Reporting
|||||          M E N U   C A L L S
19. Other Operations 2  20.                21. WAM/InfoMetrics
22.                23. Dac Main Menu    90. Sign Off
=====
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==>
```

2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```
User: JEANNINE           Menu: PREBKCV1        Date: 10/09/09

===== > P R E - B O O K   O R D E R S < =====
=====
|||||
THE  ||           1. Work With Pre-book Orders
DAC  ||           2. Work with Pre-book Items
SYSTEM ||         3. Purge Pre-book Orders
|||||           4. Print Pre-Book Orders
|||||           5. Print Pre-Book Orders by Customer
|||||           6. Pre-Book Report Menu
|||||           7. Work with Pre-Book Defaults
|||||           8. Create Pre-Book Orders from Defaults
|||||           9. Release Pre-Book Orders
|||||          M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu    90. Sign Off
=====
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Selection or command
====>
```

3. Select option 7 (Work With Pre-book Defaults) from the Pre-book Orders screen. The Work With Pre-book Master screen appears with a list of previously entered pre-book defaults, or the *No data to display* message.

```

GWM9DFR   DISPLAY CDR Customer Conference           10/12/09 13:31:22
                Work with Prebook Master
PB #   Deal#   Start   End   Group
Description

Type options, press Enter.
2=Edit  D=Delete  Z=Zoom Header  O=Orders Built  H=History
? PB #   Description                               Sts Grp
      101 Cig. Deal                                 A
Start  5/01/09 End 12/31/09 Deal#    21
10010 HERSHEY DEAL                                 A
Start  6/01/09 End 12/31/09 Deal#    29

F3=Exit  F4=Search  F10=Create  F15=Prebooked Items  F24=Links

```

4. Press <F10 (Create). The Pre-book Header Entry screen appears.

```

GWNBPVR   ENTER   CDR Customer Conference           10/12/09 13:31:53
                Pre-book Header Entry

Pre-book #
Start Date
End Date
Description

F3=Exit

```

5. Enter data for the following fields:

- **Pre-book #** (5,n) - a number for the pre-book default.
- **Start Date** (6,n) - the first day of the range of dates within which a customer order's ship date must fall for the items of the order to be priced according to the pricing set up for the pre-book default.
- **End Date** (6,n) - the last day of the range of dates within which a customer order's ship date must fall for the items of the order to be priced according to the pricing set up for the pre-book default.
- **Description** (35,n) - a description of the pre-book default.

```

GWNBPVR  ENTER  CDR Customer Conference      10/12/09 13:31:53
                Pre-book Header Entry

Pre-book # 2000
Start Date 100109
End Date 123109
Description
Keebler Special

F3=Exit

```

6. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Enter Pre-book Detail screen appears with the *No data to display* message.

```

GWN5DFR  DISPLAY CDR Customer Conference      10/12/09 13:34:13
                Enter Pre-Book Detail

Prebook# Item  Line
2000
Deal# 0

Type options, press Enter.
2=Edit D=Delete C=Copy

F3=Exit F4=Search
No data to display.

```

7. Enter an item number for the **Item** (6,n) field, and press <Enter>. If necessary, press <F4> to select an item number from the Select Item By Description screen. The Enter/Update Pre-book Dtl Details screen appears.

```

GWN6E1R  ADD  CDR Customer Conference      10/12/09 13:34:42
                Enter/Update Pre-Book Dtl Details

Prebook 2000 Line 1

Type changes, press Enter.
Item 561158 KEEBLER CHIPS DELUXE 2OZ Vendor KEE001

Pick Region B1 Sell Price Retail Price
Warehouse Location 3330 Items/Unit Retail Cost Price

Promotion Dollar Amount . Dist.Incentive
Promotion Cost Dollar Amount Salesrep Promo

Free Item Flag

Default Quantity

F3=Exit F5=Deal

```

8. Enter an amount for one of the following fields to set the billing price for the item:
 - **Sell Price** - a fixed amount designated as the customer's billing price for the item at the standard selling level (unit of measure). This price overrides any existing contracts, selling allowances, rebates, discounts and surcharges.
 - **Promotion Dollar** - an amount deducted from the customer's billing price for the item at the standard selling level (unit of measure). This amount is deducted after other pricing factors (contracts, selling allowances, rebates, discounts and surcharges) are calculated.

9. If necessary, enter an amount for one of the following fields to affect the cost of the item:
 - **Cost Price** - a fixed amount designated as the item's base cost. This amount overrides any base cost designated by an existing contract and selling allowance.
 - **Promotion Cost Dollar Amount** - an amount deducted from the item's net cost and base cost.

10. If necessary, enter values for the following fields:
 - **Retail Price** - the retail price for the item's standard selling level.
 - **Items/Unit Retail** - the number of units included in the retail price if more than one, such as 3 for \$.99.

12. If necessary, enter the amount for the **Dist.Incentive** field which is tracked for rebate to the distributor for each item sold at the standard selling level (unit of measure).

13. Enter *Y* (yes) for the **Free Item Flag** field if the item is free to the retailer.

14. If necessary, enter a number for the **Default Quantity** field to designate the order quantity of the item that will be automatically designated when the pre-book default is used to create a pre-book order.

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

GWN6E1R	ADD	CDR Customer Conference	10/12/09 13:37:13
Enter/Update Pre-Book Dtl Details			
Prebook	2000	Line	1
Type changes, press Enter.			
Item	561158	KEEBLER CHIPS DELUXE 2OZ	Vendor KEE001
Pick Region B1		Sell Price	Retail Price
Warehouse Location	3330	Items/Unit Retail	Cost Price
Promotion Dollar Amount	.	.35 Deal#	35 Dist.Incentive .35
Promotion Cost Dollar Amount			Salesrep Promo
Free Item Flag			
Default Quantity			
F3=Exit F5=Deal			
CONFIRM: Y (Y/N)			

16. Press <Enter> when prompted to confirm. The Enter Pre-book Detail screen appears.

```

GWN5DFR      DISPLAY CDR Customer Conference      10/12/09 13:39:03
                                Enter Pre-Book Detail
Prebook# Item  Line
2000                                Deal#    35

Type options, press Enter.
2=Edit D=Delete C=Copy
? Item  Description              Promo$   Price  Dist$  Slsmn$
 561158 KEEBLER CHIPS DELUXE 20Z          .35     .000   .35

F3=Exit F4=Search

```

17. If necessary, enter *C* (Copy) in the selection column next to an item and press <Enter> to use the Pre-book Item Copy screen to add an item.

```

GWN5DFR      DISPLAY CDR Customer Conference      10/12/09 14:04:29
                                Enter Pre-Book Detail
Prebook# Item  Line
2000                                Deal#    35

Type options, press Enter.
2=Edit D=Delete C=Copy
? Item  Description              Promo$   Price  Dist$  Slsmn$
C 561158 KEEBLER CHIPS DELUXE 20Z          .35     .000   .35

                                Prebook Item Copy

                                To Item: 561161

                                F3=Exit F4=Search

F3=Exit F4=Search

```

18. Repeat the previous steps to continue adding items to the pre-book default, and press <F3> (Exit) when data entry is complete.

Adding Pre-book Orders With Pre-book Defaults

The step-by-step instructions below describe using the Pre-book Order Creation screen to add duplicate orders for multiple customers using a pre-book default.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.

```
User: JEANNINE           Menu: OTHCV1           Date: 10/19/09
===== > O T H E R   O P E R A T I O N S < =====
|||||
THE  ||           1. Archive Functions
DAC  ||           2. Unitrac (PMSTARS Etc.)
SYSTEM ||         3. QDN Interface
|||||           4. E-Mail
|||           5. Pre-Booked Order System
||           6. Fast Track Reporting
||           7. Hershey Reporting
||           8. DEA Allocation
||           9. PERCS Reporting
||          10. NTS/Victory Reporting
||          11. Red Bull Reporting
||          M E N U   C A L L S
19. Other Operations 2   20.
22.                   23. Dac Main Menu       21. WAM/InfoMetrics
                               90. Sign Off
=====
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==>
```

2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```
User: JEANNINE           Menu: PREBKC1         Date: 10/19/09
===== > P R E - B O O K   O R D E R S < =====
|||||
THE  ||           1. Work With Pre-book Orders
DAC  ||           2. Work with Pre-book Items
SYSTEM ||         3. Purge Pre-book Orders
|||||           4. Print Pre-Book Orders
||           5. Print Pre-Book Orders by Customer
||           6. Pre-Book Report Menu
||           7. Work with Pre-Book Defaults
||           8. Create Pre-Book Orders from Defaults
||           9. Release Pre-Book Orders
||          M E N U   C A L L S
19. Billing              20. Billing Files Maint.  21. Billing Reports
22. Remote Orders      23. Dac Main Menu       90. Sign Off
=====
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Selection or command
==>
```

3. Select option 8 (Create Pre-book Orders From Defaults) from the Pre-book Orders screen. The Pre-book Order Creation screen appears.

```

GWOODFR      DISPLAY CDR Customer Conference      10/19/09 10:35:1
                Prebook Order Creation
Pre-book#      Ship Date      Pre-Book Order->
Cust#          Qty          Code #1      Code #2      Total      0
Item#          Qty          Code #1      Code #2      Items      0

Type options, press Enter.

```

4. Enter values for the following fields:
 - **Pre-book#** - the number of the pre-book default used for creating the pre-book orders.
 - **Ship Date** - the ship date of the pre-book orders.
5. Press <Enter>.

```

GWOODFR      DISPLAY CDR Customer Conference      10/19/09 10:35:55
                Prebook Order Creation
Pre-book# 2000 Ship Date 102009      Pre-Book Order->
Cust#          Qty          Code #1      Code #2      Total      10
Item#          Qty          Code #1      Code #2      Items      1

Type options, press Enter.

? Qty Item# Item Description      F
    561158 KEEBLER CHIPS DELUXE 2OZ
    10 561161 KEEBLER PECAN SANDIES 2 OZ

F3=Exit F4=Search F5=View Orders Built F10=Create Order

```

The items of the pre-book default appear with the default order quantities entered when the pre-book default was created.

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

```

GW00DFR   DISPLAY CDR Customer Conference           10/19/09 10:44:36
                                Prebook Order Creation
Pre-book#  2000 Ship Date 102009                    Pre-Book Order->
Cust#     700180 L & M GROCERY                        Total      10
Item#     Qty      Code #1   Code #2                Items      1

Type options, press Enter.

? Qty  Item#  Item Description                               F
      561158 KEEBLER CHIPS DELUXE  2OZ
      10 561161 KEEBLER PECAN SANDIES 2 OZ

F3=Exit  F4=Search  F5=View Orders Built  F10=Create Order

```

7. If necessary, press <F5> (View Orders Built) to display a list of the pre-book orders previous created using the pre-book default.
8. To enter or change the order quantity of an item, enter values for the following fields at the top of the screen before pressing <Enter>:
 - **Item#** - the item number of an item. If necessary, press <F4> to select an item number from the Select Item By Description screen.
 - **Qty** - the order quantity of the designated item.
 Note: The **Item#** and **Qty** cannot be used to add items to the order.
9. Repeat the previous step to continue entering order quantities, or use the **Qty** fields next to the item numbers of the list to enter order quantities.

```

GW00DFR   DISPLAY CDR Customer Conference           10/19/09 10:45:1
                                Prebook Order Creation
Pre-book#  2000 Ship Date 102009                    Pre-Book Order->
Cust#     700180 L & M GROCERY                        Total      16
Item#     Qty      Code #1   Code #2                Items      2

Type options, press Enter.

? Qty  Item#  Item Description                               F
      8 561158 KEEBLER CHIPS DELUXE  2OZ
      8 561161 KEEBLER PECAN SANDIES 2 OZ

F3=Exit  F4=Search  F5=View Orders Built  F10=Create Order

```

As order quantities are entered, the total quantity of items ordered and the number of items ordered appear for the **Total** and **Items** fields in the top right corner of the screen.

10. Press <F10> (Create Order) when data entry is complete.

```

GWOODFR      DISPLAY CDR Customer Conference      10/19/09 10:45:35
              Prebook Order Creation
Pre-book# 2000 Ship Date 102009      Pre-Book Order-> 22
Cust#
Item#      Qty      Code #1      Code #2      Items      16
              Total
              Items      2

Type options, press Enter.

? Qty  Item#  Item Description      F
      8 561158 KEEBLER CHIPS DELUXE 2OZ
      8 561161 KEEBLER PECAN SANDIES 2 OZ

F3=Exit  F4=Search  F5=View Orders Built  F10=Create Order

```

The pre-books order's number is automatically generated by the system, and appears for the **Pre-book Order** field.

11. Repeat the previous steps to continue adding pre-book orders, or press <F3> to exit.

Using Release Pre-books To Export Orders

The step-by-step instructions below describe using the the Release Pre-books screen to *select* the pre-booked items for export, and the Prompt For Export screen to review and *export* the pre-book orders as new *Pick* type customer orders.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.

```
User: JEANNINE           Menu: OTHCV1           Date: 10/19/09
===== > O T H E R   O P E R A T I O N S < =====
|||||
THE  ||           1. Archive Functions
DAC  ||           2. Unitrac (PMSTARS Etc.)
SYSTEM ||         3. QDN Interface
|||||           4. E-Mail
|||||           5. Pre-Booked Order System
|||||           6. Fast Track Reporting
|||||           7. Hershey Reporting
|||||           8. DEA Allocation
|||||           9. PERCS Reporting
|||||          10. NTS/Victory Reporting
|||||          11. Red Bull Reporting
|||||          M E N U   C A L L S
19. Other Operations 2  20.
22.                   23. Dac Main Menu      21. WAM/InfoMetrics
                               90. Sign Off
=====
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==>
```

2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```
User: JEANNINE           Menu: PREBKCV1        Date: 10/19/0
===== > P R E - B O O K   O R D E R S < =====
|||||
THE  ||           1. Work With Pre-book Orders
DAC  ||           2. Work with Pre-book Items
SYSTEM ||         3. Purge Pre-book Orders
|||||           4. Print Pre-Book Orders
|||||           5. Print Pre-Book Orders by Customer
|||||           6. Pre-Book Report Menu
|||||           7. Work with Pre-Book Defaults
|||||           8. Create Pre-Book Orders from Defaults
|||||           9. Release Pre-Book Orders
|||||          M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu      90. Sign Off
=====
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Selection or command
==>
```

3. Select option 9 (Release Pre-book Orders) from the Pre-book Orders screen. The Release Pre-books screen appears.

```

GWP1PVR  ENTER  CDR Customer Conference  10/19/09 11:46:26
                                Release Pre-Books
Q U A L I F Y:
Pre-book Number . . . . .
Ship Date Range: From .          to
Item . . . . .
Warehouse . . . . .
Vendor . . . . .
Deal # . . . . .
Customer . . . . .
Route Range:   From .          to          Primary must be in range? (Y/N)

Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)
Require pending order? . . (P=Primary Route, A=Any, Blank=Not Req.)

F3=Exit  F4=Search  F10=Release

```

4. Use one or more of the following fields to designate the pending items that qualify for changing or selecting:

- Optional: **Pre-book Number** - the qualified items are those of pre-book orders based on the designated pre-book default. If necessary, press <F4> to select a pre-book default from the Select Prebook screen.
- **Ship Date Range From** and **To** - the qualified items are those with a ship date which falls within the designated range of dates. Values are required for this date range.
- Optional: **Item** (6,n) - the qualified item's number. If necessary, press <F4> to select an item number from the Select Item By Description screen. If a value is entered for the **Item** field, users may also limit the qualified items by availability using the **Require Available Product?** field (see below).
- Optional: **Warehouse** - the qualified items are those of the designated warehouse. If necessary, press <F4> to select a warehouse code from the Select Warehouse Master screen.
- Optional: **Vendor** (6,a) - the qualified items are those purchased from the designated vendor. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
- Optional: **Deal #** (6,n) - the qualified items are those to which the designated vendor deal applies. If necessary, press <F4> to select a vendor deal from the Select Deal screen.
- Optional: **Customer** (6,n) - the qualified items are those of the designated customer's pre-book orders. If necessary, press <F4> to select a customer number from the Select Customer Master screen.
- Optional: **Route Range From** and **To** (6,a) - the qualified items are those of pre-book orders for customers with routes which fall within the designated range of routes. If necessary, press <F4> to select routes from the Select Route Description screen.

- Optional: **CODE #1** and **CODE #2** (2,a) - the qualified items are those of pre-book orders for which the designated codes were entered for one or both the **User Code #1** and **User Code #1** fields when the orders were added. If necessary, press <F4> to select an order header code from the Select Order Header Code screen.

The names of these two fields, which appear as **CODE #1** and **CODE #2** in the screen above, are entered for the **Text For O.E. Code 1** and **Text For O.E. Code 2** fields of the SYS041 default system option. Refer to the DAC Default System Options document for additional information.

- Optional: **Deal Utilization** (1,a) - the qualified items are those for which the designated type of vendor deal applies (*S* = Standard or *T* = Show), or the items for which no vendor deal applies (*X* = None).
- Optional: **Require pending order?** - the qualified items are those pre-booked for customers for which “live” customer orders with an *Open* status also exist, and use the customer’s primary delivery route (*P*) or use any route (*A*).

```

GWPE1PVR  ENTER  CDR Customer Conference          10/19/09 12:05:32
                               Release Pre-Books
Q U A L I F Y:
Pre-book Number . . . . . 2000
Keebler Special
Ship Date Range: From . 101909 to 101909
Item . . . . .
Warehouse . . . . .
Vendor . . . . .
Deal # . . . . .
Customer . . . . .
Route Range:      From .          to          Primary must be in range? (Y/N)

Deal Utilization . . . . . (S=Standard, T=Show, X=None, Blank=Any)

Require pending order? . . (P=Primary Route, A=Any, Blank=Not Req.)

F3=Exit F4=Search F10=Release

```

5. Press <F10> (Release), and press <Enter> when prompted to confirm. The Prompt For Export screen appears with a list of the pre-book orders currently selected for exporting.

Position to Customer	Position to Order #	U=Unselect	
Customer / Count / Route	Order Line Item Qty	Description	Date
DIANNE'S GROCERY / 2 Lines / 100	19 1 561158 8	KEEBLER CHIPS DELUXE 2OZ	2009-10-19
	19 2 561161 8	KEEBLER PECAN SANDIES 2 OZ	2009-10-19
BOB'S SHELL / 2 Lines / 100	20 1 561158 10	KEEBLER CHIPS DELUXE 2OZ	2009-10-19
	20 2 561161 10	KEEBLER PECAN SANDIES 2 OZ	2009-10-19
EXPRESS WAY FOOD MART / 1 Lines / 300	21 1 561161 10	KEEBLER PECAN SANDIES 2 OZ	2009-10-19

F2=Glb Tools F3=Exit F4=Search F5=Refresh F6=Print F7=Options F10=Export

6. Use the following fields at the top of the screen (use <Page Down> if necessary) to review the selected pre-book orders:
 - **Position To Customer** redisplay the screen's list beginning with the designated customer. If necessary, press <F4> to select an item from the Select Customer Master screen.
 - **Position to Order #** redisplay the screen's list beginning with the designated pre-book order. If necessary, press <F4> to select an item from the Select Pre-book Order screen.
7. To *unselect* a pre-book order, locate the order in the screen's list, enter *U* in the selection column next to the customer name, and press <Enter>.
8. To print a detailed report (see below) of the selected pre-book orders before exporting the orders, press <F6> (Print).
9. If necessary, press <F7> (Options) to review or change the export options. Refer to Working With Export Options above for additional information.
10. Press <F10> (Export) to export the pre-book orders as new *Pick* type customer orders. The Pre-book Orders screen appears.

If necessary, refer to Working With Remote Orders of the Billing document for information about processing pre-book orders which appear on the Work With Remote Orders screen before they are uploaded by the user to appear as "live" orders on the Work With Orders screens.

Print Pre-book Orders

Order #	Customer	Ship Date	Deal				
19	100002 DIANNE'S GROCERY	10/19/09	35				
1	561158 KEEBLER CHIPS DELUXE 2OZ	8	2.80	2.42	10/19/09	2	Selected
2	561161 KEEBLER PECAN SANDIES 2 OZ	8	11.65	12.92	10/19/09	2	Selected
20	100003 BOB'S SHELL	10/19/09	35				
1	561158 KEEBLER CHIPS DELUXE 2OZ	10	2.80	2.42	10/19/09	2	Selected
2	561161 KEEBLER PECAN SANDIES 2 OZ	10	11.65	12.92	10/19/09	2	Selected
21	100850 EXPRESS WAY FOOD MART	10/19/09	35				
1	561161 KEEBLER PECAN SANDIES 2 OZ	10	11.65	12.92	10/19/09	2	Selected

** END OF REPORT **

Importing Pre-book Orders

Pre-book orders can be created by importing a CSV (comma-separated value) file in one of three different formats as described below. The CSV file names must be limited to 8 characters. Knowledge of the use of Microsoft Excel is required to create these files, especially when copying data from vendor spreadsheets.

Refer to *Using Format A*, *Using Format B* and *Using Ten Item Import Format* below for detailed descriptions of each format.

After creating a CSV file, use of IBM i Access Client Solutions (ACS) is highly recommended for uploading the file to DAC. Use of a mapped drive is discouraged due to security risks. Visit acs.cdrsoftware.net for additional information.

The instructions below include correcting invalid customer and item data existing in the CSV file during the import process, and creating a vendor/customer refusal list.

Those who subscribe to use CDR's Altria API web portal should refer to *CDR's Altria API Import for DAC* documentation and videos after logging in at [https://altria/cdrsoftware.com](https://altria.cdrsoftware.com).

Using Format A

The CSV file for Format A can contain an unlimited number of items for an unlimited number of customers. As illustrated below, it should include customer number, item number, the item's ship date and order quantity, in columns A through D respectively.

	A	B	C	D	E	F	G	H
1	260501	100002	8/24/2021	12				
2	320001	100002	8/24/2021	12				
3	771230	100002	8/24/2021	12				
4	100801	100003	8/12/2021	24				
5	260501	100003	8/12/2021	24				
6	320001	100003	8/12/2021	24				
7	771230	100003	8/12/2021	24				
8	100003	100026	8/20/2021	24				
9	260501	100026	8/20/2021	24				
10	320001	100028	8/18/2021	12				
11								

After importing the CSV file above, a pre-book order will be created for:

- Customers 100003 and 100801 with 1 item each.
- Customer 260501 and 320001 with 3 items each.
- Customer 771230 with 2 items.

As described in the instructions below, the ship date of each pre-book order is entered during import process.

Those who subscribe to use CDR's Altria API web portal should refer to *CDR's Altria API Import for DAC* documentation and videos after logging in at <https://altria/cdrsoftware.com>.

For others, the step-by-step instructions below describe using the Import Pre-book Orders application after the CSV file for Format A is uploaded to the CV1COM folder on the distributor's system.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.
2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```

User: JEANNINE          Menu: PREBKCV1          Date: 7/02/21

===== > P R E - B O O K   O R D E R S <=====
=====
|||||||
THE  || 1. Work with Prebook Orders
DAC  || 2. Work with Prebook Items
SYSTEM || 3. Purge Prebook Orders
||||||| 4. Print Prebook Orders
||| 5. Print Prebook Orders by Customer
|| 6. Prebook Reports Menu
|| 7. Work with Prebook Defaults
|| 8. Create Prebook Orders from Defaults
|| 9. Release Prebook Orders
|| 10. Import Prebook Orders
|| 11. Reprice ALL Prebook Orders
M E N U   C A L L S
19. Billing          20. Billing Files Maint.  21. Billing Reports
22. Remote Orders  23. Dac Main Menu          90. Sign Off
Selection or command
==>

```

3. Select option 10 (Import Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Import Batches screen appears with a list of previously added batches, or the *No data to display* message.

```

HINXDFR  DISPLAY CDR Customer Conference          7/02/21 12:06:54
                Work with Pre-Book Import Batches

2=Edit D=Delete Batch X=Create Pre-book Order(s) 5=Customer Log

? Batch#  Date      User      Imported From File
-      73  7/01/21  JEANNINE  Format B          X
-      49  4/23/21  HARLAND   Format A
-      45  4/14/21  HARLAND   Format A
-      43  4/13/21  HARLAND   Format A
-      39  4/09/21  HARLAND   Format A
-      28 10/22/18  CODY      Format A          X

F3 F10=Ten Item Import F15=Pre-book Refusal Customers F23=Import Version2

```

4. Press <F23> (Import Version2). The Select File from Folder screen appears with the list of documents in the CV1COM folder.

```

DPI8SRR  SELECT CDR Customer Conference          7/02/21 12:42:50
                Select File from Folder

CV1COM
Find -> _____ (Case-Sensitive)

Choose a file with X and press Enter.
?
- ABLCOL1.PRN
- AGETB.TXT
- ALTRIAHW.CSV
- ALTRIAL.CSV
- APRVIMP.CSV
- ARDETAIL.CSV
- AVGDAYS.PDF
- BANKCK.TXT
- COMMON.DAT
- CO011819.CSV
- CO012119.CSV
- CO122618.CSV
- CO122718.CSV
- CO122818.CSV
+

F3=Exit

```

5. Use the **Find ->** field as illustrated below (or <Page Down> if necessary) to locate the CSV file.

```

DPI8SRR  SELECT  CDR Customer Conference          7/02/21 12:42:50
                                Select File from Folder
CV1COM
Find -> FORMA_____ (Case-Sensitive)

Choose a file with X and press Enter.
?
X  FORMATA1.CSV
-  FORMATB1.CSV
-  GWTEST.CSV
-  GW2.CSV
-  HEADINGS.PRN
-  HIBINVH1.PRN
-  HIFUPFR$.HTM
-  HIFUPFR$.PDF
-  HMINVB8.PRN
-  HOLINV1.PRN
-  INV_INFO.CSV
-  INVBAL.CSV
-  INVENBAL.CSV
-  INVENKIM.CSV
+

F3=Exit

```

6. Enter *X* next to the file's name, and press <Enter>. The Choose the Import Format screen appears.

```

Choose the Import Format

A=Cust,Item,Date,Qty
*NOTE:Use A for API,also
B=Cust + Up to 30 Qty's
from a Prebook Default
Containing the Items.

C=Cancel

Choice? A

F3=Exit

```

7. Enter *A* for the **Choice?** field, and press <Enter>. If no customer and item errors are found, and no ship dates or quantities are missing, the Enter Prebook Creation Options screen appears. If the *At Least One Invalid Customer/Item was Found!* message appears, press <F3> (Exit), and repeat the previous steps after uploading the corrected CSV file.

```

DPSOPVR  ENTER  CDR Customer Conference          7/02/21 13:12:31
                                Enter Prebook Creation Options

Type choices, press Enter.

Ship Date . . . . . _____ REQUIRED
Warehouse Code . . . . . 1 _____ MAIN WAREHOUSE
Controlling Prebook# . . . . . _____ Required by "B" Method
Deal Utilization . . . . . S (S=Standard, T=Trade Show, X=Normal)
Deal Number . . . . . _____
User Code #1 . . . . . _____ Recommended for Tracking
User Code #2 . . . . . _____ Recommended for Tracking

Special Message 1 . . . . . _____
Special Message 2 . . . . . _____
Special Message 3 . . . . . _____

F3=Exit  F4=Search

```

8. Enter a date for the **Ship Date** (6,n) field to designate the default ship date for each pre-book order created during the import process.
9. If necessary, enter a different code for the **Warehouse Code** (6,a) field. With the cursor positioned in the **Warehouse Code** field, users may press <F4> to select a warehouse code from the Select Warehouse Master screen.
10. Enter 2-character codes for the **User Code #1** and **User Code #2** fields to make locating the pre-book orders easier after they are created. As illustrated below, the user's initials can be entered for the code fields. Some users enter the 2-digit number of the month for code #1 and the week number for code #2.

```

DPSOPVR   ENTER   CDR Customer Conference           7/02/21 15:52:29
                Enter Prebook Creation Options

Type choices, press Enter.

Ship Date . . . . . 080121 REQUIRED
Warehouse Code . . . . . 1 MAIN WAREHOUSE
Controlling Prebook# . . . . . Required by "B" Method
Deal Utilization . . . . . S (S=Standard, T=Trade Show, X=Normal)
Deal Number . . . . .
User Code #1 . . . . . JP Recommended for Tracking
User Code #2 . . . . . JP Recommended for Tracking

Special Message 1 . . . . .
Special Message 2 . . . . .
Special Message 3 . . . . .

F3=Exit   F4=Search

```

11. Enter data for the following fields as necessary:
 - **Deal Utilization** (1,a)
 - **Deal Number** (6,n)
 - **Special Message 1** (30,a)
 - **Special Message 2** (30,a)
 - **Special Message 3** (30,a)

Refer to Adding Pre-book Orders for information about the fields above.
12. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The INFO screen appears with the total number of line items imported.

```

...

Invalid Customers:
00000
Accepted Line Items:
00010

                INFO
                ----

F3=Exit

```

13. Press <F3> (Exit). The Imported Pre-book Customers screen appears.

```

DPSUDFR      DISPLAY CDR Customer Conference          7/02/21 16:16:30
              Imported Pre-Book Customers
Batch#
  93

? Batch#  Line#  Cust#
-   93      1 100003 BOB'S SHELL
-   93      2 100801 BARON EXPRESS #2 BP
-   93      3 260501 BIG JOHN'S QUICK STOP #1
-   93      4 320001 BIG P MINI MART
-   93      5 771230 B AND D FOOD STORE #230

F3=Exit

```

14. Press <F3> (Exit).

15. To view the imported pre-book orders, select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears.

```

CVKGDFF      DISPLAY CDR Customer Conference          7/02/21 16:50:36
              Work with Pre-Book Orders
ShipDate PB ORD# PB#  Cust#  Vendor Deal#  Whs  Deal  Code Code P. Rte
              Utilz  #1  #2
              1  -  JP  -  -  OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates  8=Reprice  Z=Zoom to Header  H=Set Hdr from Dtl
? Ship Dte  Cust  PB-Ord#  Cde1  Cde2  Pbk#
- 8/01/21 100003 BOB'S SHELL 516 JP JP
- 8/01/21 100801 BARON EXPRESS #2 BP 517 JP JP
- 8/01/21 260501 BIG JOHN'S QUICK STOP #1 518 JP JP
- 8/01/21 320001 BIG P MINI MART 519 JP JP
- 8/01/21 771230 B AND D FOOD STORE #230 520 JP JP

F1=W/Order F2=Tool F5=Refresh F7=All F8=Export F10=Create F12=Dates F17=Status

```

As illustrated above, the **Code #1** restrictor field at the top of the screen can be used to easily locate the imported pre-book orders.

16. To view the items of an imported pre-book order, enter 2 (Edit) in the selection column next to the order's ship date, and press <Enter>. The Edit Pre-book Order screen appears with the order's pending items listed in order by ship date.

```

CVVLDFR   DISPLAY CDR Customer Conference           7/02/21 17:28:39
                Edit Pre-Book Order
Customer 260501 BIG JOHN'S QUICK STOP #1
Position Ship Date--> _____ Limit Item--> _____ Limit Order#--> 518
-----
Item _____ Qty _____ U/M _ Pending 3 Exported 0 SHOW PENDING
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message

      Ord / Line Item Qty U/M Price Extension
-----
      518 2 100003 24 2 CTN 40.20 964.80
      Ship Date _81221 MARLBORO BLACK BOX 100
      518 3 100026 24 2 CTN 40.20 964.80
      Ship Date _82021 MARLBORO BLACK MEN SPEC BLEND BX KS
      518 1 100002 12 2 CTN 40.20 482.40
      Ship Date _82421 MARLBORO BLACK BOX K/S SOFTPACK

F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

- To edit the ship dates of the items of an imported pre-book order, enter the date in the **Ship Date** (6,n) field for the necessary items, and press <F3> (Exit) when data entry is complete.

Using Format B

The CSV file for Format B contains the order quantity for up to 30 items (which are designated in a pre-book default) for an unlimited number of customers.

	A	B	C	D	E	F	G	H	I	J
1	771230	10	12	14	16	10	12	14	16	18
2	100801	18	16	14	12	10	8	6	4	2
3	260501	16	14	12	10	16	14	12	16	14
4	260502	10	12	14	16	18	12	14	16	18
5	320001	16	14	18	16	10	8	6	4	2
6	100003	12	12	12	12	12	10	12	14	16
7	100802	18	16	14	18	16	14	18	16	14
8	800237	24	24	24	24	24	24	24	24	24

As illustrated above, the CSV file for Format B should include customer numbers in column A and order quantities beginning in column B.

The pre-book default containing the item numbers which correspond to the order quantities can be created before importing the CSV file, or created during the import process. In either case, *the order quantities must be entered in the CSV file from left to right beginning with column B to correspond to the items as they are entered in the pre-book default.*

For example, if the CSV file above is imported using the pre-book default illustrated below, the pre-book order for customer number 771230 will include quantity of 10 for item number 100002 which was entered first in the pre-book default, and quantity of 12 for item number 100026 which was entered second.

```

GMNSDFR   DISPLAY CDR Customer Conference   6/30/21 11:48:13
                Enter Pre-Book Detail
Prebook# Item  Line  Vendor
2021      _____
Type options, press Enter.
2=Edit D=Delete C=Copy
? Item  Description                Promo$   Price  Dist$  Slsmn$
_ 100005 MARLBORO BLEND BOX KING #27      .50     .000
_ 100001 MARLBORO BLEND BOX K/S SOFTPACK   .50     .000
_ 100027 MARLBORO BLACK SPEC BLEND BOX 100 .50     .000
_ 100024 MARLBORO BLACK SPEC BLEND BOX KING .50     .000
_ 100004 MARLBORO BLACK MEN BOX 100        .50     .000
_ 100058 MARLBORO BLACK BOX 100 B2G$2     .50     .000
_ 100028 MARLBORO BLACK MEN SPEC BLEND B 100 .50     .000
_ 100026 MARLBORO BLACK MEN SPEC BLEND BX KS .50     .000
_ 100002 MARLBORO BLACK BOX K/S SOFTPACK   .50     .000
  
```

As illustrated above, the items of a pre-book default appear in reverse order on the Enter Pre-book Detail screen after they are entered.

The step-by-step instructions below describe using the Import Pre-book Orders application after the CSV file for Format B is uploaded to the CV1COM folder on the distributor's system and pre-book default is created.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.
2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```

User: JEANNINE           Menu: PREBKCV1           Date: 7/05/21
===== > P R E - B O O K   O R D E R S < =====
=====
|||||      1. Work with Prebook Orders
THE  ||     2. Work with Prebook Items
DAC  ||     3. Purge Prebook Orders
SYSTEM ||   4. Print Prebook Orders
|||||      5. Print Prebook Orders by Customer
      6. Prebook Reports Menu
      7. Work with Prebook Defaults
      8. Create Prebook Orders from Defaults
      9. Release Prebook Orders
     10. Import Prebook Orders
     11. Reprice ALL Prebook Orders
          M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu           90. Sign Off
Selection or command
====>

```

3. Select option 10 (Import Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Import Batches screen appears with a list of previously added batches, or the *No data to display* message.

```

HINXDFR  DISPLAY CDR Customer Conference           7/05/21 11:00:26
          Work with Pre-Book Import Batches

2=Edit  D=Delete Batch  X=Create Pre-book Order(s)  5=Customer Log

? Batch#  Date      User      Imported From File
-      93  7/02/21  JEANNINE  Format A
-      49  4/23/21  HARLAND   Format A
-      45  4/14/21  HARLAND   Format A
-      43  4/13/21  HARLAND   Format A
-      39  4/09/21  HARLAND   Format A
-      28 10/22/18  CODY      Format A
                                           X

F3  F10=Ten Item Import  F15=Pre-book Refusal Customers  F23=Import Version2

```

4. Press <F23> (Import Version2). The Select File from Folder screen appears with the list of documents in the CV1COM folder.

```

DPI8SRR   SELECT   CDR Customer Conference   7/05/21 11:06:34
                Select File from Folder
CV1COM
Find -> _____ (Case-Sensitive)

Choose a file with X and press Enter.
?
- ABLCOL1.PRN
- AGETB.TXT
- ALTRIAHW.CSV
- ALTRIAL.CSV
- APRVIMP.CSV
- ARDETAIL.CSV
- AVGDAYS.PDF
- BANKCK.TXT
- COMMON.DAT
- CO011819.CSV
- CO012119.CSV
- CO122618.CSV
- CO122718.CSV
- CO122818.CSV
+
F3=Exit

```

5. Use the **Find ->** field as illustrated below (or <Page Down> if necessary) to locate the CSV file.

```

DPI8SRR   SELECT   CDR Customer Conference   7/05/21 11:06:34
                Select File from Folder
CV1COM
Find -> FORMA_____ (Case-Sensitive)

Choose a file with X and press Enter.
?
- FORMATA1.CSV
X FORMATB1.CSV
- GWTEST.CSV
- GW2.CSV
- HEADINGS.PRN
- HIBINVH1.PRN
- HIFUPFR$.HTM
- HIFUPFR$.PDF
- HMINVB8.PRN
- HOLINV1.PRN
- INV_INFO.CSV
- INVBAL.CSV
- INVENBAL.CSV
- INVENKIM.CSV
+
F3=Exit

```

6. Enter *X* next to the file's name, and press <Enter>. The Choose the Import Format screen appears.

```

Choose the Import Format
-----
A=Cust,Item,Date,Qty
*NOTE:Use A for API,also
B=Cust + Up to 30 Qtys
from a Prebook Default
Containing the Items.

C=Cancel

Choice? B

F3=Exit

```

7. Enter *B* for the **Choice?** field, and press <Enter>.

8. Enter *S* for the **Choice?** field, and press <Enter> when the *Do You Want to Create a NEW Prebook Default? OR Select an Existing One On the Next Screen? N=New (Create) S=Select (Existing)* message appears. The Enter Prebook Creation Options screen appears. If the *At Least One Invalid Customer/Item was Found!* message appears, press <F3> (Exit), and repeat the previous steps after uploading the corrected CSV file.

```

DPSOPVR   ENTER   CDR Customer Conference   7/05/21 11:16:59
                Enter Prebook Creation Options

Type choices, press Enter.

Ship Date . . . . . _____ REQUIRED
Warehouse Code . . . . . 1 _____ MAIN WAREHOUSE
Controlling Prebook# . . . . . _____ Required by "B" Method
Deal Utilization . . . . . S (S=Standard, T=Trade Show, X=Normal)
Deal Number . . . . . _____
User Code #1 . . . . . _____ Recommended for Tracking
User Code #2 . . . . . _____ Recommended for Tracking

Special Message 1 . . . . . _____
Special Message 2 . . . . . _____
Special Message 3 . . . . . _____

F3=Exit   F4=Search

```

9. Enter a date for the **Ship Date** (6,n) field to designate the default ship date for each pre-book order created during the import process.
10. If necessary, enter a different code for the **Warehouse Code** (6,a) field. With the cursor positioned in the **Warehouse Code** field, users may press <F4> to select a warehouse code from the Select Warehouse Master screen.
11. Enter the pre-book default's number for the **Controlling Prebook#** (5,n) field to designate the pre-book default containing the item numbers corresponding to the order quantities of the CSV file.
12. Enter one of the following values for the **Deal Utilization** field:
 - *S* (Standard) for pricing the order's items according to a standard booking vendor deal.
 - *T* (Show) for pricing the order's items according to a trade show booking vendor deal.
13. Enter 2-character codes for the **User Code #1** and **User Code #2** fields to make locating the pre-book orders easier after they are created. As illustrated below, the user's initials can be entered for the code fields. Some users enter the 2-digit number of the month for code #1 and the week number for code #2.
14. Enter data as necessary for the following fields:
 - **Special Message 2** (30,a) - a message which is printed at the top of the order's invoice under the *Special Message* heading.
 - **Special Message 3** (30,a) - a message which is printed below the list of ordered items on the invoice.

If a code was entered for the **Account Type** field of the customer's record, the message of the corresponding **Account Type Message** field overrides the message entered for the **Special Message 3** field. Refer to Working With Account Types of the Customer File Maintenance document for additional information.

Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document for information about creating invoice messages that are printed on every customer's invoices.

```

DPSOPVR  ENTER  CDR Customer Conference          7/05/21 11:16:59
                Enter Prebook Creation Options

Type choices, press Enter.

Ship Date . . . . . 081021 REQUIRED
Warehouse Code . . . . . 1 MAIN WAREHOUSE
Controlling Prebook# . . . . . 2021 Required by "B" Method
Deal Utilization . . . . . S (S=Standard, T=Trade Show, X=Normal)
Deal Number . . . . .
User Code #1 . . . . . JP Recommended for Tracking
User Code #2 . . . . . JP Recommended for Tracking

Special Message 1 . . . . .
Special Message 2 . . . . .
Special Message 3 . . . . .

F3=Exit  F4=Search
  
```

15. Press <Enter> when data entry is complete. The Enter Prebook Creation Options screen is redisplayed, as illustrated below, with data appearing for the **Deal Number** (6,n) and **Special Message 1** (30,a) fields.

```

DPSOPVR  ENTER  CDR Customer Conference          7/05/21 11:16:59
                Enter Prebook Creation Options

Type choices, press Enter.

Ship Date . . . . . 081021 REQUIRED
Warehouse Code . . . . . 1 MAIN WAREHOUSE
Controlling Prebook# . . . . . 2021 Format B Import
Deal Utilization . . . . . S (S=Standard, T=Trade Show, X=Normal)
Deal Number . . . . . 152 PREBOOKING - #02021
User Code #1 . . . . . JP Recommended for Tracking
User Code #2 . . . . . JP Recommended for Tracking

Special Message 1 . . . . . PREBOOKING - #02021
Special Message 2 . . . . .
Special Message 3 . . . . .

F3=Exit  F4=Search

CONFIRM: Y (Y/N)
  
```

16. Press <Enter> when prompted to confirm. The INFO screen appears with the total number of customer pre-book orders created.

```

...
Invalid Customers:
00000
Accepted Customers:
00008

INFO
----

F3=Exit

```

17. Press <F3> (Exit). The Imported Pre-Book Customers screen appears.

```

DPSUDFR      DISPLAY CDR Customer Conference      7/05/21 12:28:30
              Imported Pre-Book Customers

Batch#
____ 96

? Batch#  Line#  Cust#
-   96     1  771230 B AND D FOOD STORE #230
-   96     2  100801 BARON EXPRESS #2 BP
-   96     3  260501 BIG JOHN'S QUICK STOP #1
-   96     4  260502 BIG JOHN'S QUICK STOP #2
-   96     5  320001 BIG P MINI MART
-   96     6  100003 BOB'S SHELL
-   96     7  100802 CRANKY CORNER QUICK STOP
-   96     8  800237 DANNY & CLYDE'S FOOD #20

F3=Exit

```

18. Press <F3> (Exit). The Pre-book Orders screen appears.

19. To view the imported pre-book orders, select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears.

```

CVKGDFF      DISPLAY CDR Customer Conference      7/05/21 12:41:32
              Work with Pre-Book Orders

ShipDate PB ORD# PB#  Cust#  Vendor Deal#  Whs  Deal  Code Code P. Rte
              _2021          1          -          Utilz #1 #2          OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates  8=Reprice  Z=Zoom to Header  H=Set Hdr from Dtl

? Ship Dte  Cust          PB-Ord#  Cde1  Cde2  Pbk#
-  8/10/21  771230 B AND D FOOD STORE #230          521  JP  JP  2021
-  8/10/21  100801 BARON EXPRESS #2 BP          522  JP  JP  2021
-  8/10/21  260501 BIG JOHN'S QUICK STOP #1          523  JP  JP  2021
-  8/10/21  260502 BIG JOHN'S QUICK STOP #2          524  JP  JP  2021
-  8/10/21  320001 BIG P MINI MART          525  JP  JP  2021
-  8/10/21  100003 BOB'S SHELL          526  JP  JP  2021
-  8/10/21  100802 CRANKY CORNER QUICK STOP          527  JP  JP  2021
-  8/10/21  800237 DANNY & CLYDE'S FOOD #20          528  JP  JP  2021

F1=W/Order  F2=Tool  F5=Refresh  F7=All  F8=Export  F10=Create  F12=Dates  F17=Status

```

As illustrated above, the **BP#** and the **Code #1** restrictor fields at the top of the screen can be used to easily locate the imported pre-book orders.

20. To edit the ship dates of the items of an imported pre-book order, enter 2 (Edit) in the selection column next to the order's ship date, and press <Enter>. The Edit Pre-book Order screen appears with the order's pending items listed in order by ship date..

```

CVVLDFR   DISPLAY CDR Customer Conference                               7/05/21 12:45:35
                                     Edit Pre-Book Order
Customer  771230 B AND D FOOD STORE #230
Position  Ship Date--> _____ Limit Item--> _____ Limit Order#--> 521
-----
Item _____ Qty _____ U/M _ Pending 9 Exported 0 SHOW PENDING
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message

      Ord / Line Item Qty U/M Price Extension
-   M 521 9 100005 18 2 CTN 58.65 1055.70
    Ship Date _81021 MARLBORO BLEND BOX KING #27
-   M 521 8 100001 16 2 CTN 48.15 770.40
    Ship Date _81021 MARLBORO BLEND BOX K/S SOFTPACK
-   M 521 7 100027 14 2 CTN 58.65 821.10
    Ship Date _81021 MARLBORO BLACK SPEC BLEND BOX 100
-   M 521 6 100024 12 2 CTN 58.65 703.80
    Ship Date _81021 MARLBORO BLACK SPEC BLEND BOX KING
-   M 521 5 100004 10 2 CTN 54.69 546.90
    Ship Date _81021 MARLBORO BLACK MEN BOX 100
-   M 521 4 100058 16 2 CTN 54.69 875.04
    Ship Date _81021 MARLBORO BLACK BOX 100 B2G$2
+
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

Enter the date in the **Ship Date** (6,n) field for the necessary items.

```

CVVLDFR   DISPLAY CDR Customer Conference                               7/05/21 12:45:35
                                     Edit Pre-Book Order
Customer  771230 B AND D FOOD STORE #230
Position  Ship Date--> _____ Limit Item--> _____ Limit Order#--> 521
-----
Item _____ Qty _____ U/M _ Pending 9 Exported 0 SHOW PENDING
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message

      Ord / Line Item Qty U/M Price Extension
-   M 521 9 100005 18 2 CTN 58.65 1055.70
    Ship Date _81221 MARLBORO BLEND BOX KING #27
-   M 521 8 100001 16 2 CTN 48.15 770.40
    Ship Date _81221 MARLBORO BLEND BOX K/S SOFTPACK
-   M 521 7 100027 14 2 CTN 58.65 821.10
    Ship Date _81021 MARLBORO BLACK SPEC BLEND BOX 100
-   M 521 6 100024 12 2 CTN 58.65 703.80
    Ship Date _81021 MARLBORO BLACK SPEC BLEND BOX KING
-   M 521 5 100004 10 2 CTN 54.69 546.90
    Ship Date _81021 MARLBORO BLACK MEN BOX 100
-   M 521 4 100058 16 2 CTN 54.69 875.04
    Ship Date _81021 MARLBORO BLACK BOX 100 B2G$2
+
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

Press <F3> (Exit) when data entry is complete.

Using Ten Item Import Format

The CSV file for Ten Item Import Format contains a maximum of 10 items for an unlimited number of customers.

As illustrated below, the CSV file should include item data in columns A through D (for 1 to 10 items) followed by customer data in columns A through E and order quantities in columns F through O as necessary.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	items														
2		100040 MERIT BLUE BOX KING	20PK	2820030171											
3		100041 MERIT BLUE BOX 100	20PK	2820030141											
4		100042 MERIT BLUE 100	20PK	2820030161											
5		100043 MERIT BRONZE BOX KING	20PK	2820030131											
6		100051 VIRGINIA SLIM GOLD BOX 100	20PK	2820017330											
7		100052 VIRGINIA SLIM GOLD MEN BOX 100	20PK	2820017340											
8		100053 VIRGINIA SLIM GOLD MEN 120	20PK	2820017390											
9		100054 VIRGINIA SLIM GOLD 120	20PK	2820017350											
10		100057 VIRGINIA SLIM SILVER BOX 100	20PK	2820017430											
11		119526 VIRGINIA SLIM SILVER MEN BOX 100	20PK	2820017440											
12	customers														
13	JR FOOD MART - ABITA	22079 HWY 59	ABITA SPRINGS	LA	100900	12	10	8	24	8	6	10	8	24	8
14	JR FOOD MART - FOLSOM	82322 HWY 25	FOLSOM	LA	100857	24	12	6	10	12	24	12	6	10	12
15	L & M GROCERY	82562 LEE SETTLEMENT RD	FOLSOM	LA	700180	8	24	8	6	24	8	24	8	6	24
16	LIL SHORT STOP - OCEAN SPRINGS	6436 HWY 57	OCEAN SPRINGS	MS	320092	10	8	24	8	6	6	8	24	8	6
17	LIL SHORT STOP - VANCLEVE	12600 HWY 57	VANCLEVE	MS	320091	12	10	8	24	8	6	10	8	24	8
18	MISS STOP N GO #110	PO BOX 779	BRANCH	MS	380110	24	24	12	6	10	12	24	12	6	10
19	MISS STOP N GO #120	3500 EAST SIDE BLVD	JACKSON	MS	380120	24	12	6	10	12	24	12	6	10	12
20	MISS STOP N GO #130	2009 FOURTH ST	NORTH BRANCH	MS	380130	8	12	10	8	24	8	12	10	8	24
21	MISSISSIPPI STOP N GO	1235 RIVER RD	RIVER CITY	MS	380100	12	10	8	24	8	6	10	8	24	8

The text *items* must be entered in row 1 column A (cell A1) above the item data and *customers* must be entered in column A of the row above the customer data. If necessary, contact CDR support personnel to obtain the PBTEMPLATE.CSV file to use as a template.

The DAC item record fields corresponding to the item data above are **Item Number**, **Item Description**, **Retail PK** and **UPC** for columns A through D respectively.

The DAC customer record fields corresponding to the customer data above are **Customer Name**, **Address Line 1**, **City**, **St** and **Customer Number** for columns A through E respectively.

The order quantity entered in columns F through O correspond to the items entered in row 2 through 11 respectively.

While only valid item and customer numbers are required to successfully import a CSV file in the Ten Item Import Format, entering the additional item and customer data will make reviewing the items and customers easier after the import process is complete.

The step-by-step instructions below describe using the Import Pre-book Orders application after the CSV file for Ten Item Import Format is uploaded to the CV1COM folder on the distributor's system. Also included are instructions for creating the pre-book orders with the items and customers in the CSV file.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.
2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```

User: JEANNINE           Menu: PREBKCV1           Date: 7/07/21

===== > P R E - B O O K   O R D E R S <=====
=====
|||||      1. Work with Prebook Orders
THE  ||    2. Work with Prebook Items
DAC  ||    3. Purge Prebook Orders
SYSTEM ||  4. Print Prebook Orders
|||||      5. Print Prebook Orders by Customer
      6. Prebook Reports Menu
      7. Work with Prebook Defaults
      8. Create Prebook Orders from Defaults
      9. Release Prebook Orders
     10. Import Prebook Orders
     11. Reprice ALL Prebook Orders
          M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu           90. Sign Off
Selection or command
==>

```

3. Select option 10 (Import Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Import Batches screen appears with a list of previously added batches, or the *No data to display* message.

```

HINXDFR  DISPLAY CDR Customer Conference  7/07/21 15:03:24
          Work with Pre-Book Import Batches

2=Edit  D=Delete Batch  X=Create Pre-book Order(s)  5=Customer Log

? Batch#  Date      User      Imported From File
-   103  7/07/21  JEANNINE  Format A
-   96   7/05/21  JEANNINE  Format B      X
-   93   7/02/21  JEANNINE  Format A
-   49   4/23/21  HARLAND   Format A
-   45   4/14/21  HARLAND   Format A
-   43   4/13/21  HARLAND   Format A
-   39   4/09/21  HARLAND   Format A
-   28  10/22/18  CODY      Format A      X

F3  F10=Ten Item Import  F15=Pre-book Refusal Customers  F23=Import Version2

```

4. Press <F10> (Ten Item Import). The Import Batch from File screen appears with the previously used CSV file listed.

```

HIOOPVR  ENTER  CDR Customer Conference  7/07/21 15:08:57
                Import Batch from File

Enter full path & filename of file to import. Ex. /tmp/forceout.dat

/qdls/cv1com/FORMATB1.csv_____
_____
_____
_____

F3=Exit

```

5. Enter the new CSV file's name for the **Enter full path & filename of file to import** field.

```

HIOOPVR  ENTER  CDR Customer Conference  7/07/21 15:08:57
                Import Batch from File

Enter full path & filename of file to import. Ex. /tmp/forceout.dat

/qdls/cv1com/10ITEM01.csv_____
_____
_____
_____

F3=Exit

```

6. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Work With PBI Items screen appears.

```

HINODFR  DISPLAY CDR Customer Conference  7/07/21 15:20:56
                Work with PBI Items
Line Number _____ Actual Item _____ Imported Item _____
D=Delete  ?=Select Item#  X=Alt.Select

      Line      Item  Description                Pack  UPC
_      1 Act. 100040 MERIT BLUE BOX KING      20PK  2820030171
Ovr UM _ Import 100040 MERIT BLUE BOX KING      20PK  2820030171

_      2 Act. 100041 MERIT BLUE BOX 100        20PK  2820030141
Ovr UM _ Import 100041 MERIT BLUE BOX 100        20PK  2820030141

_      3 Act. 100042 MERIT BLUE 100             20PK  2820030161
Ovr UM _ Import 100042 MERIT BLUE 100             20PK  2820030161

_      4 Act. 100043 MERIT BRONZE BOX KING      20PK  2820030131
Ovr UM _ Import 100043 MERIT BRONZE BOX KING      20PK  2820030131

_      5 Act. 100051 VIRGINIA SLIM GOLD BOX 100  20PK  2820017330
Ovr UM _ Import 100051 VIRGINIA SLIM GOLD BOX 100  20PK  2820017330
+

F3=Exit  F7=Jump to Customers  F10=Add Item

```

Refer to Editing Imported Item Data for additional information about the Work With PBI Items screen.

- Press <F7> (Jump to Customers) to view the imported customer data. The Work With Pre-book Import:Customer screen appears.

```

HINYDFR   DISPLAY CDR Customer Conference           7/08/21 10:38:21
                Work with Pre-Book Import:Customer
Line Number  Actual Customer  Imported Customer  Show All
D=Delete  ?=Select  X=Alt.Select
                NOTE:Use F8 Filter By Status
ITEMS:  Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item10
        100040 100041 100042 100043 100051 100052 100053 100054 100057 119526
?      Cust  Address/City/State
-      Act 100900 JR FOOD MART - ABITA, 22079 HWY 59, ABITA SPRINGS, LA
        Imp 100900 JR FOOD MART - ABITA, 22079 HWY 59, ABITA SPRINGS, LA
        Qty  12   10   8   24   8   6   10   24   8
-      Act 100857 JR FOOD MART - FOLSOM, 82322 HWY 25, FOLSOM, LA
        Imp 100857 JR FOOD MART - FOLSOM, 82322 HWY 25, FOLSOM, LA
        Qty  24  12   6  10  12  24  12   6  10  12
-      Act 700180 L & M GROCERY, 82562 LEE SETTLEMENT RD, FOLSOM, LA
        Imp 700180 L & M GROCERY, 82562 LEE SETTLEMENT RD, FOLSOM, LA
        Qty   8  24   8   6  24   8  24   8   6  24
                                                +
F2=Show/Hide F3 F4=Show Item F7=Jump to Items F8=Status F10=Add F24=XREFs

```

Refer to Editing Imported Customer Data for additional information about the Work With Pre-book Import:Customer screen.

- Press <F3> to exit when data editing is complete. The Work With Pre-book Import Batches screen appears.

```

HINXDFR   DISPLAY CDR Customer Conference           7/08/21 11:27:51
                Work with Pre-Book Import Batches
2=Edit  D=Delete Batch  X=Create Pre-book Order(s)  5=Customer Log
? Batch#  Date    User      Imported From File
-      105  7/07/21  JEANNINE  /qdl/cv1com/10ITEM01.csv  Customers=00009
-      103  7/07/21  JEANNINE  Format A
-      96   7/05/21  JEANNINE  Format B
-      93   7/02/21  JEANNINE  Format A
-      49   4/23/21  HARLAND   Format A
-      45   4/14/21  HARLAND   Format A
-      43   4/13/21  HARLAND   Format A
-      39   4/09/21  HARLAND   Format A
-      28  10/22/18  CODY      Format A
                                                X
F3  F10=Ten Item Import  F15=Pre-book Refusal Customers  F23=Import Version2

```

- Enter X (Create Pre-book Orders) in the selection column next to the new pre-book import batch.

```

HINXDFR   DISPLAY CDR Customer Conference           7/08/21 11:27:51
                Work with Pre-Book Import Batches

2=Edit  D=Delete Batch  X=Create Pre-book Order(s)  5=Customer Log

? Batch#  Date      User      Imported From File
X   105  7/07/21  JEANNINE  /qdl/cv1com/10ITEM01.csv Customers=00009
-   103  7/07/21  JEANNINE  Format A
-   96   7/05/21  JEANNINE  Format B
-   93   7/02/21  JEANNINE  Format A
-   49   4/23/21  HARLAND   Format A
-   45   4/14/21  HARLAND   Format A
-   43   4/13/21  HARLAND   Format A
-   39   4/09/21  HARLAND   Format A
-   28  10/22/18  CODY      Format A

F3 F10=Ten Item Import  F15=Pre-book Refusal Customers  F23=Import Version2

```

10. Press <Enter>. The Create Orders From Batch screen appears.

```

DPSOPVR   ENTER   CDR Customer Conference           7/08/21 11:46:52
                Enter Prebook Creation Options

Type choices, press Enter.

Ship Date . . . . . _____ REQUIRED
Warehouse Code . . . . . 1 _____ MAIN WAREHOUSE
Controlling Prebook# . . . . . _____ Required by "B" Method
Deal Utilization . . . . . S (S=Standard, T=Trade Show, X=Normal)
Deal Number . . . . . _____
User Code #1 . . . . . _____ Recommended for Tracking
User Code #2 . . . . . _____ Recommended for Tracking

Special Message 1 . . . . . _____
Special Message 2 . . . . . _____
Special Message 3 . . . . . _____

F3=Exit  F4=Search

```

11. Enter a date for the **Ship Date** (6,n) field to designate the default ship date for each pre-book order created during the import process.
12. If necessary, enter a different code for the **Warehouse Code** (6,a) field. With the cursor positioned in the **Warehouse Code** field, users may press <F4> to select a warehouse code from the Select Warehouse Master screen.
13. Enter 2-character codes for the **User Code #1** and **User Code #2** fields to make locating the pre-book orders easier after they are created. As illustrated below, the user's initials can be entered for the code fields. Some users enter the 2-digit number of the month for code #1 and the week number for code #2.

```

DPSOPVR   ENTER   CDR Customer Conference           7/08/21 11:46:52
                Enter Prebook Creation Options

Type choices, press Enter.

Ship Date . . . . . 080221 REQUIRED
Warehouse Code . . . . . 1 MAIN WAREHOUSE
Controlling Prebook# . . . . . Required by "B" Method
Deal Utilization . . . . . S (S=Standard, T=Trade Show, X=Normal)
Deal Number . . . . .
User Code #1 . . . . . JP Recommended for Tracking
User Code #2 . . . . . JP Recommended for Tracking

Special Message 1 . . . . .
Special Message 2 . . . . .
Special Message 3 . . . . .

F3=Exit   F4=Search

```

14. Enter data for the following fields as necessary:

- Deal Utilization (1,a)
- Deal Number (6,n)
- Special Message 1 (30,a)
- Special Message 2 (30,a)
- Special Message 3 (30,a)

Refer to Adding Pre-book Orders for information about the fields above.

15. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Work With Pre-book Import Batches screen appears with the ##### orders created message where ##### designates the total number of pre-book orders created.

16. Press <F3> (Exit). The Pre-book Orders screen appears.

17. To view the imported pre-book orders, select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears.

```

CVKGDFR   DISPLAY CDR Customer Conference           7/08/21 12:33:42
                Work with Pre-Book Orders
ShipDate PB ORD# PB#   Cust#  Vendor Deal#   Whs   Deal Code Code P. Rte
                Utilz  #1   #2
080221   _____  _____  _____  _____  1 _____  -   JP   _____  OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates  8=Reprice  Z=Zoom to Header  H=Set Hdr from Dtl
? Ship Dte   Cust#                               PB-Ord#  Cdel  Cde2  Pbk#
- 8/02/21   100900  JR FOOD MART - ABITA                          564  JP   JP
- 8/02/21   100857  JR FOOD MART - FOLSOM                          565  JP   JP
- 8/02/21   700180  L & M GROCERY                                  566  JP   JP
- 8/02/21   320092  LIL SHORT STOP - OCEAN SPRINGS                 567  JP   JP
- 8/02/21   320091  LIL SHORT STOP - VANCLEVE                       568  JP   JP
- 8/02/21   380110  MISS STOP N GO #110                             569  JP   JP
- 8/02/21   380120  MISS STOP N GO #120                             570  JP   JP
- 8/02/21   380130  MISS STOP N GO #130                             571  JP   JP
- 8/02/21   380100  MISSISSIPPI STOP N GO                           572  JP   JP
- 8/10/21   771230  B AND D FOOD STORE #230                         521  JP   JP  2021
- 8/10/21   100801  BARON EXPRESS #2 BP                             522  JP   JP  2021
- 8/10/21   260501  BIG JOHN'S QUICK STOP #1                       523  JP   JP  2021

F1=W/Order F2=Tool F5=Refresh F7=All F8=Export F10=Create F12=Dates F17=Status

```

As illustrated above, the **ShipDate** and the **Code #1** restrictor fields at the top of the screen can be used to easily locate the imported pre-book orders.

18. To edit the ship dates of the items of an imported pre-book order, enter 2 (Edit) in the selection column next to the order's ship date, and press <Enter>. The Edit Pre-book Order screen appears with the order's pending items listed in order by ship date..

```

CVVLDFR      DISPLAY CDR Customer Conference              7/08/21 12:40:47
                  Edit Pre-Book Order
Customer 100900 JR FOOD MART - ABITA
Position Ship Date--> _____ Limit Item--> _____ Limit Order#--> 564
-----
Item _____ Qty _____ U/M _ Pending 10 Exported 0 SHOW PENDING
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message

      Ord / Line Item Qty U/M Price Extension
-----
564 10 119526 8 2 CTN 37.29 298.32
Ship Date _80221 VIRGINIA SLIM SILVER MEN BOX 100
564 9 100057 24 2 CTN 37.29 894.96
Ship Date _80221 VIRGINIA SLIM SILVER BOX 100
564 8 100054 8 2 CTN 37.29 298.32
Ship Date _80221 VIRGINIA SLIM GOLD 120
564 7 100053 10 2 CTN 37.29 372.90
Ship Date _80221 VIRGINIA SLIM GOLD MEN 120
564 6 100052 6 2 CTN 37.29 223.74
Ship Date _80221 VIRGINIA SLIM GOLD MEN BOX 100
564 5 100051 8 2 CTN 37.29 298.32
Ship Date _80221 VIRGINIA SLIM GOLD BOX 100
+
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

Enter the date in the **Ship Date** (6,n) field for the necessary items.

```

CVVLDFR      DISPLAY CDR Customer Conference              7/08/21 12:40:47
                  Edit Pre-Book Order
Customer 100900 JR FOOD MART - ABITA
Position Ship Date--> _____ Limit Item--> _____ Limit Order#--> 564
-----
Item _____ Qty _____ U/M _ Pending 10 Exported 0 SHOW PENDING
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message

      Ord / Line Item Qty U/M Price Extension
-----
564 10 119526 8 2 CTN 37.29 298.32
Ship Date _80621 VIRGINIA SLIM SILVER MEN BOX 100
564 9 100057 24 2 CTN 37.29 894.96
Ship Date _80621 VIRGINIA SLIM SILVER BOX 100
564 8 100054 8 2 CTN 37.29 298.32
Ship Date _80621 VIRGINIA SLIM GOLD 120
564 7 100053 10 2 CTN 37.29 372.90
Ship Date _80621 VIRGINIA SLIM GOLD MEN 120
564 6 100052 6 2 CTN 37.29 223.74
Ship Date _80621 VIRGINIA SLIM GOLD MEN BOX 100
564 5 100051 8 2 CTN 37.29 298.32
Ship Date _80621 VIRGINIA SLIM GOLD BOX 100
+
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

Press <F3> (Exit) when data entry is complete.

Editing Imported Item Data

HINODFR DISPLAY CDR Customer Conference 9/16/10 10:20:30				
Work with PBI Items				
Line Number	Actual Item	Imported Item		
D=Delete	?=Select	X=Alt.Select		
	Line	Item	Description	Pack UPC
	1	Actual 131761	BASIC FF 100 BOX	20PK 02820016220
Ovr UM		Imported 131761	B&H MENT 100 LT	20PK 2820010520
>>	2	Actual 787878	>>>ITEM NOT FOUND<<<	
Ovr UM		Imported 787878	BASIC FF 100 BOX	20PK 2820000620
	3	Actual 83	MARLBORO LIGHTS 100'S	2820010180
Ovr UM		Imported 83	MARLBORO LIGHT 100	20PK 2820010530
	4	Actual 119526	VIRGINIA SLIM MENT 100 BOX	20PK 02820013280
Ovr UM		Imported 119526	VIRGINIA SLIM MENT	20PK 2820013280
F3=Exit F4=Search F7=Customers F10=Add Item				

The “imported” item data appearing on the Work With PBI Items screen is derived from the vendor’s spreadsheet, and is subject to error. The item numbers of the imported data are used to select, from the distributor’s Item Master file, the “actual” item data which appears on the screen, and is used to create the pre-book orders.

Review each imported and actual item combination to determine which actual items may be invalid due to data errors in the vendor’s spreadsheet. Possible errors are illustrated above for the following line items:

- Line 1 - the descriptions and UPCs of the actual and imported items differ significantly.
- Line 2 - the imported item number could not be found in the distributor’s Item Master file.
- Line 3 - the UPCs of the actual and imported items differ significantly.

In each case, the user must determine what the actual item should be prior to continuing with the instructions below.

1. To review an item that may be invalid, enter ? (Select) in the selection column next to the actual item.

HINODFR DISPLAY CDR Customer Conference 9/16/10 10:20:30				
Work with PBI Items				
Line Number	Actual Item	Imported Item		
D=Delete	?=Select	X=Alt.Select		
	Line	Item	Description	Pack UPC
?	1	Actual 131761	BASIC FF 100 BOX	20PK 02820016220
Ovr UM		Imported 131761	B&H MENT 100 LT	20PK 2820010520
>>	2	Actual 787878	>>>ITEM NOT FOUND<<<	
Ovr UM		Imported 787878	BASIC FF 100 BOX	20PK 2820000620
	3	Actual 83	MARLBORO LIGHTS 100'S	2820010180
Ovr UM		Imported 83	MARLBORO LIGHT 100	20PK 2820010530
	4	Actual 119526	VIRGINIA SLIM MENT 100 BOX	20PK 02820013280
Ovr UM		Imported 119526	VIRGINIA SLIM MENT	20PK 2820013280
F3=Exit F4=Search F7=Customers F10=Add Item				

2. Press <Enter>. The Select Item screen appears.

```

HIONSRR  SELECT  CDR Customer Conference          9/16/10 10:21:24
                               Select Item
Item Description                Cat. Sales Prod. Tax   Vendor Sts
                               Class Class Class
Manufacturer #                  UPC
Type options, press Enter.
X>Select request
? Item Description                Item#  Ct Sales Prod. Tax
B&H MENT 100 LT                 20PK  108300 1 100 52 100 A
BASIC FF 100 BOX                20PK  131761 1 101 55 100 A
BEST VALUE MENT 100 LT         20PK  131200 1 101 56 100 A
BIC CLASSIC MED BLACK 2PK      902400 9 850
BIC LIGHTER COMFORT LITE       802680 9 850
BIC LIGHTER MINI CLASSIC 3PK   802662 9 850
BIC RED CHRYSAL                902026 9 850
BLACKJACK FULL FLAVOR 16OZ    770130 2 200
CAMEL FILTER 85 BOX           20PK  100500 1 100 51 100 A
CAPTAIN BLACK GOLD POUCH      6 PK  930030 2 300
CARLTON MENTHOL                20PK  101300 1 101 51 100 +
F3=Exit F4="Contains" Search F10=Toggle Status

```

3. If a valid item is located in the Select Item screen, select it. The Work With PBI Items screen appears.

```

HINODFR  DISPLAY CDR Customer Conference          9/16/10 12:47:36
                               Work with PBI Items
Line Number    Actual Item    Imported Item
D=Delete ?=Select X=Alt.Select
Line          Item      Description          Pack      UPC
>> 1 Actual 108300 B&H MENT 100 LT      20PK      02820010520
Ovr UM Imported 131761 B&H MENT 100 LT      20PK      2820010520
>> 2 Actual 787878 >>>ITEM NOT FOUND<<<
Ovr UM Imported 787878 BASIC FF 100 BOX      20PK      2820000620
3 Actual      83 MARLBORO LIGHTS 100'S
Ovr UM Imported 83 MARLBORO LIGHT 100      20PK      2820010530
4 Actual 119526 VIRGINIA SLIM MENT 100 BOX    20PK      02820013280
Ovr UM Imported 119526 VIRGINIA SLIM MENT    20PK      2820013280
F3=Exit F4=Search F7=Customers F10=Add Item

```

As illustrated above, double arrows (>>) appear next to the line number of an item to designate the following:

- Red arrows appear to warn the user that the item's data will not be included in pre-book orders.
 - Yellow arrows indicate that the actual and imported item numbers differ, but the actual item's data will be included in pre-book orders.
4. To delete an item from the pre-book import batch, enter *D* (Delete) in the selection column next to the actual item.

```

HINODFR   DISPLAY CDR Customer Conference                               9/16/10 13:56:14
                                     Work with PBI Items
Line Number      Actual Item      Imported Item
D=Delete  ?=Select  X=Alt.Select

      Line      Item  Description                      Pack  UPC
>>      1 Actual 108300 B&H MENT 100 LT             20PK  02820010520
Ovr UM  Imported 131761 B&H MENT 100 LT             20PK  2820010520

      >>      2 Actual 787878 >>>ITEM NOT FOUND<<<
Ovr UM  Imported 787878 BASIC FF 100 BOX             20PK  2820000620

      3 Actual      83 MARLBORO LIGHTS 100'S                2820010180
Ovr UM  Imported      83 MARLBORO LIGHT 100                20PK  2820010530

D      4 Actual 119526 VIRGINIA SLIM MENT 100 BOX        20PK  02820013280
Ovr UM  Imported 119526 VIRGINIA SLIM MENT              20PK  2820013280

F3=Exit F4=Search F7=Customers F10=Add Item

```

Press <Enter>.

```

HINODFR   DISPLAY CDR Customer Conference                               9/16/10 14:06:04
                                     Work with PBI Items
Line Number      Actual Item      Imported Item
D=Delete  ?=Select  X=Alt.Select

      Line      Item  Description                      Pack  UPC
>>      1 Actual 108300 B&H MENT 100 LT             20PK  02820010520
Ovr UM  Imported 131761 B&H MENT 100 LT             20PK  2820010520

      >>      2 Actual 131761 BASIC FF 100 BOX             20PK  02820016220
Ovr UM  Imported 787878 BASIC FF 100 BOX             20PK  2820000620

      3 Actual      83 MARLBORO LIGHTS 100'S                2820010180
Ovr UM  Imported      83 MARLBORO LIGHT 100                20PK  2820010530

F3=Exit F4=Search F7=Customers F10=Add Item

```

- To override the standard selling unit, enter the unit of measure for the **Ovr UM** field as illustrated below for line item 1.

```

HINODFR   DISPLAY CDR Customer Conference                               9/16/10 14:06:04
                                     Work with PBI Items
Line Number      Actual Item      Imported Item
D=Delete  ?=Select  X=Alt.Select

      Line      Item  Description                      Pack  UPC
>>      1 Actual 108300 B&H MENT 100 LT             20PK  02820010520
Ovr UM 1 Imported 131761 B&H MENT 100 LT             20PK  2820010520

      >>      2 Actual 131761 BASIC FF 100 BOX             20PK  02820016220
Ovr UM  Imported 787878 BASIC FF 100 BOX             20PK  2820000620

      3 Actual      83 MARLBORO LIGHTS 100'S                2820010180
Ovr UM  Imported      83 MARLBORO LIGHT 100                20PK  2820010530

F3=Exit F4=Search F7=Customers F10=Add Item

```

- To add an item to the pre-book import batch, press <F10> (Add Item). The Add Pre-book Batch Item window appears.
- Enter the item number for the **Item Number** field, press <Enter>, and press

<Enter> when prompted to confirm. The new actual item appears on the Work With PBI Items screen.

HINODFR		DISPLAY CDR Customer Conference			9/16/10 14:11:01		
		Work with PBI Items					
Line Number		Actual Item		Imported Item			
D=Delete		?=Select	X=Alt.Select				
Line		Item	Description	Pack	UPC		
>>	1	Actual 108300	B&H MENT 100 LT	20PK	02820010520		
Ovr UM		Imported 131761	B&H MENT 100 LT	20PK	2820010520		
>>	2	Actual 131761	BASIC FF 100 BOX	20PK	02820016220		
Ovr UM		Imported 787878	BASIC FF 100 BOX	20PK	2820000620		
	3	Actual	83 MARLBORO LIGHTS 100'S		2820010180		
Ovr UM		Imported	83 MARLBORO LIGHT 100	20PK	2820010530		
>>	4	Actual 119526	VIRGINIA SLIM MENT 100 BOX	20PK	02820013280		
Ovr UM		Imported	0				

F3=Exit F4=Search F7=Customers F10=Add Item

Editing Imported Customer Data

1. Press <F7> (Customers) to view the imported and actual customer data.

```
HINYDFR   DISPLAY Creative Data Research, Inc.          9/17/10 16:19:25
                                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select          Show All
Type options, press Enter.
ITEMS:  Item1 Item2 Item3 Item4 Item5 Item6 Item7 Item8 Item9 Item10
        131761 787878      83 119526
?
Cust  Address/City/State
>> Act 100111 >> Customer Not Found <<
Imp 100111 BOB'S SHELL, 23601 HWY 190, COVINGTON, LA
Qty   10    10    10    10

Act 380130 MISS STOP N GO #130, 2009 FOURTH ST, NORTH BRANCH, MS
Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
Qty    4     4     4     4

F2=Show/Hide F3=Exit F4=Show Item F7=Work with Items F8=Status F10=Add
```

Like the the Work With PB Items screen, both “imported” and “actual” data appears on the Work With Pre-book Import:Customer screen. The imported customer data (designated with **Imp**) is derived from the vendor’s spreadsheet, and is subject to error. The customer numbers of the imported data are used to select, from the distributor’s Customer Master file, the “actual” customer data (designated with **Act**) which appears on the screen, and is used to create the pre-book orders.

Review each imported and actual customer combinations to determine which actual customers may be invalid due to data errors in the vendor’s spreadsheet. Possible errors illustrated above include:

- The imported customer number *100111* could not be found in the distributor’s Customer Master file.
- The name and address of the actual and imported customer number *100850* differ significantly.

In each case, the user must determine what the actual customer should be prior to continuing with the instructions below.

2. To review a customer that may be invalid, enter ? (Select) in the selection column next to the actual customer.

```

HINYDFR   DISPLAY Creative Data Research, Inc.          9/17/10 16:19:25
                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select          Show All
Type options, press Enter.
ITEMS:  Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item10
        131761 787878      83 119526
?      Cust  Address/City/State
>> Act 100111 >> Customer Not Found <<
      Imp 100111 BOB'S SHELL, 23601 HWY 190, COVINGTON, LA
      Qty  10    10    10    10

?      Act 380130 MISS STOP N GO #130, 2009 FOURTH ST, NORTH BRANCH, MS
      Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
      Qty   4     4     4     4

F2=Show/Hide F3=Exit F4=Show Item F7=Work with Items F8=Status F10=Add

```

3. Press <Enter>. The Select Customer Master screen appears.

```

DSAASRR   SELECT Creative Data Research, Inc.          9/17/10 16:06:46
                Select Customer Master
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
B & D FOOD STORE      713 610-7701 20    771230 771230  A
BARON EXPRESS #2 BP   985 727-1141 10    100801 100801  A
BIG JOHN'S QUICK STOP #1 985 796-5252 DAVID 265000 260501  A
BIG P MINI MART       601 868-7050 20    320001 320001  A
BOB'S SHELL           985 871-5151 10    100003 100003  A
CRANKY CORNER QUICK STOP 985 796-8111 20    100802 100802  A
DANNY & CLYDE'S FOOD STORE #20 20    800237 800237  A
DIANNE'S GROCERY      985 892-0058 HARLAN 100002 100002  A
EXPRESS WAY FOOD MART 985 893-0099 20    100850 100850  A
GAS-N-SHOP #6         985 892-9919 HARLAN 100855 100855  A
JR FOOD MART - ABITA   985 893-6160 20    100900 100900  A +

F3=Exit

```

4. If a valid customer is located in the Select Customer Master screen, select it. The Work With Pre-book Import:Customer screen appears.

```

HINYDFR   DISPLAY Creative Data Research, Inc.          9/17/10 16:20:2
                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select          Show All
Type options, press Enter.
ITEMS:  Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item10
        131761 787878      83 119526
?      Cust  Address/City/State
>> Act 100111 >> Customer Not Found <<
      Imp 100111 BOB'S SHELL, 23601 HWY 190, COVINGTON, LA
      Qty  10    10    10    10

>> Act 380120 MISS STOP N GO #120, 3500 EAST SIDE BLVD, JACKSON, MS      N
      Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
      Qty   4     4     4     4

F2=Show/Hide F3=Exit F4=Show Item F7=Work with Items F8=Status F10=Add

```

As illustrated above, double arrows (>>) appear next to actual customer data to designate the following:

- Red arrows appear to warn the user that the customer's data will not be included in pre-book orders.

- Yellow arrows indicate that the actual and imported customer numbers differ, but the actual customer's data will be included in pre-book orders.

5. To delete a customer from the pre-book import batch, enter *D* (Delete) in the selection column next to the actual customer.

```

HINYDFR   DISPLAY Creative Data Research, Inc.          9/17/10 16:29:07
                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select          Show All
Type options, press Enter.
ITEMS:  Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item10
        131761 787878      83 119526
?       Cust  Address/City/State
D >> Act 100111 >> Customer Not Found <<
        Imp 100111 BOB'S SHELL, 23601 HWY 190, COVINGTON, LA
        Qty   10    10    10    10

        >> Act 380120 MISS STOP N GO #120, 3500 EAST SIDE BLVD, JACKSON, MS      N
        Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
        Qty    4    4    4    4

F2=Show/Hide  F3=Exit  F4=Show Item  F7=Work with Items  F8=Status  F10=Add

```

Press <Enter>.

```

HINYDFR   DISPLAY Creative Data Research, Inc.          9/17/10 17:01:06
                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select          Show All
Type options, press Enter.
ITEMS:  Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item10
        131761 787878      83 119526
?       Cust  Address/City/State
        >> Act 380120 MISS STOP N GO #120, 3500 EAST SIDE BLVD, JACKSON, MS      N
        Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
        Qty    4    4    4    4

F2=Show/Hide  F3=Exit  F4=Show Item  F7=Work with Items  F8=Status  F10=Add

```

6. To add a customer to the pre-book import batch, press <F10> (Add). The Add Customer window appears.

7. Enter the customer number for the **Customer Number** field, press <Enter>, and press <Enter> when prompted to confirm. The new actual customer appears on the Work With Pre-book Import:Customer screen.

```

HINYDFR      DISPLAY CDR Customer Conference          9/29/10  7:48:17
                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select          Show All
Type options, press Enter.
ITEMS:  Item1 Item2 Item3 Item4 Item5 Item6 Item7 Item8 Item9 Item10
        131761 787878      83 119526
?
>> Act 380120 MISS STOP N GO #120, 3500 EAST SIDE BLVD, JACKSON, MS      N
    Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
    Qty      4      4      4      4

>> Act 100002 DIANNE'S GROCERY, 78352 HWY 437, COVINGTON, LA      N
    Imp
    Qty

F2=Show/Hide  F3=Exit  F4=Show Item  F7=Work with Items  F8=Status  F10=Add

```

Adding A Vendor/Customer Refusal List

```

HINXDFR   DISPLAY CDR Customer Conference           7/13/21 12:41:12
                Work with Pre-Book Import Batches

2=Edit D=Delete Batch X=Create Pre-book Order(s) 5=Customer Log

? Batch#  Date      User      Imported From File
-      119  7/09/21  JEANNINE  Format B
-      118  7/09/21  JEANNINE  Format A
-      114  7/09/21  JEANNINE  Format A
                X

F3 F10=Ten Item Import F15=Pre-book Refusal Customers F23=Import Version2

```

1. Press <F15> (Pre-book Refusal Customers). Work with Vendor/Customer Promo Refusal List screen appears.

```

HISSDFR   DISPLAY CDR Customer Conference           7/13/21 12:42:09
                Work with Vendor/Customer Promo Refusal List
Vendor Cust#  Accept
                Promo?
                Use *ALL As Vendor# If Customer Refuses ALL Forceouts

Enter Vendor/Customer and F10 to Add.F6 Prints all Vendors - Restrict at Top
D=Delete
? Vendor Vendor Name      Cust#  Customer Name      Acpt?
- *ALL  ALL VENDORS!      320055 OCEAN SPRINGS QUICK STOP      N
- ALT001 ALTADIS USA      771230 B AND D FOOD STORE #230      N

F3=Exit F4=Search F6=Print F10=Add

```

2. Enter one of the following for the **Vendor** field (6,a):
 - The vendor code of the vendor whose deals are those in which the customer refuses to participate. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
 - **ALL* to designate that the customer refuses to participate in all the vendors' deals.
3. Enter the customer number for the **Cust#** (6,n) field to designate the customer who refuses to participate in the vendor's deals. If necessary, press <F4> to select a customer number from the Select Customer Master screen.

```

HISSDFR      DISPLAY CDR Customer Conference      7/13/21 13:10:16
                Work with Vendor/Customer Promo Refusal List
Vendor Cust#  Accept
              Promo?
PHI001 100850 _      Use *ALL As Vendor# If Customer Refuses ALL Forceouts

Enter Vendor/Customer and F10 to Add.F6 Prints all Vendors - Restrict at Top
D=Delete
? Vendor Vendor Name      Cust#  Customer Name      Acpt?
_ *ALL  ALL VENDORS!      320055 OCEAN SPRINGS QUICK STOP      N
_ ALT001 ALTADIS USA      771230 B AND D FOOD STORE #230      N

F3=Exit F4=Search F6=Print F10=Add

```

4. Press <Enter> and press <F10> (Add).

5. Enter *Y* when the *Add This Customer to the Promotional Refusal List for This Vendor?* message appears, and press <Enter>.

```

HISSDFR      DISPLAY CDR Customer Conference      7/13/21 13:12:43
                Work with Vendor/Customer Promo Refusal List
Vendor Cust#  Accept
              Promo?
_____ _ _ _ _      Use *ALL As Vendor# If Customer Refuses ALL Forceouts

Enter Vendor/Customer and F10 to Add.F6 Prints all Vendors - Restrict at Top
D=Delete
? Vendor Vendor Name      Cust#  Customer Name      Acpt?
_ *ALL  ALL VENDORS!      320055 OCEAN SPRINGS QUICK STOP      N
_ ALT001 ALTADIS USA      771230 B AND D FOOD STORE #230      N
_ PHI001 PHILLIP MORRIS INC. 100850 EXPRESS WAY FOOD MART      N

F3=Exit F4=Search F6=Print F10=Add

```

6. If desired, press <F6> (Print) to print the Print Prebook Refusals report.

7. Repeat the previous steps to continue adding vendor/customer combinations to the refusal list, and press <F3> (Exit) when data entry is complete. The Work With Pre-book Import Batches screen appears.

Working With Pre-book Reports

The Pre-book Reports application (option 6 of the Pre-Book Orders screen) is used to print the following reports:

- Print Pre-book Orders
- Print Pre-book Orders By Customer
- Print Pending Pre-book Orders
- Pre-booking By Ship Date
- Print Pre-book Orders By Route/Stop
- Customer Pre-book Notification Report
- Pre-book Vendor Recap Report
- Print Pre-book Orders (Cancelled)
- Pre-booking Item Summary
- Pre-book Recap By Group Reports - Pre-booking Vendor Recap, Pre-book Customer Recap and Pre-book Recap Summary.

The Customer Pre-book Notification Report and Pre-booked Items report can be emailed to customers. Refer to Emailing Pre-book Notifications for additional information.

1. Select option 10 (Other Functions Menu) from the Main Operations Menu screen. The Other Operations screen appears.

```
User: JEANNINE           Menu: OTHCV1           Date: 1/22/14
===== > O T H E R   O P E R A T I O N S < =====
|||||||
THE   ||                1. Archive Functions
DAC   ||                2. Unitrac (PMSTARS Etc.)
SYSTEM ||              3. QDN Interface
|||||||                4. E-Mail
|||                    5. Pre-Booked Order System
|||                    6. PMCM05 Program
|||                    7. Hershey Reporting
|||                    8. DEA Allocation
|||                    9. PERCS Reporting
|||                   10. NTS/Victory Reporting
|||                   11. Red Bull Reporting
|||                   M E N U   C A L L S
19. Other Operations 2  20. CDS Reporting           21. WAM/InfoMetrics
22.                   23. Dac Main Menu           90. Sign Off
=====
COPYRIGHT @1992-2004@ Creative Data Research, Inc.
==>
```

2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.

```

User: JEANNINE           Menu: PREBKC1           Date: 1/22/14

===== > P R E - B O O K   O R D E R S <=====
=====
|||||||||      1. Work with Prebook Orders
THE  ||      2. Work with Prebook Items
DAC  ||      3. Purge Prebook Orders
SYSTEM ||      4. Print Prebook Orders
|||||||||      5. Print Prebook Orders by Customer
|||||||||      6. Prebook Reports Menu
|||||||||      7. Work with Prebook Defaults
|||||||||      8. Create Prebook Orders from Defaults
|||||||||      9. Release Prebook Orders
|||||||||     10. Import Prebook Orders
|||||||||     11. Reprice ALL Prebook Orders
M E N U   C A L L S
19. Billing           20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu      90. Sign Off
=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
Selection or command
==>

```

3. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```

User: JEANNINE           Menu: PRBKRC1           Date: 11/20/14

===== > P R E B O O K   R E P O R T S <=====
=====
|||||||||      1. Buyer/Saleman           12. Audit Log
THE  ||      2. Customer Collection       13. User Opts
DAC  ||      3. Pending for Warehouse
SYSTEM ||      4. Buyer by Ship Date
|||||||||      5. Route/Date Notification (Driver)
|||||||||      6. Customer Notification (Alternate)
|||||||||      7. Vendor Recap
|||||||||      8. Cancelled Pre-Book Order Report
|||||||||      9. Prebook Item Summary by Date
|||||||||     10. Prebook Recap by Group
|||||||||     11. Customer Notification(Email)
M E N U   C A L L S
19. Prebooks           20. Billing           21.
22.                   23. Dac Main Menu   90. Sign Off
=====
==>

```

Printing A Print Pre-book Orders Report

The Print Pre-book Orders report details the pre-book orders yet-to-be exported per sales representative or buyer.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```
User: JEANNINE          Menu: PRBKRCV1          Date: 1/22/14
===== > P R E B O O K   R E P O R T S < =====
=====
|||||||
THE   ||          1. Buyer/Saleman                12. Audit Log
DAC   ||          2. Customer Collection
SYSTEM ||        3. Pending for Warehouse
|||||||          4. Buyer by Ship Date
|||||||          5. Route/Date Notification (Driver)
|||          6. Customer Notification (Alternate)
|||          7. Vendor Recap
|||          8. Cancelled Pre-Book Order Report
|||          9. Prebook Item Summary by Date
|||          10. Prebook Recap by Group
|||          11. Customer Notification (Email)
|||          M E N U   C A L L S
19. Prebooks          20. Billing                21.
22.                   23. Dac Main Menu          90. Sign Off
=====
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==>
```

2. Select option 1 (Buyer/Salesman) from the Pre-book Reports screen. The Prompt Pre-book Report screen appears.

```
XPREPVR  ENTER  CDR Customer Conference          1/22/14  9:35:06
                Prompt Pre-Book Report

                Input desired Data, then Press Enter
                Then Press CMD6

                Date Range: 000000 to 000000 (mmdyyy)

                Sequence by:

                X  Sales Rep: _____ (blanks=ALL Reps)
                  Page Break on Customer? N (Y or N)

                OR

                -  Buyer: _____ (blanks=ALL Buyers)
                  Warehouse _____ (optional)

                F3=Exit  F4=Prompt  F6=Print
```

3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to shipping dates.
4. To limit the orders included to the customers of a specific sales representative, enter an employee code for the **Sales Rep** (6,a) field. Users can press <F4> to select a code from the Select Employee Master screen.
5. To designate that the report breaks by customer, enter *Y* for the **Page Break on Customer?** (1,a) field.

6. To limit the orders included to the items of a specific vendor, enter an employee code for the **Buyer** (6,a) field. Users can press <F4> to select a code from the Select Employee Master screen.
7. To limit the report to items of a specific warehouse, enter a warehouse code for the **Warehouse** (6,a) field.
8. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Print Pre-book Orders By Customer Report

The Print Pre-book Orders By Customer report details the pre-book orders yet-to-be exported for a designated customer collection.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```
User: JEANNINE          Menu: PRBKRCV1          Date: 1/31/14
===== > P R E B O O K   R E P O R T S < =====
|||||
THE  ||          1. Buyer/Saleman          12. Audit Log
DAC  ||          2. Customer Collection
SYSTEM ||        3. Pending for Warehouse
|||||          4. Buyer by Ship Date
          5. Route/Date Notification (Driver)
          6. Customer Notification (Alternate)
          7. Vendor Recap
          8. Cancelled Pre-Book Order Report
          9. Prebook Item Summary by Date
          10. Prebook Recap by Group
          11. Customer Notification (Email)
          M E N U   C A L L S
19. Prebooks          20. Billing          21.
22.                  23. Dac Main Menu      90. Sign Off
=====
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==>
```

2. Select option 2 (Customer Collection) from the Pre-book Reports screen. The Prompt Pre-book Report screen appears.

```
XPREPV2  ENTER  CDR Customer Conference          1/30/14 15:23:04
           Prompt Pre-Book Report

           Input desired Data, then Press Enter
           Then Press CMD6

           Customer Collection: 00000

           Date Range: 000000 to 000000 (mmddy)

F3=Exit  F4=Prompt  F6=Print
```

3. Enter a customer collection number for the **Customer Collection** (5,n) field, or press <F4> to create and select a collection from the Select Customer Coll screen. Refer to Working With Customer Collections of the Customer File Maintenance document for additional information about creating a collection.
4. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to the shipping dates.
5. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Print Pending Pre-book Orders Report

The Print Pending Pre-book Orders report is printed weekly for use by warehouse personnel who prepare locations for new items.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```
User: JEANNINE           Menu: PRBKRCV1           Date: 1/31/14
=====
> P R E B O O K   R E P O R T S <=====
=====
|||||
THE   ||      1. Buyer/Saleman           12. Audit Log
DAC   ||      2. Customer Collection
SYSTEM ||     3. Pending for Warehouse
|||||      4. Buyer by Ship Date
|||||      5. Route/Date Notification (Driver)
|||      6. Customer Notification (Alternate)
|||      7. Vendor Recap
|||      8. Cancelled Pre-Book Order Report
|||      9. Prebook Item Summary by Date
|||     10. Prebook Recap by Group
|||     11. Customer Notification(Email)
|||     M E N U   C A L L S
19. Prebooks           20. Billing           21.
22.                   23. Dac Main Menu       90. Sign Off
=====
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==>
```

2. Select option 3 (Pending for Warehouse) from the Pre-book Reports screen. The Prompt Pre-book Pending Report screen appears.

```
XPREFVP  ENTER  CDR Customer Conference           1/31/14 11:57:56
           Prompt Pre-Book PENDING Report

           Input desired Data, then Press Enter
           Then Press CMD6

           Date Range: 000000 to 000000 (mmdyy)

           Select:

           PreBook Number: 0000000 (blanks=ALL PreBooks)
           Vendor Number:  _____ (blanks=ALL Vendors)
           Item Number: 000000 (blanks=ALL Items)
           Template or Order: 0 (T or O)

           F3=Exit F4=Prompt F6=Print
```

3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to the shipping dates.
4. Enter data as necessary for the following fields:
 - **PreBook Number** (7,n) - a pre-book order's number.
 - **Vendor Number** (6,a) - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
 - **Item Number** (6,n) - an item number. If necessary, press <F4> to select an item number from the Select Item By Description screen.
5. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Pre-booking By Ship Date Report

The Pre-booking By Ship Date report is printed by buyers.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```
User: JEANNINE           Menu: PRBKRCV1           Date: 1/31/14
===== > P R E B O O K   R E P O R T S < =====
|||||||
THE    ||                1. Buyer/Saleman                12. Audit Log
DAC    ||                2. Customer Collection
SYSTEM ||                3. Pending for Warehouse
|||||||                4. Buyer by Ship Date
|||||||                5. Route/Date Notification (Driver)
|||                6. Customer Notification (Alternate)
|||                7. Vendor Recap
|||                8. Cancelled Pre-Book Order Report
|||                9. Prebook Item Summary by Date
|||                10. Prebook Recap by Group
|||                11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks        20. Billing                21.
22.                 23. Dac Main Menu           90. Sign Off
=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
==>
```

2. Select option 4 (Buyer By Ship Date) from the Pre-book Reports screen. The Pre-booking By Ship Date screen appears.

```
GWREPVR  ENTER  CDR Customer Conference           1/31/14 13:44:26
                Prebooking by Ship Date

Type choices, press Enter.

                Ship Date _____

F3=Exit  F6=Print
```

3. Enter a date for the **Ship Date** (6,n) field.
4. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Print Pre-book Orders By Route/Stop Report

The Print Pre-book Orders By Route/Stop report is printed for delivery by drivers to customers in advance of their pre-book order deliveries.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```
User: JEANNINE          Menu: PRBKRCV1          Date: 1/31/14
===== > P R E B O O K   R E P O R T S < =====
|||||||
THE    !!              1. Buyer/Saleman                12. Audit Log
DAC    !!              2. Customer Collection
SYSTEM !!              3. Pending for Warehouse
|||||||              4. Buyer by Ship Date
|||              5. Route/Date Notification (Driver)
|||              6. Customer Notification (Alternate)
|||              7. Vendor Recap
|||              8. Cancelled Pre-Book Order Report
|||              9. Prebook Item Summary by Date
|||              10. Prebook Recap by Group
|||              11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks          20. Billing                21.
22.                   23. Dac Main Menu          90. Sign Off
=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
==>
```

2. Select option 5 (Route/Date Notification-Driver) from the Pre-book Reports screen. The Prompt Pre-book Report screen appears.

```
XPREP3  ENTER  CDR Customer Conference          1/31/14 14:32:52
          Prompt Pre-Book Report

          Input desired Data, then Press Enter
          Then Press CMD6

          Date Range: 000000 to 000000 (mddy)

          Route Range: _____ to _____

          Report Message:
          These items are prebook items for next week. You cannot return these items.
          If you have any questions please see store owner, supervisor, chain purchasing.
          Any other questions please call Customer Service. _____

          F3=Exit  F4=Prompt  F6=Print
```

3. Enter dates for the **Date Range:** and **to (6,n)** fields to limit the orders which are included in the report according to shipping dates.
4. Enter route codes for the **Route Range:** and **to (6,a)** fields to limit the orders which are included in the report according to delivery routes.
5. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Customer Pre-book Notification Report

The Customer Pre-book Notification Report is printed to notify customers in advance of their pre-book order deliveries. Refer to *Emailing Pre-book Notifications* for information about using Customer Notification-Email (option 11) to email the report as a PDF file attachment.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```

User: JEANNINE           Menu: PRBKRCV1           Date: 1/31/14

===== > P R E B O O K   R E P O R T S < =====
=====
|||||
THE   ||           1. Buyer/Saleman           12. Audit Log
DAC   ||           2. Customer Collection
SYSTEM ||          3. Pending for Warehouse
|||||           4. Buyer by Ship Date
|||||           5. Route/Date Notification (Driver)
|||||           6. Customer Notification (Alternate)
|||||           7. Vendor Recap
|||||           8. Cancelled Pre-Book Order Report
|||||           9. Prebook Item Summary by Date
|||||          10. Prebook Recap by Group
|||||          11. Customer Notification(Email)
|||||          M E N U   C A L L S
19. Prebooks    20. Billing                21.
22.            23. Dac Main Menu          90. Sign Off

=====
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==>

```

2. Select option 6 (Customer Notification-Alternate) from the Pre-book Reports screen. The Prompt Pre-Book Customer Notification Report screen appears.

```

XPREPVN  ENTER  CDR Customer Conference           1/31/14 14:49:04
          Prompt Pre-Book CUSTOMER NOTIFICATION Report

          Input desired Data, then Press Enter
          Then Press CMD6

          Date Range: 000000 to 000000 (mmddyy)

          Select:
          Customer Number: 000000 (blanks=ALL Customers)
          Deal Number: 0000000 (blanks=ALL DEALS)
          Salesman Number: _____ (blanks=All Salesmen)
          Corp Number: 000000 (blanks=All Corps)
          Vendor Number: _____ (blanks=ALL Vendors)

          Print Multi-Free Items? N (Y or N)
          Print Cost Price Info? Y (Y or N)
          Print Item# on Report? Y (Y or N)

          Detailed or Consolidated? D (D or C)

          Templates or Orders? 0 (T or O)

          F3=Exit F4=Prompt F6=Print

```

3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to shipping dates.
4. Enter data as necessary for the following fields:
 - **Customer Number** (6,n) - a customer's number. Users can press <F4> to select a customer from the Select Customer Master screen.
 - **Deal Number** (6,n) - a vendor deal's number.
 - **Salesman Number** (6,a) - a sales representative's employee code. Users can press <F4> to select a code from the Select Employee Master screen.

- **Corp Number** (6,n) - a corporate customer's number. Users can press <F4> to select a number from the Select Corporate Master screen.
 - **Vendor Number** (6,a) - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
 - **Print Multi-Free Items?** (1,a) - for use with a future upgrade of DAC.
5. Enter *N* for the **Print Cost Price Info?** (1,a) field to prohibit the printing of cost and price information on the report.
 6. Enter *N* for the **Print Item# on Report?** (1,a) field to prohibit the printing of item numbers on the report.
 7. Enter *C* for the **Detailed or Consolidated?** (1,a) field to print a report without the item detail.
 8. Enter *T* for the **Templates or Orders?** (1,a) field to print a report without pre-book order numbers.
 9. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Pre-book Vendor Recap Report

The Pre-book Vendor Recap Report is printed by buyers.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```

User: JEANNINE           Menu: PRBKRCV1           Date: 11/20/14
===== > P R E B O O K   R E P O R T S < =====
|||||||
THE   ||
DAC   ||
SYSTEM ||
|||||||
1. Buyer/Saleman           12. Audit Log
2. Customer Collection     13. User Opts
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks              20. Billing                21.
22.                       23. Dac Main Menu        90. Sign Off

==>

```

2. Select option 7 (Vendor Recap) from the Pre-book Reports screen. The Prompt Pre-book Vendor Recap Report screen appears.

```

XPREFVV  ENTER  CDR Customer Conference           11/20/14 13:20:03
           Prompt Pre-Book VENDOR RECAP Report

           Input desired Data, then Press Enter
           Then Press CMD6

           Date Range:  000000 to  000000  (mmddy)
           (blanks=ALL Dates)

Select:

PreBook Number:  0000000      (blanks=ALL PreBooks)

Vendor Number:   _____  (blanks=ALL Vendors)

Sequence:

Alpha or Numeric:  N          (A or N)

Templates or Orders:  0       (T or O)

F3=Exit  F4=Prompt  F6=Print

```

3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the items which are included in the report according to the shipping dates.
4. Enter data as necessary for the following fields:
 - **PreBook Number** (7,n) - a pre-book order's number.
 - **Vendor Number** (6,a) - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
5. Enter *A* for the **Alpha or Numeric** (1,a) field to print the items by description in alphanumeric order.
6. Enter *T* for the **Templates or Orders?** (1,a) field to print a report without pre-book order numbers.

7. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Report Of Cancelled Pre-book Orders

The Print Pre-book Orders report details the pre-book orders cancelled since the last time the report was printed.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```
User: JEANNINE           Menu: PRBKRCV1           Date: 11/20/14
===== > P R E B O O K   R E P O R T S <=====
=====
|||||
THE  ||
DAC  ||
SYSTEM ||
|||||
1. Buyer/Saleman
2. Customer Collection
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks
22.
20. Billing
23. Dac Main Menu
12. Audit Log
13. User Opts
21.
90. Sign Off

==>
```

2. Select option 8 (Cancelled Pre-book Order Report) from the Pre-book Reports screen. The Prompt For Cancelled Rpt screen appears.

```
GWU1PVR  ENTER  CDR Customer Conference           11/20/14 13:42:26
                          Prompt For Cancelled Rpt

This Program Will Print All Pre-Book Orders That Have Been Marked CANCELLED.
After The Report Prints, The Cancelled Orders Will Be Purged From The Pre-Book
Order File. Press Enter To Continue Or F3 To Exit Without Running.

F3=Exit
```

3. Press <Enter> to continue, and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Pre-booking Item Summary Report

The Pre-booking Item Summary report is provides a snapshot of the pre-booked items with totals in the warehouse.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```
User: JEANNINE          Menu: PRBKRCV1          Date: 11/20/14
===== > P R E B O O K   R E P O R T S <=====
=====
|||||
THE   ||          1. Buyer/Saleman          12. Audit Log
DAC   ||          2. Customer Collection      13. User Opts
SYSTEM ||         3. Pending for Warehouse
|||||           4. Buyer by Ship Date
|||||           5. Route/Date Notification (Driver)
|||            6. Customer Notification (Alternate)
|||            7. Vendor Recap
|||            8. Cancelled Pre-Book Order Report
|||            9. Prebook Item Summary by Date
|||           10. Prebook Recap by Group
|||           11. Customer Notification (Email)
|||           M E N U   C A L L S
19. Prebooks  20. Billing                21.
22.           23. Dac Main Menu          90. Sign Off

==>
```

2. Select option 9 (Prebook Item Summary by Date) from the Pre-book Reports screen. The Pre-book Item Summary screen appears.

```
GWMPVVR  ENTER  CDR Customer Conference          11/20/14 13:54:11
          Prebook Item Summary

Type choices, press Enter.

          From Date _____
          End Date   _____
          Pre-book#  _____ (Optional)

F3=Exit  F6=Print
```

3. Enter data as necessary for the following fields:
 - **From Date** and **End Date** (6,n) - date range to limit the items which are included in the report according to the shipping dates.
 - Optional: **Pre-book#** (7,n) - a pre-book order's number.
4. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing Pre-book Recap By Group Reports

The following pre-book recap reports can be printed for a group of pre-book defaults after pre-book orders built using the defaults are posted and end of day processing is completed:

- Pre-booking Vendor Recap is used for collecting from the vendor.
- Pre-book Customer Recap is a more detailed report used for auditing purposes.
- Pre-book Recap Summary is used to backup the vendor recap report.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```

User: JEANNINE           Menu: PRBKRCV1           Date: 11/20/14

===== > P R E B O O K   R E P O R T S < =====
=====
|||||
THE  ||           1. Buyer/Saleman           12. Audit Log
DAC  ||           2. Customer Collection       13. User Opts
SYSTEM ||         3. Pending for Warehouse
|||||             4. Buyer by Ship Date
|||||             5. Route/Date Notification (Driver)
|||||             6. Customer Notification (Alternate)
|||||             7. Vendor Recap
|||||             8. Cancelled Pre-Book Order Report
|||||             9. Prebook Item Summary by Date
|||||            10. Prebook Recap by Group
|||||            11. Customer Notification (Email)
|||||            M E N U   C A L L S
19. Prebooks     20. Billing                 21.
22.              23. Dac Main Menu         90. Sign Off

==>

```

2. Select option 10 (Prebook Recap by Group) from the Pre-book Reports screen. The Pre-book Recap by Group screen appears.

```

HIB5PVR  ENTER  CDR Customer Conference           11/20/14 14:45:10
Pre-Book Recap by Group

Print a Recap of The Final Results of a Group of Prebook Defaults

Prebook Group _

These Reports Only Reflect Complete Information AFTER the Prebooks Have
Posted in the Order File and Moved to Order History at End of Day.

The Prebooks Must Be Created Via "Prebook Defaults" and Auto Purging Prebooks
After Export Must Be Turned Off.

F3=Exit  F6=Print Vendor Recap  F8=Print Customer Recap  F10=Customer Summary

```

3. Enter a group code for the **Prebook Group** (1,a) field.
4. To print the Pre-booking Vendor Recap, press <F6>, and press <Enter> to confirm. The Pre-book Reports screen appears.

5. To print the Pre-book Customer Recap, press <F8>, and press <Enter> to confirm. The Pre-book Reports screen appears.
6. To print the Pre-book Recap Summary, press <F10>, and press <Enter> to confirm. The Pre-book Reports screen appears.

Emailing Pre-book Notifications

If outbound email functionality is enabled on the distributor's system, the Customer Pre-book Notification Report and Pre-booked Items report can be emailed as PDF file attachments to notify customers and the account's sales rep in advance of pre-book order deliveries.

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 DACEMAIL folder of the system. Refer to Emailing Pre-book Notifications of the System File Maintenance document for additional information.

1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```

User: JEANNINE           Menu: PRBKRCV1           Date: 7/23/15

======> P R E B O O K   R E P O R T S <=====
|||||||
THE   ||                1. Buyer/Saleman                12. Audit Log
DAC   ||                2. Customer Collection           13. User Opts
SYSTEM ||                3. Pending for Warehouse
|||||||                4. Buyer by Ship Date
                                           5. Route/Date Notification (Driver)
                                           6. Customer Notification (Alternate)
                                           7. Vendor Recap
                                           8. Cancelled Pre-Book Order Report
                                           9. Prebook Item Summary by Date
                                           10. Prebook Recap by Group
                                           11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks                20. Billing                21.
22.                        23. Dac Main Menu       90. Sign Off

==>

```

2. Select option 11 (Customer Notification-Email) from the Pre-book Reports screen. The Pre-Book Notification Report-Email screen appears.

```

HIVEPVR  ENTER  CDR Customer Conference           7/23/15  9:33:43
                Pre-Book Notification Report (Email)

Type choices, press Enter.

Date Range:  ____ To  ____

Customer #:  ____
Cust Coll #: ____

Salesman #:  ____
Corporate #:  ____

Email Reports?  _ Y (Y,N,Blank)
Version:        _ 1 (1,2)  Include Online? N  Include Remote? N

F3=Exit  F4=Search  F6=Print

```

3. Enter dates for the **Date Range:** and **To** (6,n) fields, and press <Field Exit> to limit the orders which are included in the report according to shipping dates.

4. To email the Customer Pre-book Notification Report, enter 2 for the **Version** (1,a) field, press <Field Exit>, press <Enter>, and enter data as necessary for the following fields:
 - **Customer #** (6,n) - a customer's number. Users can press <F4> to select a customer from the Select Customer Master screen.
 - **Cust Coll #** (5,n) - a customer collection number. Users can press <F4> to create and select a collection from the Select Customer Coll screen. Refer to Working With Customer Collections of the Customer File Maintenance document for additional information about creating a collection.
 - **Pre-book #** (7,n) - a pre-book order's number.
 - **Salesman #** (6,a) - a sales representative's employee code. Users can press <F4> to select a code from the Select Employee Master screen.
 - **Corporate #** (6,n) - a corporate customer's number. Users can press <F4> to select a number from the Select Corporate Master screen.
 - **Vendor #** (6,a) - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
 - **Print Multi-Free Items?** (1,a) - for use with a future upgrade of DAC.
 - **Print Cost Price Info?** (1,a) - enter *N* to prohibit the printing of cost and price information on the report.
 - **Print Item# on Report?** (1,a) - enter *N* to prohibit the printing of item numbers on the report.
 - **Detailed or Consolidated?** (1,a) - enter *C* to print a report without the item detail.
 - **Templates or Orders?** (1,a) - enter *T* to print a report without pre-book order numbers.

5. To email or print the Pre-booked Items report, enter 1 for the **Version** (1,a) field, press <Field Exit>, press <Enter>, and enter data as necessary for the following fields:
 - **Customer #** (6,n) - a customer's number. Users can press <F4> to select a customer from the Select Customer Master screen.
 - **Cust Coll #** (5,n) - a customer collection number. Users can press <F4> to create and select a collection from the Select Customer Coll screen. Refer to Working With Customer Collections of the Customer File Maintenance document for additional information about creating a collection.
 - **Salesman #** (6,a) - a sales representative's employee code. Users can press <F4> to select a code from the Select Employee Master screen.
 - **Corporate #** (6,n) - a corporate customer's number. Users can press <F4> to select a number from the Select Corporate Master screen.
 - **Email Reports** (1,a) - enter *Y* to email the report.
 - **Include Online?** (1,a) - enter *Y* to include the pre-booked items that currently appear as "live" orders on the Work With Orders screens.
 - **Include Remote?** (1,a) - enter *Y* to include the pre-booked items that were exported, but do not yet appear as "live" orders.

6. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.