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 neccesary, a vendor deal can be defined to handle the special pricing of a prebook 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 Prebook 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.

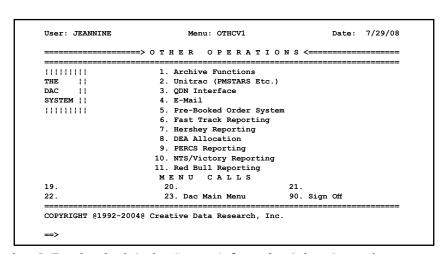
Working With Export Options

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.



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 <====
 111111111
                         1. Work With Pre-book Orders
THE ||
DAC ||
                         2. Work with Pre-book Items
                        3. Purge Pre-book Orders
SYSTEM !!
1111111111
                        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
                        MENU CALLS
20. Billing Files Maint. 21. Billing Reports
19. Billing
                                                    90. Sign Off
 22. Remote Orders
                          23. Dac Main Menu
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.

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

CVNRPVR 7/29/08 9:50:46 ENTER Creative Data Research, Inc. 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 ${}^\backprime P'$ 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. You may append to an existing order. Leave these options Append 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 P=Restrict to primary route. A=Any route will suffice Source Of Order W=WebConsole, O=On-Line (Keved), 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. Append HDR Msg. To All Detail Lines? (*YES,*NO) Msg. Append: . . F4=Prompt F7=Exit & Save Changes F3=Exit & Cancel 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* (Prebook) 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 neccesary, 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 neccesary, 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.

```
Date: 8/19/08
======> O T H E R O P E R A T I O N S <==========
                     1. Archive Functions
                     2. Unitrac (PMSTARS Etc.)
DAC
      1.1
                     3. QDN Interface
SYSTEM ||
                     4. E-Mail
                     5. Pre-Booked Order System
                      6. Fast Track Reporting
                      7. Hershev Reporting
                      8. DEA Allocation
                      9. PERCS Reporting
                     10. NTS/Victory Reporting
                     11. Red Bull Reporting
                              CALLS
19
                       20.
                                               21
                       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.

```
Menu: PREBKCV1
 =======> P R E-B O O K O R D E R S <===========
                        1. Work With Pre-book Orders
                        2. Work with Pre-book Items
                       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
                                 CALLS
                     20. Billing Files Maint. 21. Billing Reports
23. Dac Main Menu 90. Sign Off
19. Billing
22. Remote Orders
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.		6:29:01
	Work with Pre-Book Orde		
Pre-book P	re-book# Pre-book Cust# Vendor Deal#	W.H. Deal Code Co	ode
Ship Date	Order No.	Code Utilz #1 #	2
			OPEN
2=Edit 9=C	ancel C=Copy S=Select U=Unselect A=	=Select Available	
R=Reset Dat	28		
0 Gb: B+-	Cust	Pbk Code Cod	1- DL1-#
? Ship Dte	Cust		
		Order# #1 #2	='
9/30/08		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
	380110 MISS STOP N GO #110	34	2014
9/15/08			0014
	380130 MISS STOP N GO #130	36	2014
9/15/08	380130 MISS STOP N GO #130 320033 KINGS GROCERY	36 44	2014
9/15/08 9/13/08	380130 MISS STOP N GO #130 320033 KINGS GROCERY 320033 KINGS GROCERY		

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)
```

The Create using saved defaults? field does not appear on the Prompt Prebook 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
                                 Creation Date 8/19/08 Creation Time 17:17:50
Defaults for new detail lines:
Ship Date . . . .
                      100108
Warehouse Code . .
                              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 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 prebook 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.

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

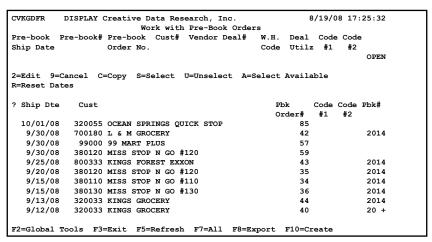
CVVLDFR	DISPLAY		ata Research, it Pre-Book O		8/19/0	8 17:24:02
			S QUICK STOP		_	
			Limit Item>		mit Order#>	85
					ed 0 SHOW	PENDING
S=Select	/Unselect	D=Delete	2=Edit Line	Properties	M=Message	
	Ord / Li	ne Item	Qty U/M 1	Price	Extension	
			4 2 BOX			
Ship	Date 1001	08 KEEBLER	PECAN SANDIES	S 2 OZ		
	85	3 631127	4 2 BAG	15.45	61.80	
Ship	Date 1001	08 KEEBLER	FUDGE STRIPE	COOKIES 11.	50Z	
	85	2 561759	4 2 BOX	11.30	45.20	
Ship	Date 1001	08 KEEBLER	CLUB CRACKER	5.25 OZ		
	85	1 561158	10 2 CTN	3.45	34.50	
Ship	Date 1001	08 KEEBLER	CHIPS DELUXE	20Z		
F2=Glb T	ools F3=Ex	it F5=Refre	sh F6=Access 1	F7=All F8=Ex	port 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.



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

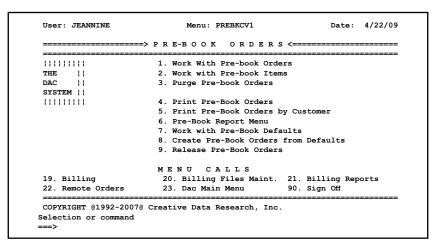
Using Work With Pre-book Orders To Export

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.

```
Menu: OTHCV1
User: JEANNINE
                                                        Date: 4/22/09
       ======> O T H E R O P E R A T I O N S <========
                      1. Archive Functions
                      2. Unitrac (PMSTARS Etc.)
                      3. QDN Interface
SYSTEM ||
                      4. E-Mail
111111111
                      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
                      MENU CALLS
19. Other Operations 2 20.
                                               21.
                       23. Dac Main Menu
                                               90. Sign Off
22.
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.



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.

```
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
                                                                 Code Code Pbk#
                                                       Order# #1 #2
  4/24/09 260501 BIG JOHN'S QUICK STOP #1
4/24/09 100900 JR FOOD MART - ABITA
4/24/09 320001 BIG P MINI MART
             320001 BIG P MINI MART
   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
QUALIFY:
Pre-book Number . . . .
Ship Date Range: From .
                            to
Item . . . . . . . . . . . . .
Warehouse . . . . . .
Vendor . . . . . . . . .
Route Range:
                                      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 Reg.)
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*).

```
4/22/09 12:31:45
CVMHPVR ENTER Creative Data Research, Inc.
                              Pre-book Global Tools
OHALTEY
Pre-book Number . .
Ship Date Range: From .
Item . . . . . . . . . . 439394 HERSHEY KISSES 12 OZ
Warehouse . . . . . .
Vendor . . . . . . . . .
Deal # . . . . . . . . .
Customer . . . .
                 From . to
Route Range:
                                              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.)
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
```

6. 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>.

```
ENTER Creative Data Research, Inc.
CVMHPVR
                                                                  4/22/09 12:32:11
                              Pre-book Global Tools
QUALIFY:
Pre-book Number . .
Ship Date Range: From .
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.)
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 12:33:11
                            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
4/24/09 100900 JR FOOD MART - ABITA
4/24/09 320001 BIG P MINI MART
                                                                   8
   4/24/09 800237 DANNY & CLYDE'S FOOD STORE #20
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
QUALIFY:
Pre-book Number .
Ship Date Range: From . 42209 to 42209
Deal # . . . . . . . . .
Customer . . . .
Route Range:
                                          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.)
           Action .
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
```

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

```
4/22/09 12:34:22
CVMHPVR
         ENTER Creative Data Research, Inc.
                             Pre-book Global Tools
QUALIFY:
Pre-book Number .
Ship Date Range: From . 42209 to 42209
Item . . . . . . . . . .
Warehouse . . . . . .
Deal # . . . . . . . . .
Customer . . . . .
Route Range:
                                             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.

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
```

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.

VKRDFR	DISPLAY	Creative Data	a Research Prompt for				4/22/09 12:36:05
Position t	o Custor	ner					
Position t	o Order	#					
							U=Unselect
Customer	/ Count	/ Route					
Order	Line	Item Qty	Descript	ion			Date
JR FOOD M	ART - AI	BITA / 1 Lines	s / 210				
8	2	439394 2	HERSHEY	KISSES	12	OZ	2009-04-22
BIG JOHN'	s QUICK	STOP #1 / 1 1	Lines /				
7	2	439394 2	HERSHEY	KISSES	12	OZ	2009-04-22
BIG P MIN	I MART /	/ 1 Lines / 50	00				
9	2	439394 2	HERSHEY	KISSES	12	OZ	2009-04-22
DANNY & C	LYDE'S I	FOOD STORE #20) / 1 Line	s / 400			
10	2	439394 2	HERSHEY	KISSES	12	OZ	2009-04-22
2=Glb Tool	s F3=Exi	it F4=Search 1	5=Refresh	F6=Pri	nt 1	F7=Option	s 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** redisplays 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** # redisplays 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

Order # Customer	Ship Date	Donl					
order # Cuscomer	Ship Date	Dear					
Line # Item	Qty Uni	it 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.

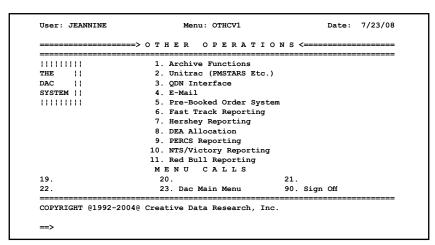
If necessary, refer to Working With Remote Orders of the Billing document for information about processing pre-book orders which appear on the Work With Remote Orders screen before they are uploaded by the user to appear as "live" orders on the Work With Orders screens.

Using Work With Pre-book Items To Export

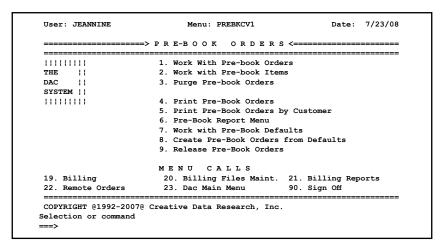
When the items of a pre-book order are available for shipping, the Work With Pre-book Items application can be used to *select* the pre-book order's items, then *export* the pre-book orders as new *Pick* type customer orders.

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.



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



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, Work with Pre-b		8/	14/08 1	3:43:49
Position to Item Limit to Warehouse Limi Limit to Vendor Limit to Deal Number	t to Pre-boo	k#		
Limit to Deal Utilization . (S=Standa Limit to Date Range: From To Limit to User Code #1 User Cod		X=None, Bl	-	
S=Select All U=Unselect All A=Select A ? Item Description	Total	Total	Total	
113200 MARLBORO 100 BOX	Demanded 10.00			
439336 HERSHEY PLAIN GIANT BAR	80.00		32	
561158 KEEBLER CHIPS DELUXE 20Z 631127 KEEBLER FUDGE STRIPE COOKIES 11.5	4.00		1242	0
770130 BLACKJACK FULL FLAVOR 160Z	52.00		3886	-
802680 BIC LIGHTER COMFORT LITE				
902400 BIC CLASSIC MED BLACK 2PK	14.00	.00	0	+
F2=Global Tools F3=Exit F5=Refresh F8=E	xport			

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** redisplays 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 Prebook 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, I Work with Pre-boo		8/	14/08 1	3:43:49
Position	to Item				
Limit to	Warehouse Limit	to Pre-bo	ok#		
Limit to	Vendor				
Limit to	Deal Number				
Limit to	Deal Utilization . (S=Standard	, T=Show,	X=None, Bl	ank=Any)
	Date Range: From To			-	
	User Code #1 User Code	#2 T	nclude Expo	rted? Y	(Y/N)
TIMIT TO	User Code #1 User Code	#2 1			
TIMIT TO	User Code #1 User Code	#2 1	noruae znpe		
	All U=Unselect All A=Select Ava		-		
S=Select			5=Details	Total	On
S=Select	All U=Unselect All A=Select Ava Description	ilable Total	5=Details	Total	
S=Select ? Item	All U=Unselect All A=Select Ava Description	ilable Total Demanded	5=Details Total Selected	Total Avail	Order
S=Select ? Item 113200	All U=Unselect All A=Select Ava Description MARLBORO 100 BOX	ilable Total Demanded	5=Details Total Selected .00	Total Avail	Order 0
S=Select ? Item 113200 439336	All U=Unselect All A=Select Ava Description MARLBORO 100 BOX HERSHEY PLAIN GIANT BAR	ilable Total Demanded 10.00	5=Details Total Selected .00	Total Avail 201	Order 0 0
S=Select ? Item 113200 439336 561158	All U=Unselect All A=Select Ava Description MARLBORO 100 BOX HERSHEY PLAIN GIANT BAR	Total Demanded 10.00 80.00 4.00	5=Details Total Selected .00 .00	Total Avail 201 32 1242	Order 0 0
S=Select ? Item 113200 439336 561158 631127	All U=Unselect All A=Select Ava Description MARLBORO 100 BOX HERSHEY PLAIN GIANT BAR KEEBLER CHIPS DELUXE 2OZ KEEBLER FUDGE STRIPE COOKIES 11.50	Total Demanded 10.00 80.00 4.00	5=Details Total Selected .00 .00	Total Avail 201 32 1242	Order 0 0 0
S=Select ? Item 113200 439336 561158 631127 770130	All U=Unselect All A=Select Ava Description MARLBORO 100 BOX HERSHEY PLAIN GIANT BAR KEEBLER CHIPS DELUXE 2OZ KEEBLER FUDGE STRIPE COOKIES 11.50	Total Demanded 10.00 80.00 4.00 80.00 52.00	5=Details Total Selected .00 .00 .00 .00	Total Avail 201 32 1242	Order 0 0 0 0

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.

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
Limit to Warehouse . . . . . Limit to Pre-book#
Limit to Vendor . . . . .
Limit to Deal Number . . . .
                         (S=Standard, T=Show, X=None, Blank=Any)
Limit to Deal Utilization .
Limit to Date Range: . . From To
Limit to User Code #1 . . . User Code #2
                                        Include Exported? N (Y/N)
Limit to User Code #1 . . .
S=Select All U=Unselect All A=Select Available 5=Details
 ? Item Description
 561158 KEEBLER CHIPS DELUXE 20Z 18.00 .00 1288 631127 KEEBLER FUDGE STRIPE COOKIES 11.50 100.00 .00 55
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 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 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.

- 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** redisplays 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** # redisplays 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

Order #	Customer	Ship Da	te Deal					
Line	# Item	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 Warehouse . . . . .
                                    Limit to Pre-book#
Limit to Vendor . . . . . .
Limit to Deal Number . . .

Limit to Deal Number . . .

Simit 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
  113200 MARLBORO 100 BOX
  439336 HERSHEY PLAIN GIANT BAR
  631127 KEEBLER FUDGE STRIPE COOKIES 11.50 100.00
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.

Work with Pre-book Items

Position to Item . . . .

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 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
```

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 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 On
Demanded Selected Avail Order
439394 HERSHEY KISSES 12 OZ 8.00 .00 114 0
```

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 Vendor . . . . .

Limit to Deal Number . . .

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

Limit to Date Range: . . From

Limit to User Code #1 . . . User Code #2 Include Exported? N
                                                              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
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 D	ISPLAY Cre	ative Data Research, Inc. Pre-book Demand for Item	4/22/09 14:00:12
Item 439394	HERSHEY KI	SSES 12 OZ	Deal Type:
Position to Limit to Cus Limit to Use	tomer .	Limit to Pre-book#	
	S=Select/	ter. Unselect for Export e Customer	Qty U/M
42209	7	2 BIG JOHN'S QUICK STOP #1	2 2 CSE
42209		-	2 2 CSE
42209		2 BIG P MINI MART	2 2 CSE
42209	10	2 DANNY & CLYDE'S FOOD STORE #2	0 2 2 CSE
42209	10	2 DANNY & CLYDE'S FOOD STORE #2	0 2 2 CSE
E3-Clobal ma	-1- 72-7-	it F4=Search F5=Reload F6=Acc	D.4

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** redisplays 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.

```
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
 * 42209 7 2 BIG JOHN'S QUICK STOP #1

* 42209 8 2 JR FOOD MART - ABITA

* 42209 9 2 BIG P MINI MART

* 42209 10 2 DANNY & CLYDE'S FOOD STORE #20
                                                                         2 2 CSE
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.

```
4/22/09 14:03:11
CVL2DFR DISPLAY Creative Data Research, Inc.
                           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 . . . .
                               (S=Standard, T=Show, X=None, Blank=Any)
Limit to Deal Utilization .
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
                                           Total Total Total
Demanded Selected Avail
? Item Description
                                                                         Order
  439394 HERSHEY KISSES 12 OZ
                                               8.00
                                                          8.00
                                                                114
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.

```
4/22/09 14:03:3
         DISPLAY Creative Data Research, Inc.
                               Prompt for Export
Position to Customer
Position to Order #
            ----- U=Unselect
 Customer / Count / Route
Order Line Item Qty Description
JR FOOD MART - ABITA / 1 Lines / 210
 8 2 439394 2 HERSHE
BIG JOHN'S QUICK STOP #1 / 1 Lines /
                                HERSHEY KISSES 12 OZ
                                                                     2009-04-2
                   439394 2
                                 HERSHEY KISSES 12 OZ
                                                                     2009-04-2
 BIG P MINI MART / 1 Lines / 500
 9 2 439394 2 HERSHEY KISSES 12 OZ
DANNY & CLYDE'S FOOD STORE #20 / 1 Lines / 400
                                                                     2009-04-2
                                HERSHEY KISSES 12 OZ
            2 439394 2
                                                                     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** redisplays 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** # redisplays 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

reative Data Research, Inc. Print Pr	o zoon oracı	_	JEANN	INE CVNCP		4/22/09 14:04:19 Page	1
order # Customer	Ship Date	Deal					
Line # Item	Qty Un	it 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
Limit to User Code #1 . . . User Code #2 Include Exported? N
                                                     Include Exported? N (Y/N)
S=Select All U=Unselect All A=Select Available 5=Details
                                                Total Total Total On
Demanded Selected Avail Order
? Item Description
  439336 HERSHEY PLAIN GIANT BAR
                                               28.00 .00 9
8.00 8.00 114
                                                                                     0
  439394 HERSHEY KISSES 12 OZ
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
                                                       Include Exported? N (Y/N)
Limit to User Code #1 . . .
S=Select All U=Unselect All A=Select Available 5=Details
                                                Total Total On
Demanded Selected Avail Order
? Item Description
  439336 HERSHEY PLAIN GIANT BAR
                                               28.00 .00 9
8.00 8.00 114
  439394 HERSHEY KISSES 12 OZ
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.

4. Press <Enter>.

```
CVL2DFR
                                                                     4/22/09 15:44:38
           DISPLAY Creative Data Research, Inc.
                              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

Limit to User Code #1 . . . User Code #2 Include Exported? N
Limit to Deal Number .
                                                      Include Exported? N (Y/N)
S=Select All U=Unselect All A=Select Available 5=Details
                               Total Total Total On
Demanded Selected Avail Order
? Item Description
                                                    8.00 8.00
                                                28.00
  439336 HERSHEY PLAIN GIANT BAR
  439394 HERSHEY KISSES 12 OZ
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.

```
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
  Date

* 42409 7 1 BIG JOHN'S QUICK STOP #1

* 42409 8 1 JR FOOD MART - ABITA

* 42409 9 1 BIG P MINI MART

* 42409 10 1 DANNY & CLYDE'S FOOD STORE #20

42409 11 1 EXPRESS WAY FOOD MART
                                                                                      2 2 BOX
2 2 BOX
                                                                                      2 2 BOX
2 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 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 On
Demanded Selected Avail Order
                                             28.00 8.00
8.00 8.00
 439336 HERSHEY PLAIN GIANT BAR
  439394 HERSHEY KISSES 12 OZ
                                                                      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.

	U=Unselect
Customer / Count / Route	U=Unselect
Customer / Count / Route	U=Unselect
Order Line Item Oty Description	
k-, Debellpelen	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

- 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** redisplays 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** # redisplays 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 Pr			JEANN	INE CVNCE		4/22/09 15:47:37 Page	1
Order # Customer	Ship Date	Deal					
Line # Item	Qty Un	it 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.

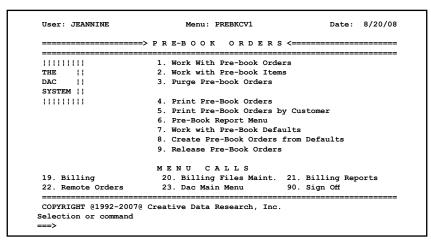
If necessary, refer to Working With Remote Orders of the Billing document for information about processing pre-book orders which appear on the Work With Remote Orders screen before they are uploaded by the user to appear as "live" orders on the Work With Orders screens.

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.



- 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 necesary, press <F7> (All) to include pre-book orders without pending items on the screen's list.

CVKGDFR I	DISPLAY Creative Data Research, Inc.	8/20/0	8 10:40:24
	Work with Pre-Book Orde	rs	
Pre-book P	re-book# Pre-book Cust# Vendor Deal#	W.H. Deal Code	Code
Ship Date	Order No.	Code Utilz #1	#2
			*ALL
0 = 1:. 0 0	1 00 001 1 77 1 1 1		
R=Reset Date	ancel C=Copy S=Select U=Unselect A=	Select Available	
K=Keset Date	38		
? Ship Dte	Cust	Pbk Code	Code Pbk#
•		Order# #1	#2
10/01/08	320055 OCEAN SPRINGS QUICK STOP	85	
9/30/08	770001 TEXAS TRUCK STOP	32	2014
9/30/08	700180 L & M GROCERY	42	2014
3,30,00			
9/30/08	99000 99 MART PLUS	57	
		57 59	
9/30/08	380120 MISS STOP N GO #120	- ·	2014
9/30/08 9/30/08	380120 MISS STOP N GO #120 800333 KINGS FOREST EXXON	59	2014 2014
9/30/08 9/30/08 9/25/08	380120 MISS STOP N GO #120 800333 KINGS FOREST EXXON 380120 MISS STOP N GO #120	59 43	
9/30/08 9/30/08 9/25/08 9/20/08	380120 MISS STOP N GO #120 800333 KINGS FOREST EXXON 380120 MISS STOP N GO #120 380110 MISS STOP N GO #110	59 43 35	2014

- 3. 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.
- 4. 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.

```
8/20/08 10:45:42
CVVLDFR
           DISPLAY Creative Data Research, Inc.
Customer 320055 OCEAN SPRINGS QUICK STOP
Position Ship Date--> Limit Item-->
                                                       Limit Order#-->
Item Qty U/M Pending 4 Exported 0 SHC S=Select/Unselect D=Delete 2=Edit Line Properties M=Message
                                                                  0 SHOW PENDING
          Ord / Line Item Qty U/M
85 4 561161 4 2 1
                                                                  54.60
                                  4 2 BOX 13.65
    Ship Date 100108 KEEBLER PECAN SANDIES 2 OZ
                   3 631127
                                                  15.45
          85
                                 4 2 BAG
    Ship Date 100108 KEEBLER FUDGE STRIPE COOKIES 11.50Z
                                                  11.30
    85 2 561759 4 2 BOX 11.30
Ship Date 100108 KEEBLER CLUB CRACKER 5.25 OZ
                                                                   45 20
    85 1 561158 10 2 CTN
Ship Date 100108 KEEBLER CHIPS DELUXE 20Z
                                                   3.45
                                                                   34.50
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr
```

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

```
CHANGE Creative Data Research, Inc.
                                                                          8/20/08 10:47:22
                            Edit Pre-Book Order Hdr Details
                                85
Pre-Book Order Number
Customer Number . : 320055 OCEAN SPRINGS QUICK STOP
                                      Creation Date 8/19/08 Creation Time 17:17:50
Status 1 Open
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 Bookin
                             21 Keebler Standard Booking
User Code #2 . . .
Special Message 1 . Keebler Standard Booking
Special Message 2 .
Special Message 3 .
F3=Cancel & Exit F4=Search F9=Save as Default
```

- 6. 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.
- 7. 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.

```
CVVKEIR 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 #1 . .
User Code #2 . .

Special Message 1 . Keebler Standard Booking
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 prebook 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.

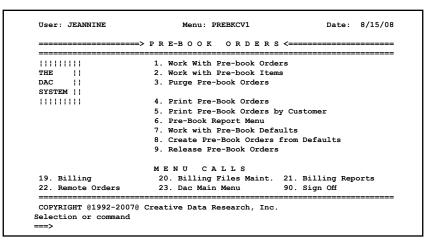
- 12. Press <F9> (Save as Default) to save this order's header details as the user's prebook order creation default values.
- 13. To save the order header details for the current order, press <Enter> (Update & Exit) and Press <Enter> when prompted to confirm; otherwise, press <F3> (Cancel & Exit). The 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



- 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 necesary, press <F7> (All) to include pre-book orders without pending items on the screen's list.

CVKGDFR DISPLAY	Creative Data Research, Inc. Work with Pre-Book Order	8/15/08 10	6:42:09
Pre-book Pre-book#	Pre-book Cust# Vendor Deal#	W.H. Deal Code Cod	de
Ship Date	Order No.	Code Utilz #1 #2	2
			*ALL
2=Edit 9=Cancel C	=Copy S=Select U=Unselect A=S	Select Available	
R=Reset Dates	s copi is serious is onserious in s		
? 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	
9/30/08 380120	MISS STOP N GO #120	59	
9/25/08 800333	KINGS FOREST EXXON	43	2014
	MISS STOP N GO #120	35	2014
	MISS STOP N GO #110	34	2014
9/15/08 380110	MISS STOP N GO #110 MISS STOP N GO #130	34 36	2014 2014
9/15/08 380110 9/15/08 380130		~ -	

3. 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
            Date--> Limit Item--> Limit Order#--> 42
Position Ship Date-->
                             Pending 1 Exported
                      U/M
           Qty
                                                      1 SHOW PENDING
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message
                ine Item Qty U/M Price
1 770130 4 2 EA 6.82
          42
                                                        27.28
   Ship Date 80108 BLACKJACK FULL FLAVOR 160Z
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr
```

4. If necesary, 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#-->
                                   U/M
                                            Pending
                                                           1 Exported
                                                                                    1 SHOW ALL
Item
                 Qty
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message
             Ord / Line Item
                        ine Item Qty U/M P.
2 561158 8 2 CTN
                                                         Price
                                                                           Extension
               42

        Ship Date
        80108
        KEEBLER CHIPS DELUXE
        20Z

        42
        1
        770130
        4
        2
        EA
        6

        Ship Date
        80108
        BLACKJACK FULL
        FLAVOR
        160Z

                                                                 6.82
                                                                                      27.28
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr
```

5. 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.

Cem Qty U/M Pending 4 Exported 0 SHOW ALL 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 CONCRIES 11.50Z 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											Order#>		29
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 11.50Z 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												ALL	
29 4 113200 10 2 CTN 29.46 294.60 Ship Date 81808 MARIBORO 100 BOX 29 3 631127 10 2 BAG 15.45 154.50 Ship Date 81808 KEEBLER FUDGE STRIPE COOKIES 11.50Z 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	S=Select,	/Unsel	lect	D=Delete	2=1	Edit	Line	Prop	erties	M=	Message		
29 4 113200 10 2 CTN 29.46 294.60 Ship Date 81808 MARIBORO 100 BOX 29 3 631127 10 2 BAG 15.45 154.50 Ship Date 81808 KEEBLER FUDGE STRIPE COOKIES 11.50Z 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		Ord	/ Line	Item	Otv	U/M		Price		Ext	ension		
29 3 631127 10 2 BAG 15.45 154.50 Ship Date 81808 KEEBLER FUDGE STRIPE COOKIES 11.50Z 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 KEEBLER FUDGE STRIPE COOKIES 11.50Z 29 2 802680 2 2 81.688 33.76 Ship Date 81808 BIC LIGHTER COMFORT LITE 29 1 439336 10 2 BOX 38.40 384.00	Ship	Date	81808	MARLBOI	RO 10	0 воз	ζ.						
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		29	3	631127	10	2	BAG		15.45		154.50		
Ship Date 81808 BIC LIGHTER COMFORT LITE 29 1 439336 10 2 BOX 38.40 384.00	Ship	Date	81808	KEEBLEI	R FUD	GE S	TRIPE	COOR	IES 11.	50Z			
29 1 439336 10 2 BOX 38.40 384.00		29	2	802680	2	2	EA		16.88		33.76		
	Ship	Date	81808	BIC LIC	HTER	COM	FORT	LITE					
al' p. 1. 01000 umpaumu pratu ataum pap		29	1	439336	10	2	BOX		38.40		384.00		
Ship Date 81808 HERSHEY PLAIN GIANT BAR	Ship	Date	81808	HERSHE	PLA:	IN G	TNAI	BAR					

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** redisplays 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.

```
DISPLAY Creative Data Research, Inc.
                            Edit Pre-Book Order: DTE
Customer 700180 L & M GROCERY
Position Ship Date--> Limit Item--> Limit Orde
                                                    Limit Order#-->
0 SHOW ALL
    Ord / Line Item Qty U/M Price Extension
29 5 902400 10 2 EA .63 6
Ship Date 81808 BIC CLASSIC MED BLACK 2PK
29 4 113200 10 2 CTN 29.46 294
                                                              6.30
    Ship Date 81808 MARLBORO 100 BOX
    29 3 631127 10 2 BAG 15.45
Ship Date 81808 KEEBLER FUDGE STRIPE COOKIES 11.50Z
                                                               154.50
                  2 802680
                                                                33.76
    Ship Date 81808 BIC LIGHTER COMFORT LITE
    29 1 439336 10 2 BOX 38.40
Ship Date 81808 HERSHEY PLAIN GIANT BAR
                                                               384.00
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 <===
111111111
                        1. Work With Pre-book Orders
THE ||
DAC ||
                        2. Work with Pre-book Items
                        3. Purge Pre-book Orders
SYSTEM !!
111111111
                        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
                        MENU CALLS
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.
```

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.		12:14:33
	Work with Pre-Book Order:	s	
Pre-book P	re-book# Pre-book Cust# Vendor Deal#	W.H. Deal Code	Code
Ship Date	Order No.	Code Utilz #1	#2
			OPEN
eEdit 9=C	ancel C=Copy S=Select U=Unselect A=Se	elect Available	
Ship Dte	Cust		ode Pbk#
			#2
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	
	770001 TEXAS TRUCK STOP	32	2014
8/02/08	320092 LIL SHORT STOP - OCEAN SPRINGS	28	
8/02/08 8/01/08	320092 LIL SHORT STOP - OCEAN SPRINGS		
8/01/08	700180 L & M GROCERY	29	
8/01/08 8/01/08			2014

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.

						rder: DTE	8/07/	00 12:12:10
Customer	3801	110 MIS	S STOP N	GO #110				
							imit Order#>	
							ted 1 SHOW	
S=Select	/Unsel	lect	D=Delete	2=Edi	t Line	Properties	M=Message	
	Ord	/ Line	Item	Qty U/	м	Price	Extension	
	58	1	439336	40 2	BOX	38.40	1536.00	
Ship	Date	80108	HERSHEY	PLAIN	GIANT	BAR		
	58	6	439393	2 2	CS	70.20	140.40	
Ship	Date	80808	HERSHEY	MINIAT	URES 1	2 OZ		
	58	3	631127	10 2	BAG	15.45	154.50	
Ship	Date	80808	KEEBLER	FUDGE	STRIPE	COOKIES 11	.50Z	
	58	5	902400	2 2	EA	. 63	1.26	
Ship	Date	81408	BIC CLA	SSIC ME	D BLAC	K 2PK		
	58	2	802680	2 2	EA	16.88	33.76	
Chin	Date	83008	BIC LIG	HTER CO	MFORT	LITE		

- 3. 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.
- 4. Enter *D* (Delete) in the selection column next to the item's order number.

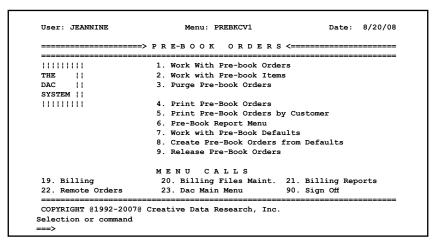
Posi				S STOP N	Limi	t Item-	->	Li	mit Orde	r#>	58
Item		<u>c</u>	ty	 U/M		ending	5	Export	ed 1	SHOW	PENDING
S=Se	lect	/Unsel	ect	D=Delete	2=E	dit Lin	e Prope	rties	M=Mess	age	
		Ord	/ Line	Item	Qtv	U/M	Price		Extensi	.on	
D				439336							
	Ship	Date	80108	HERSHEY	PLAI	N GIANT	BAR				
		58	6	439393	2	2 CS	7	0.20	1	40.40	
	Ship	Date	80808	HERSHEY	MINI	ATURES	12 OZ				
		58	3	631127	10	2 BAG	1	5.45	1	54.50	
	Ship	Date	80808	KEEBLER	FUDG	E STRIP	E COOKI	ES 11.	50Z		
		58	5	902400	2	2 EA		. 63		1.26	
	Ship	Date	81408	BIC CLA	SSIC	MED BLA	CK 2PK				
		58	2	802680	2	2 EA	1	6.88		33.76	
	Ship	Date	83008	BIC LIG	HTER	COMFORT	LITE				

- 5. Press <Enter> to remove the item from the screen's list.
- 6. 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.

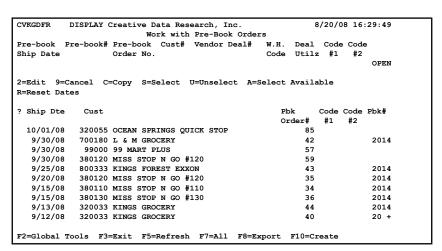
Changing A Pre-book Order's Header Details

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.



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. 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.

3. 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
                                                 Limit Order#-->
1 SHOW PENDING
   Ord / Line Item Qty U/M Price
60 5 902026 2 2 EA 1.39
Ship Date 91208 BIC RED CHRYSTAL
                                                          2.78
                 3 631127 10 2 BAG
                                                         154.50
   Ship Date 91208 KEEBLER FUDGE STRIPE COOKIES 11.50Z
   60 2 802680 2 2 EA 16.88

Ship Date 91208 BIC LIGHTER COMFORT LITE
60 1 439336 10 2 BOX 38.40
                                                          33 76
                                                          384.00
   Ship Date 91208 HERSHEY PLAIN GIANT BAR
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.
                                                                    8/20/08 17:00:33
                         Edit Pre-Book Order Hdr Details
                              60
Pre-Book Order Number
Customer Number . : 380130 MISS STOP N GO #130
                                   Creation Date 8/16/07 Creation Time 15:06:08
Status 1 Open
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 prebook 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.

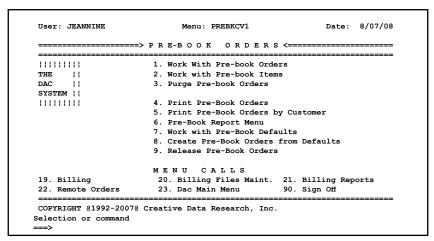
Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document for information about creating invoice messages that are printed on every customer's invoices.

- 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.



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, I	nc.	8,	07/08 1	6:16:45
Work with Pre-boo	k Items			
Position to Item				
Limit to Warehouse Limit	to Pre-h	ook#		
Limit to Vendor				
Limit to Deal Number				
Limit to Deal Utilization . (S=Standard	, T=Show	, X=None, B	Lank=Any)
Limit to Date Range: From To				
				/V/M)
Limit to User Code #1 User Code	#2	Include Expo	ortea? N	(1/14)
Limit to User Code #1 User Code	#2	Include Expo	ortea? N	(1/N)
Limit to User Code #1 User Code S=Select All U=Unselect All A=Select Ava		_	orted? N	(1/N)
		5=Details	Total	
S=Select All U=Unselect All A=Select Ava ? Item Description	ilable	5=Details Total	Total	On
S=Select All U=Unselect All A=Select Ava ? Item Description	ilable Total Demanded	5=Details Total	Total Avail	On
S=Select All U=Unselect All A=Select Ava ? Item Description	ilable Total Demanded	5=Details Total Selected	Total Avail	On Order 0
S=Select All U=Unselect All A=Select Ava ? Item Description 108300 B&H MENT 100 LT 113200 MARLBORO 100 BOX	ilable Total Demanded	5=Details Total Selected .00	Total Avail 276	On Order 0
S=Select All U=Unselect All A=Select Ava ? Item Description 108300 B&H MENT 100 LT 113200 MARLBORO 100 BOX	ilable Total Demanded 5.00	5=Details Total Selected .00 .00	Total Avail 276 201	On Order 0
S=Select All U=Unselect All A=Select Ava ? Item Description 108300 B&H MENT 100 LT 113200 MARLBORO 100 BOX 439336 HERSHEY PLAIN GIANT BAR	ilable Total Demanded 5.00 10.00 80.00	5=Details Total Selected .00 .00 .00	Total Avail 276 201 32	On Order 0 0 0
S=Select All U=Unselect All A=Select Ava ? Item Description 108300 B&H MENT 100 LT 113200 MARLBORO 100 BOX 439336 HERSHEY PLAIN GIANT BAR 439393 HERSHEY MINIATURES 12 OZ	ilable Total Demanded 5.00 10.00 80.00 2.00 4.00	5=Details Total d Selected 0 .00 0 .00 0 .00 0 .00	Total Avail 276 201 32 2000	On Order 0 0 0

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.

	DISPLAY Creative Data Research, : Work with Pre-boo		8/	07/08 1	6:19:50
	110211 1120 200	011 2 001110			
Position	to Item 631127 KEEBLI	ER FUDGE S	STRIPE COOKI	ES 11.5	οz
Limit to	Warehouse Limit	to Pre-bo	ook#		
Limit to	Vendor				
Limit to	Deal Number				
Limit to	Deal Utilization . (S=Standard	d, T=Show,	X=None, Bl	ank=Any)
Limit to	Date Range: From To				
Limit to	User Code #1 User Code	#2 I	Include Expo	rted? N	(Y/N)
S=Select	All U=Unselect All A=Select Ava	ailable			
? Item	Description	Total		Total	
			Selected	Avail	Order
631127	KEEBLER FUDGE STRIPE COOKIES 11.50	90.00	.00	15	0
	BLACKJACK FULL FLAVOR 160Z	44.00	.00	3886	0
770130					•
	BIC LIGHTER MINI CLASSIC 3PK	1.00	.00	1313	-
802662	BIC LIGHTER MINI CLASSIC 3PK BIC LIGHTER COMFORT LITE			1313 1714	0

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	Creat	ive Data Research, Inc. Pre-book Demand for Ite		8/07/	08 1	6:22:	30	
Item 63112	27 KEEBLE	R FUDG	E STRIPE COOKIES 11.50Z	Dea	al Ty	pe:			
Position t	-		Limit to Pre-book#						
Limit to U	Jser Code	#1							
Type option 2=Edit Lin			r. select for Export						
? Ship	Order /	Line	Customer		Qty	U/M			
Date		_				_			
73008			USA CONVENIENCE STORE #20		10	2	BAG		
	3 51		USA CONVENIENCE STORE #30		10	2	BAG		
73008			USA CONVENIENCE STORE #40		10		BAG		
73008	53	3	USA CONVENIENCE STORE #50	00	10	2	BAG		
73008	54	3	USA CONVENIENCE STORE #60	00	10	2	BAG		
80108	3 29	3	L & M GROCERY		10	2	BAG		
80108	3 59	3	MISS STOP N GO #120		10	2	BAG		
80108	60	3	MISS STOP N GO #130		10	2	BAG	+	
T0-01-b-1	maala E	2_0	F4=Search F5=Reload F6	-Accoss Dato	F0_	F			

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** redisplays 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.

```
CVKPEIR CHANGE Creative Data Research, Inc. 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)
```

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

CVKVDFR	DISPLAY	Creati	ve Data Research, Inc. Pre-book Demand for Item	8/15/	80	9:48:22
Item 63112	27 KEEBLEI	R FUDGE	STRIPE COOKIES 11.50Z	Deal Ty	pe:	
Position 1	to Ship Da	ate	Limit to Pre-book#			
Limit to (Customer					
Limit to U	Jser Code	#1				
? Ship		ect/Uns	select for Export	Qty	U/M	I
Date 73008	p 50	3	USA CONVENIENCE STORE #200	10	2	BAG
73008			USA CONVENIENCE STORE #200	10		BAG
73008			USA CONVENIENCE STORE #400	10		
73008			USA CONVENIENCE STORE #500	10	2	BAG
73008	8 54	3	USA CONVENIENCE STORE #600	10	2	BAG
80108	3 29	3	L & M GROCERY	10	2	BAG
80108	59	3	MISS STOP N GO #120	10	2	BAG
80108	8 60	3	MISS STOP N GO #130	10	2	BAG
F2=Global	Tools F	B=Exit	F4=Search F5=Reload F6=Access	Date F8=	Expo	ort

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

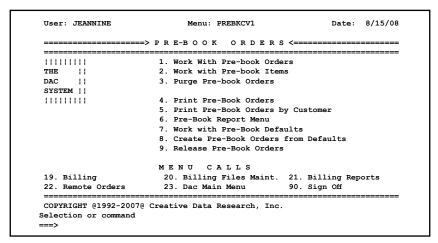
CVKVDFR DI	ISPLAY Cr	eativ	ve Data Research, Inc. Pre-book Demand for Item	8/15/0	8 !	9:50:46
Item 631127 F	KEEBLER F	TUDGE	STRIPE COOKIES 11.50Z	Deal Typ	e:	
Position to S	Ship Date	•	Limit to Pre-book#			
Limit to Cust	comer .					
Limit to User	Code#1					
Type options,	, press E	Inter.	•			
2=Edit Line	S=Select	:/Unse	elect for Export			
? Ship Or	der / Li	ne (Customer	Qty	U/M	
Date						
			JSA CONVENIENCE STORE #200		2	BAG
73008	50	3 (JSA CONVENTENCE STORE #200	10	~	
73008 73008	50 51		JSA CONVENIENCE STORE #200 JSA CONVENIENCE STORE #300	10	_	BAG
73008		3 t			2	
73008	51	3 t	JSA CONVENIENCE STORE #300	10	2	BAG
73008 73008	51 52	3 t 3 t	JSA CONVENIENCE STORE #300 JSA CONVENIENCE STORE #400	10 10	2 2	BAG BAG
73008 73008 73008	51 52 53	3 t 3 t 3 t	JSA CONVENIENCE STORE #300 JSA CONVENIENCE STORE #400 JSA CONVENIENCE STORE #500	10 10 10	2 2 2	BAG BAG BAG
73008 73008 73008 73008	51 52 53 54	3 t 3 t 3 t 3 t	JSA CONVENIENCE STORE #300 JSA CONVENIENCE STORE #400 JSA CONVENIENCE STORE #500 JSA CONVENIENCE STORE #600	10 10 10 10	2 2 2 2	BAG BAG BAG BAG

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.

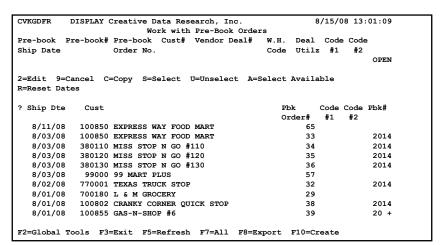
Changing The Ship Date Of All An Order's Items

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.



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.



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.

```
8/15/08 13:08:29
CVKGDFR
         DISPLAY Creative Data Research, Inc.
                         Work with Pre-Book Orders
Pre-book Pre-book# Pre-book Cust# Vendor Deal# W.H. Deal Code Code
                  Order No.
                                                  Code Utilz #1 #2
2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available
R=Reset Dates
                                                     cok Code Code Pbk#
Order# #1 #2
? Ship Dte
            Cust
  8/11/08
           100850 EXPRESS WAY FOOD MART
            100850 EXPRESS WAY FOOD MART
                                                                       2014
  8/03/08
                                                          33
   8/03/08
            380110 MISS STOP N GO #110
   8/03/08
            380120 MISS STOP N GO #120
                                                                        2014
  8/03/08
           380130 MISS STOP N GO #130
                                                                       2014
   8/03/08
             99000 99 MART PLUS
           770001 TEXAS TRUCK STOP
 8/01/08
            700180 L & M GROCERY
            100802 CRANKY CORNER QUICK STOP
                                                                       2014
  8/01/08
   8/01/08
           100855 GAS-N-SHOP #6
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#-->
                         U/M Pending 4 Exported
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message
                  ine Item Qty U/M Price
4 113200 10 2 CTN 29.46
          Ord / Line Item
                                                            294.60
    Ship Date 80108 MARLBORO 100 BOX
29 2 802680 2 2 EA
                                             16.88
                              2 2 EA
                                                             33.76
    Ship Date 80108 BIC LIGHTER COMFORT LITE
    29 1 439336 10 2 BOX
Ship Date 80408 HERSHEY PLAIN GIANT BAR
29 3 631127 10 2 BAG
                                                              384.00
                                               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>.

```
CVVKEIR 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#
                                       Limit Order#-->
ine Item Qty U/M Price
4 113200 10 2 CTN 29.46
       Ord / Line Item
                                         Extension
   Ship Date 80108 MARLBORO 100 BOX 29 2 802680 2 2 EA
                                  16.88
                                              33.76
   Ship Date 80108 BIC LIGHTER COMFORT LITE
   384.00
                                               154.50
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.

```
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 Co
                 Order No.
                                                  Code Utilz #1
Ship Date
2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available
R=Reset Dates
                                                     Pbk Code Code Pbk#
Order# #1 #2
? Ship Dte
  8/18/08 700180 L & M GROCERY
                                                          29
           100850 EXPRESS WAY FOOD MART
   8/11/08
   8/03/08
            100850 EXPRESS WAY FOOD MART
                                                                        2014
   8/03/08 380110 MISS STOP N GO #110
                                                                         2014
           380120 MISS STOP N GO #120
  8/03/08
                                                                        2014
   8/03/08 380130 MISS STOP N GO #130
           99000 99 MART PLUS
770001 TEXAS TRUCK STOP
   8/03/08
                                                                        2014
   8/02/08
            100802 CRANKY CORNER QUICK STOP
   8/01/08 100855 GAS-N-SHOP #6
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>.

C1	/KGDFR D	DISPLAY Creative Data Research, Inc.	8/15/08 1	3:25:25
		Work with Pre-Book Orde	ers	
Pı	re-book Pr	re-book# Pre-book Cust# Vendor Deal#	W.H. Deal Code Co	ode
Sì	nip Date	Order No.	Code Utilz #1 #	2
	=			OPEN
2=	-Edit 9=Ca	ancel C=Copy S=Select U=Unselect A=	=Select Available	
R=	Reset Date	es		
?	Ship Dte	Cust	Pbk Code Cod	le Pbk#
	•		Order# #1 #2	2
R	8/18/08	700180 L & M GROCERY	29	
		100850 EXPRESS WAY FOOD MART	65	
		100850 EXPRESS WAY FOOD MART	33	2014
		380110 MISS STOP N GO #110	34	2014
			35	2014
			36	2014
			57	
			32	2014
			38	2014
	8/01/08	-	39	20 +

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	
Pre-book Pre-book# Pre-book Cust# Vendor De	al# W.H. Deal Code Code
Ship Date Order No.	Code Utilz #1 #2
• • • • • • • • • • • • • • • • • • • •	OPEN
2=Edit 9=Cancel C=Copy S=Select U=Unselect R=Reset Dates	A=Select Available
? 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 : 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 <============
                       1. Work With Pre-book Orders
THE ||
                       2. Work with Pre-book Items
DAC
                     3. Purge Pre-book Orders
SYSTEM ||
1111111111
                      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
                       MENU CALLS
                        20. Billing Files Maint. 21. Billing Reports
19. Billing
                     23. Dac Main Menu
                                                90. Sign Off
22. Remote Orders
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
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 User Code #1 . . . User Code #2 Include Exported? N
                                 User Code #2
                                                   Include Exported? N (Y/N)
S=Select All U=Unselect All A=Select Available 5=Details
                                              Total Total Total On
Demanded Selected Avail Order
? Item Description
  113200 MARLBORO 100 BOX
                                                  10.00 .00 201
                                                               .00
  439336 HERSHEY PLAIN GIANT BAR
                                                  80.00
  561158 KEEBLER CHIPS DELUXE 20Z
                                                               .00 1242
                                                   4.00
                                                             .00 1242
.00 5
.00 3886
.00 1710
  631127 KEEBLER FUDGE STRIPE COOKIES 11.50
                                                 80.00
  770130 BLACKJACK FULL FLAVOR 160Z
                                                  56.00
16.00
                                                               .00 1710
  802680 BIC LIGHTER COMFORT LITE
  902026 BIC RED CHRYSTAL
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 Limit to User Code #1 . . .
                                       To
                                 User Code #2
                                                   Include Exported? N (Y/N)
S=Select All U=Unselect All A=Select Available 5=Details
                                              Total Total Total
Demanded Selected Avail
? Item Description
                                                                             Order
                                                 16.00 .00 1710
14.00 .00 657
10.00 .00 0
4.00 .00 766
  802680 BIC LIGHTER COMFORT LITE
  902026 BIC RED CHRYSTAL
                                                                                 0
  902400 BIC CLASSIC MED BLACK 2PK
  930030 CAPTAIN BLACK GOLD POUCH
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 DI	ISPLAY Cr		Data Resea			8/1	8/08 1	14:57:55
Item 802680 BIC LIGHTER COMFORT LITE						Deal Type:		
Position to S Limit to Cust Limit to User	tomer .		Limit to	Pre-bool	c#			
Type options, 2=Edit Line ? Ship Or	S=Select	/Unsel	-	port		Qt	y U/N	и
81808	29	2 L	M GROCERY	r .			2 2	EA
82508	50	2 US	CONVENIE	NCE STORE	#200		2 2	EA
82508	51	2 US	CONVENIE	NCE STORE	#300		2 2	EA
82508	52	2 US	CONVENIE	NCE STORE	#400		2 2	EA
82508	53	2 US	CONVENIE	NCE STORE	#500		2 2	EA
82508	54	2 US	A CONVENIER	NCE STORE	#600	:	2 2	EA
91208	60	2 MI	SS STOP N C	O #130				EA
93008	59	2 MI	SS STOP N C	GO #120		:	2 2	EA
F2=Global Too	ols F3=E	xit F	l=Search I	5=Reload	F6=Access	Date F	8=Ехро	ort

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** redisplays 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
      81808
                             2 L & M GROCERY
                    29 2 L & M GROCERY
50 2 USA CONVENIENCE STORE #200
51 2 USA CONVENIENCE STORE #300
52 2 USA CONVENIENCE STORE #400
53 2 USA CONVENIENCE STORE #500
54 2 USA CONVENIENCE STORE #600
60 2 MISS STOP N GO #130
59 2 MISS STOP N GO #120
       82508
      82508
      82508
       82508
                                                                                            2 EA
       91208
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
              2 700180 L & M GROCERY
Type changes, press Enter.
               802680 BIC LIGHTER COMFORT LITE
             1 2
                     MAIN WAREHOUSE
Unit Price . :
                   16.88
Extension . :
                     33.76
              81808
Deal Utilization T (S=Standard, T=Show, X=None)
F2=Unlock Price F3=Exit F4=Prompt F7=Update & Exit
```

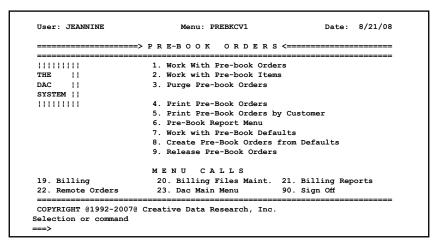
- 6. To change the order quantity, enter the new quantity for the **Qty** field, and press <Enter>. The calculation of the **Unit Price** and **Extension** fields are updated accordingly.
- 7. To change the unit of measure ordered, enter 1, 2, 3 or 4 for the **U/M** field, and press <Enter>. The calculation 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.

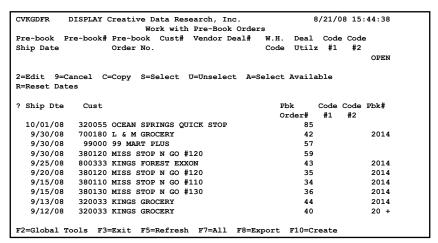
Overriding A Pending Item's Price

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.



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. 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.

3. 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.

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** redisplays 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.
- 4. 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
                1 700180 L & M GROCERY
     99
Type changes, press Enter.
Item Number . 561158
Warehouse Code 1
                561158 KEEBLER CHIPS DELUXE 20Z
                      MAIN WAREHOUSE
Unit Price . :
                     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
                  Customer
           Line
Order Number Number
                1 700180 L & M GROCERY
Type changes, press Enter.
Item Number . 561158 KEEBLER CHIPS DELUXE 20Z
Warehouse Code 1 MAIN WAREHOUSE Otv .... 1
U/M . . . . . 2 CTN
Unit Price . :
Ship Date . . 82108
Deal Utilization S (S=Standard, T=Show, X=None)
F2=Unlock Price F3=Exit F4=Prompt F7=Update & Exit
```

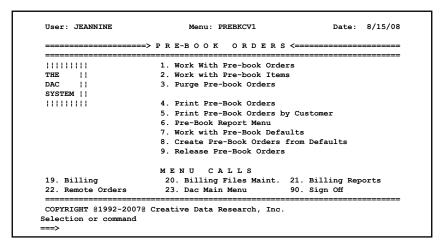
8. Press <F7> (Update & Exit), and press <Enter> to confirm. The Edit Pre-book Order: DTE screen appears.

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.

9. 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.



- 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
OUALIFY:
Pre-book Number . . . .
Ship Date Range: From .
Warehouse . . . . . .
Vendor . . . . . . . . .
Primary must be in range? (Y/N)
Deal Utilization . . . .
                                     (S=Standard, T=Show, X=None, Blank=Anv)
Require pending order? .
                                       (P=Primary Route, A=Any, Blank=Not Req.)
CHANGE:
CHANGE:
Action . . . . . . . . . . . . . . . (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 necesary, 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 #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? 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>.

```
8/15/08 15:08:17
CVMHPVR
                   Creative Data Research, Inc.
           ENTER
                              Pre-book Global Tools
QUALIFY:
Pre-book Number .
Ship Date Range: From .
                          902400 BIC CLASSIC MED BLACK 2PK
Item . . . . . . . . . . . . .
Warehouse . . . . . .
Vendor . . . . . . . . .
Deal # . . . . . . . .
From .
                                  to
                                              Primary must be in range? (Y/N)
CODE #1
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.)
CHANGE:
F15=Copy Set of Prebook Orders
```

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

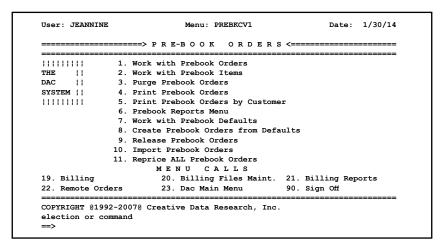
```
CVL2DFR
                                                                    8/15/08 15:11:42
           DISPLAY Creative Data Research, Inc.
                             Work with Pre-book Ite
Position to Item . .
Limit to Warehouse . . . .
                                         Limit to Pre-book#
Limit to Vendor . . . . .
                         . . .
. . .
ion . (S=Standard, T=Show, X=None, Blank=Any)
Limit to Deal Number
Limit to Deal Utilization .
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 On
Demanded Selected Avail Order
                                                 10.00
  113200 MARLBORO 100 BOX
  439336 HERSHEY PLAIN GIANT BAR
                                                   80.00
                                                                 .00
                                                                          32
                                                             .00
.00 3886
.00 1710
.00 657
  561158 KEEBLER CHIPS DELUXE 20Z
                                                     4.00
                                                                 .00 1242
  631127 KEEBLER FUDGE STRIPE COOKIES 11.50 80.00 770130 BLACKJACK FULL FLAVOR 160Z 52.00
  770130 BLACKJACK FULL FLAVOR 160Z
                                                                                     0
                                                   16.00
  802680 BIC LIGHTER COMFORT LITE
                                                                                    0
  902026 BIC RED CHRYSTAL
                                                   14.00
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.

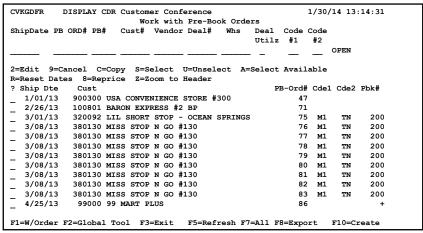
9. Repeat the previous steps to continue replacing items, and press <F3> (Exit) when data entry is complete. The Pre-book Orders screen appears.

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.



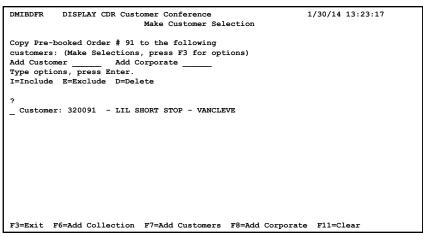
1. Select option 1 (Work With Pre-book Orders) from the Pre-book Orders screen. The Work With Pre-book Orders screen appears with a list of previously entered pre-book orders in reverse order by ship date.



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 Prompt for Pre-Book Co	1/30/14 13:19:59 PY										
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.



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
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 G0
_ 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

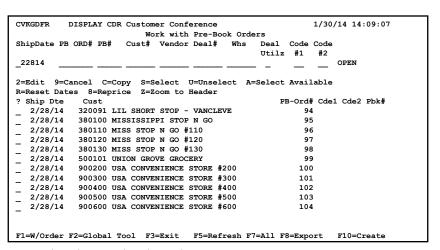
?

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.

- 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.



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.

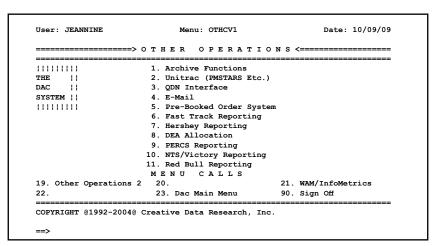
Step 3: Use the Create Pre-book Orders From Defaults application (option 8 of the Pre-book Orders screen) to add duplicate orders for multiple customers. Refer to Adding Pre-book Orders With Pre-book Defaults below for additional information.

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.

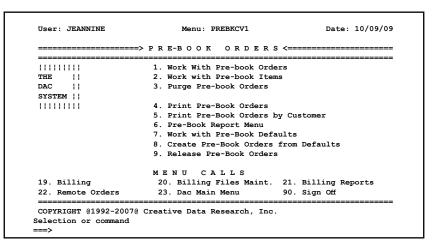
Adding Pre-book Defaults

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.



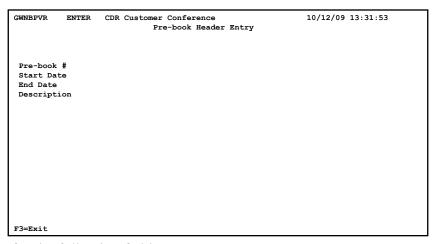
2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.



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.

```
10/12/09 13:31:22
           DISPLAY CDR Customer Conference
                           Work with Prebook Master
      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
  Start 6/01/09 End 12/31/09 Deal#
                                        29
         F4=Search
                     F10=Create F15=Prebooked Items F24=Links
```

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



- 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
Pre-book Header Entry

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

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

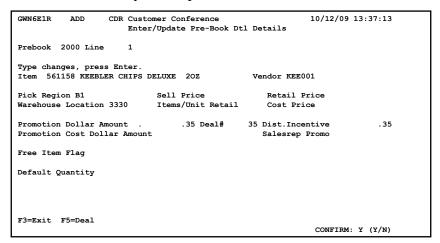
Type options, press Enter.
2=Edit D=Delete C=Copy

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.

```
10/12/09 13:34:42
GWN6E1R ADD
                  CDR Customer Conference
                      Enter/Update Pre-Book Dtl Details
Prebook 2000 Line
Type changes, press Enter.
Item 561158 KEEBLER CHIPS DELUXE 20Z
                                               Vendor KEE001
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 designated 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.



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

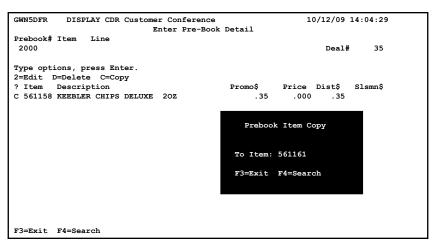
Enter Pre-Book Detail

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 \leq Enter \geq to use the Pre-book Item Copy screen to add an item.

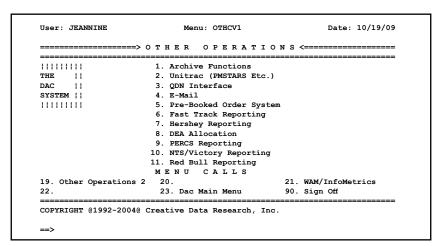


18. Repeat the previous steps to continue adding items to the pre-book default, and press <F3> (Exit) when data entry is complete.

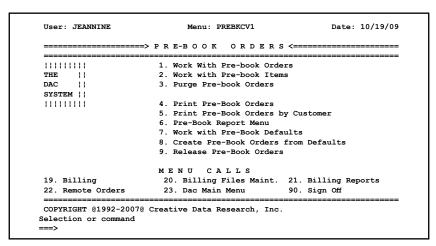
Adding Pre-book Orders With Pre-book Defaults

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.



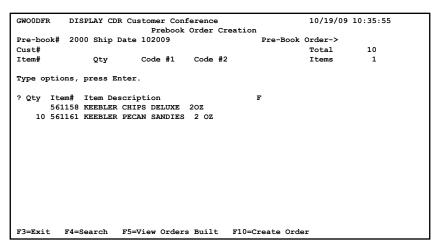
2. Select option 5 (Pre-booked Order System) from the Other Operations screen. The Pre-book Orders screen appears.



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

GWO0DFR	DISPLAY CDR Cu				e Creation	10/19/09	10:35:1
Pre-book#	Ship Date					Pre-Book Order->	
Cust#						Total	0
Item#	Qty	Code	#1	Code	#2	Items	0
Type optio	ns, 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>.



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

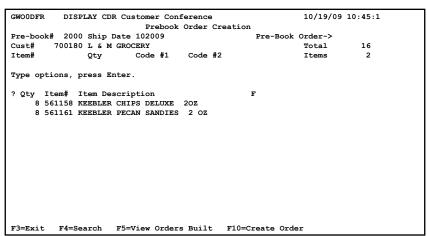
6. Enter a customer number for the **Cust#** (6,n) field and press <Enter>, or press <F4> to select a number from the Select Customer Master screen.

```
10/19/09 10:44:36
          DISPLAY CDR Customer Conference
                          Prebook Order Creation
Pre-book# 2000 Ship Date 102009
                                                 Pre-Book Order->
      700180 L & M GROCERY
                                                           Total
                        Code #1 Code #2
               Qty
                                                           Items
Type options, press Enter.
? Qty Item# Item Description
       561158 KEEBLER CHIPS DELUXE 20Z
   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.



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.

GWO0DFR	DISPLAY CDR (Customer Con:	ference		10/19/09	10:45:35
		Prebook	Order Cre	ation		
Pre-book#	2000 Ship Dat	e 102009		Pre-Book	Order->	22
Cust#					Total	16
Item#	Qty	Code #1	Code #2		Items	2
Type optio	ons, press Ente	er.				
? Qty Ite	m# Item Desci	ription		F		
8 561	158 KEEBLER CH	IIPS DELUXE	20Z			
8 561	161 KEEBLER PE	CAN SANDIES	2 OZ			
F3=Exit	F4=Search F	=View Order	s Built	F10=Create Orde	er	

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 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
                                                           Date: 10/19/09
                             Menu: OTHCV1
               ====> O T H E R O P E R A T I O N S <====
111111111
                       1. Archive Functions
                       2. Unitrac (PMSTARS Etc.)
                       3. QDN Interface
SYSTEM | |
                       4. E-Mail
                       5. Pre-Booked Order System
111111111
                       6. Fast Track Reporting
                       7. Hershey Reporting
                       8. DEA Allocation
                       9. PERCS Reporting
                      10. NTS/Victory Reporting
                      11. Red Bull Reporting
                       MENU CALLS
19. Other Operations 2 20.
                                                  21. WAM/InfoMetrics
                        23. Dac Main Menu
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: 10/19/0
               =====> P R E-B O O K O R D E R S <===
                        1. Work With Pre-book Orders
111111111
THE !!
                       2. Work with Pre-book Items
                       3. Purge Pre-book Orders
SYSTEM !!
                       4. Print Pre-Book Orders
111111111
                        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
                       MENU CALLS
                        20. Billing Files Maint. 21. Billing Reports
19. Billing
                                                  90. Sign Off
22. Remote Orders
                        23. Dac Main Menu
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
Selection or command
```

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

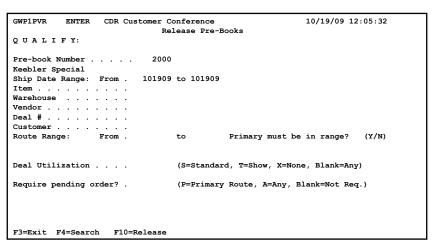
GWP1PVR ENTER CDR Customer C	onference 10/19/09 11:46:26
Re	lease Pre-Books
QUALIFY:	
Pre-book Number	
Ship Date Range: From .	to
Item	
Warehouse	
Vendor	
Deal #	
Customer	
Route Range: From .	to Primary must be in range? (Y/N)
Notice Name:	illimaty must be in range: (1/1/
Deal Utilization	(S=Standard, T=Show, X=None, Blank=Any)
Require pending order? .	(P=Primary Route, A=Any, Blank=Not Req.)
Require pending order: .	(r-riimary noute, n-miy, brank-Not keq.)
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*).



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.

KRDFR I	ISPLAY	CDR Customer			10/1	19/09 12:15:19
osition to			Prompt for E	xport		
Position to						
					U=U1	nselect
Customer /		-				
		Item Qty		n		Date
		/ / 2 Lines /				
19	1	561158 8	KEEBLER CH	IPS DELUXE	20Z	2009-10-19
19	2	561161 8	KEEBLER PE	CAN SANDIES	2 OZ	2009-10-19
BOB'S SHEI	L / 2	Lines / 100				
20	1	561158 10	KEEBLER CH	IPS DELUXE	20Z	2009-10-19
20	2	561161 10	KEEBLER PE	CAN SANDIES	2 OZ	2009-10-19
EXPRESS WA	Y FOOD	MART / 1 Lin	es / 300			
21	1	561161 10	KEEBLER PE	CAN SANDIES	2 OZ	2009-10-19
2=Glb Tools	F3=Ex	it F4=Search	F5=Refresh F	6=Print F7=	Options F1	D=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** redisplays 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** # redisplays 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

rder #	Customer		Ship Dat	e Deal					
Line	# Item		Qty U	nit Price	Unit Cost	Ship Date	U/M	Status	
19	100002 DIANNE'S GROCERY		10/19/09	35					
	1 561158 KEEBLER CHIPS DELUXE	20Z	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	20Z	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	

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.

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.

	Α	В	С	D	Е	F	G	Н
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 doumentation 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 <=========
111111111
             1. Work with Prebook Orders
7. Work with Prebook Defaults
             8. Create Prebook Orders from Defaults
             9. Release Prebook Orders
            10. Import Prebook Orders
            11. Reprice ALL Prebook Orders
                  MENU CALLS
                    20. Billing Files Maint. 21. Billing Reports
19. Billing
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.

```
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
      49 4/23/21 HARLAND
      45 4/14/21 HARLAND
43 4/13/21 HARLAND
                             Format A
                             Format A
      39 4/09/21 HARLAND
                             Format A
      28 10/22/18 CODY
F3 F10=Ten Item Import F15=Pre-book Refusal Customers F23=Import Version2
```

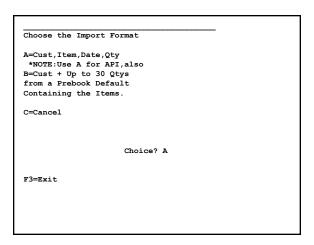
4. Press <F23> (Import Version2). The Select File from Folder screen appears with the list of documents in the CV1COM folder.

```
DPI8SRR
           SELECT CDR Customer Conference
                                                               7/02/21 12:42:50
                            Select File from Folder
CV1COM
                                       (Case-Sensitive)
Choose a file with X and press Enter.
  ABLCOL1.PRN
   AGETB.TXT
  ALTRIAHW.CSV
  ALTRIA1.CSV
  ARDETAIL.CSV
   AVGDAYS . PDF
  COMMON.DAT
   CO011819.CSV
  CO012119.CSV
   CO122618.CSV
   CO122718.CSV
  CO122818.CSV
```

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

DPI8SRR SELECT CDR Customer Confere	• • • • • • • • • • • • • • • • • • • •
Select File CV1COM Find -> FORMA	from Folder
	(Case-Sensitive)
Choose a file with X and press Enter.	
X FORMATA1.CSV FORMATB1.CSV GWTEST.CSV GWZ.CSV HEADINGS.PRN HIBINVH1.PRN HIFUPFR\$.HTM HIFUPFR\$.PDF HMINVB8.PRN HOLINV1.PRN INV_INFO.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.



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.

Enter Prebook Creation Options Type choices, press Enter. Ship Date	DPSOPVR ENTER CDR Custon	mer Conference	7/02/21 13:12:31
REQUIRED REQUIRED	Ente	r Prebook Creation Opti	ons
REQUIRED REQUIRED			
Marn Warehouse Code	Type choices, press Enter.		
Marn Warehouse Code			
Marn Warehouse Code	Ship Date	REQUIRED	
Deal Utilization S (S=Standard, T=Trade Show, X=Normal) Deal Number		1 MAIN WAREHOUSE	
Deal Number Recommended for Tracking User Code #1 Recommended for Tracking Special Message 1 Special Message 2 Special Message 3	Controlling Prebook#	Required by "B"	Method
User Code #1 Recommended for Tracking User Code #2 Recommended for Tracking Special Message 1	Deal Utilization	S (S=Standard, T=Trade	Show, X=Normal)
User Code #2 Recommended for Tracking Special Message 1			
Special Message 1 Special Message 2			-
Special Message 2	User Code #2	Recommended for Tra	cking
Special Message 2	Special Message 1		
Special Magazage 2	-		
	-		
F3=Exit F4=Search	E2-Euit E4-Coomah		

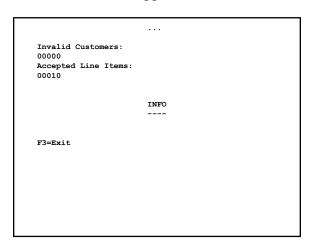
- 8. Enter a date for the **Ship Date** (6,n) field to designate the default ship date for each pre-book order created during the import process.
- 9. If necessary, enter a different code for the **Warehouse Code** (6,a) field. With the cursor positioned in the **Warehouse Code** field, users may press <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 Custo	omer Conference	7/02/21 15:52:29
		7/02/21 15:52:29
Ente	r Prebook Creation Options	
Type choices, press Enter.		
Ship Date	080121 REOUIRED	
Warehouse Code	• • • • • • • • • • • • • • • • • • • •	
Controlling Prebook#		
Deal Utilization	S (S=Standard, T=Trade Show,	X=Normal)
Deal Number		
User Code #1	JP Recommended for Tracking	
User Code #2		
0002 0000 #2	or necommended for fracting	
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)

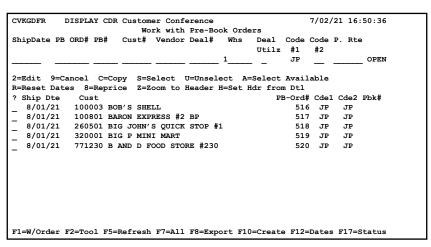
Refer to Adding Pre-book Orders for information about the fields above.

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.



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

- 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.



As illustratrated 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 SHC S=Select/Unselect D=Delete 2=Edit Line Properties M=Message
                                                      0 SHOW PENDING
         Ord / Line Item Qty U/M Price
518 2 100003 24 2 CTN 40.20
        518
                                                         964.80
   Ship Date _81221 MARLBORO BLACK BOX 100
   964.80
                                                         482.40
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr
```

17. 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.

	Α	В	С	D	Е	F	G	Н	1	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.

```
DISPLAY CDR Customer Conference
GWN5DFR
                                                                6/30/21 11:48:13
                             Enter Pre-Book Detail
Prebook# Item
                       Vendor
                Line
2021
                                                                   Deal#
                                                                             152
Type options, press Enter
2=Edit D=Delete C=Copy
                                              Promo$
? Item
       Description
                                                          Price Dist$
                                                                          Slsmn$
 100005 MARLBORO BLEND BOX KING #27
                                                    . 50
                                                            . 000
 100001 MARLBORO BLEND BOX K/S SOFTPACK
                                                            . 000
                                                    . 50
 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
                                                    . 50
  100002 MARLBORO BLACK BOX K/S SOFTPACK
                                                            .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 <========
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
                 MENU CALLS
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
45 4/14/21 HARLAND
                             Format A
                             Format A
      43 4/13/21 HARLAND
                             Format A
      39 4/09/21 HARLAND
                             Format A
      28 10/22/18 CODY
   F10=Ten Item Import F15=Pre-book Refusal Customers F23=Import Version2
```

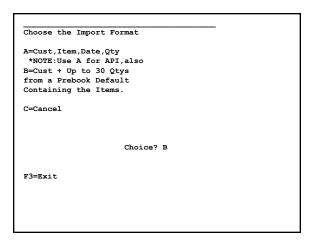
4. Press <F23> (Import Version2). The Select File from Folder screen appears with the list of documents in the CV1COM folder.

```
7/05/21 11:06:34
DPI8SRR
           SELECT CDR Customer Conference
                             Select File from Folder
CV1COM
Find ->
                                       _ (Case-Sensitive)
Choose a file with X and press Enter.
   ABLCOL1.PRN
  AGETB.TXT
ALTRIAHW.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.

```
7/05/21 11:06:34
DPI8SRR
           SELECT CDR Customer Conference
                            Select File from Folder
                                     _ (Case-Sensitive)
Choose a file with X and press Enter.
   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.



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 Opt	cions
Type choices, press Enter.	
Type Choices, pless Enter.	
Ship Date REQUIRED	
Warehouse Code 1 MAIN WAREHOUSE	3
Controlling Prebook# Required by "I	3" Method
Deal Utilization S (S=Standard, T=Trac	
Deal Number	,,
User Code #1 Recommended for Tr	
User Code #2 Recommended for Ti	cacking
Special Message 1	
Special Message 2	
Consist Manager 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.

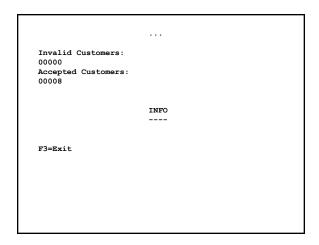
Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document for information about creating invoice messages that are printed on every customer's invoices.

DPSOPVR ENTER CDR Custo	omer Conference 7/05/21 11:16:59	
Ente	er Prebook Creation Options	
l		
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		
l		
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.

	omer Conference er Prebook Creation Options	7/05/21 11:16:59
Type choices, press Enter.		
Ship Date	MAIN WAREHOUSE 2021 Format B Import S (S=Standard, T=Trade Show152 PREBOOKING - #02021 JF Recommended for Tracking	, X=Normal)
Special Message 1 Special Message 2 Special Message 3	PREBOOKING - #02021	
F3=Exit F4=Search		CONFIRM: Y (Y/N)

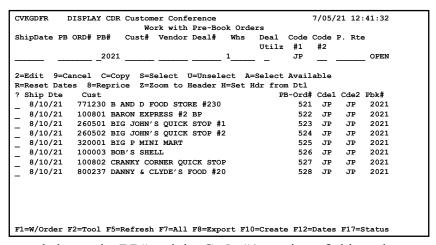
16. Press <Enter> when prompted to confirm. The INFO screen appears with the total number of customer pre-book orders created.



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#
  Batch# Line# Cust#
              1 771230 B AND D FOOD STORE #230
              2 100801 BARON EXPRESS #2 BP
              3 260501 BIG JOHN'S OUICK STOP #1
        96
              4 260502 BIG JOHN'S QUICK STOP #2
              5 320001 BIG P MINI MART
              6 100003 BOB'S SHELL
              7 100802 CRANKY CORNER QUICK STOP
               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.



As illustratrated 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..

CVV:	LDFR	DIS	SPLAY C	DR Custome	r Confe				,	7/05/2	21 12:45:3
Cus	tomer	7712	30 B A	ND D FOOD			. 014	-			
				>			·	Lir	mit Orde	r#>	521
				U/M						CHOM	DENDING
				D=Delete							PENDING
-	02000,	011001		2 202000				010100	11 11000	-90	
		Ord	/ Line	Item (ty U/	м	Pric	е	Extens	ion	
	M	521	9	100005	18 2	CTN		58.65	1	055.70)
_	Ship	Date	_81021	MARLBORO	BLEND	BOX K	NG	#27			
_	M	521	_ 8	100001	16 2	CTN		48.15		770.40)
	Ship	Date	_81021	MARLBORO	BLEND	BOX K	's so	FTPACK			
_	M	521	7	100027	14 2	CTN		58.65		821.10)
	Ship	Date	_81021	MARLBORO	BLACK	SPEC E	BLEND	BOX 100	0		
_				100024						703.80)
	-		_	MARLBORO							
_				100004						546.90)
				MARLBORO							
_				100058						875.04	1
	Ship	Date	_81021	MARLBORO	BLACK	BOX 10	00 B2	G\$2			
	a =					_			. =10		
F 2=	EID TO	OOLS F	3=Exit	F5=Refres	n r6=Ac	cess I	·/=A1	T F.R=EX	port F10	=наr	

Enter the date in the **Ship Date** (6,n) field for the necessary items.

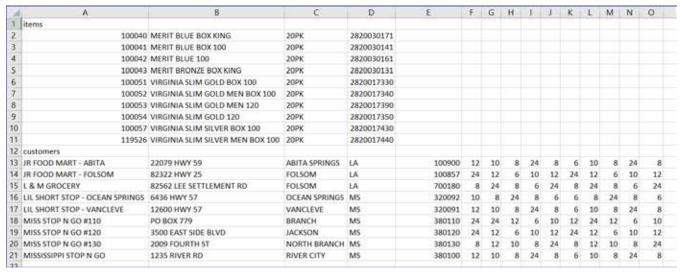
				DR Custome	Edit	Pre-Boo			7/05/2	21 12:45:35
				ND D FOOD >			·>	Lin	nit Order#>	521
 Ite	m		 Qty	U/M	Pe	 nding	9	Exporte	ed 0 SHOW M=Message	
		Ord	/ Line	Ttem (1+17	п/м	Pric		Extension	
	м								1055.70)
_				MARLBORG						
_	м	521	_ 8	100001	16	2 CTN	ī	48.15	770.40)
	Ship	Date	_81221	MARLBORG	BLEN	D BOX F	c/s sc	FTPACK		
_	M	521	7	100027	14	2 CTN	1	58.65	821.10)
	Ship	Date	_81021	MARLBORG	BLAC	K SPEC	BLEND	BOX 100)	
_									703.80)
				MARLBORG						
									546.90)
_	Ship			MARLBORG						
_		E 2 1	4	100058	16	2 CTN	ī	54.69	875.04	1
_				MARLBORG						+

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 quantitites in columns F through O as necessary.



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.

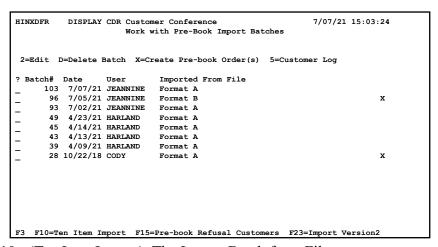
While only valid item and customer numbers are required to successfully import a CSV file in the Ten Item Import Format, entering the additional item and customer data will make reviewing the items and customers easier after the import process is complete.

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
        111111111
           1. Work with Prebook Orders
2. Work with Prebook Items
3. Purge Prebook Orders
4. Print Prebook Orders
5. Print Prebook Orders by Customer
6. Prebook Preports Menu
                 1. Work with Prebook Orders
THE ||
DAC ||
 SYSTEM | |
111111111
                 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
                       MENU CALLS
                           20. Billing Files Maint. 21. Billing Reports
19. Billing
                                                       90. Sign Off
 22. Remote Orders
                           23. Dac Main Menu
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.



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 Import Batch f		7/07/21	15:08:57
Enter	full pat	th & filename of file to im	port. Ex.	/tmp/forceout.dat	
/qdls	/cv1com/E	FORMATB1.csv			
				· · · · · · · · · · · · · · · · · · ·	
F3=Exit					

5. Enter the new CSV file's name for the **Enter full path & filename of file to import** field.

HIOOFVR ENTER CDR Customer Conference 7/07/2 Import Batch from File	1 15:08:57
Enter full path & filename of file to import. Ex. /tmp/forceout.da	t
/qdls/cvlcom/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 Act	tual Item Imported Item		
D=Delete ?=Select Item			
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 Cus	stomers F10=Add Item		

Refer to Editing Imported Item Data for additional information about the Work With PBI Items screen.

7. Press <F7> (Jump to Customers) to view the imported customer data. The Work With Pre-book Import: Customer screen appears.

```
7/08/21 10:38:21
               DISPLAY CDR Customer Conference
                               Work with Pre-Book Import: Customer
Line Number
                           Actual Customer ____ Imported Customer
D=Delete ?=Select X=Alt.Select
                                               NOTE: Use F8 Filter By Status

        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
                                                                                         8
       Act 100857 JR FOOD MART - FOLSOM, 82322 HWY 25, FOLSOM, LA Imp 100857 JR FOOD MART - FOLSOM, 82322 HWY 25, FOLSOM, LA
               __24 __
                          _12 _
                                      _6 __10 __12 __24 _
                                                                                                   10
       Act 700180 L & M GROCERY, 82562 LEE SETTLEMENT RD, FOLSOM, LA
       Imp 700180 L & M GROCERY, 82562 LEE SETTLEMENT RD, FOLSOM, LA
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.

8. Press <F3> to exit when data editing is complete. The Work With Pre-book Import Batches screen appears.

```
7/08/21 11:27:51
HINXDFR
           DISPLAY CDR Customer Conference
                        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 /qdls/cvlcom/10ITEM01.csv Customers=00009
103 7/07/21 JEANNINE Format A
       96 7/05/21 JEANNINE
                                                                                 х
       93 7/02/21 JEANNINE
49 4/23/21 HARLAND
                                Format A
                                Format A
       45 4/14/21 HARLAND
                                Format A
       43 4/13/21 HARLAND
       39 4/09/21 HARTAND
                                Format A
       28 10/22/18 CODY
                               Format A
F3 F10=Ten Item Import F15=Pre-book Refusal Customers F23=Import Version2
```

9. Enter *X* (Create Pre-book Orders) in the selection column next to the new pre-book import batch.

```
HINXDFR
                                                             7/08/21 11:27:51
          DISPLAY CDR Customer Conference
                      Work with Pre-Book Import Batches
2=Edit D=Delete Batch X=Create Pre-book Order(s) 5=Customer Log
? Batch# Date
                  Ilser
                             Imported From File
     105 7/07/21 JEANNINE
                             /qdls/cvlcom/10ITEM01.csv Customers=00009
     103 7/07/21 JEANNINE
                             Format A
          7/05/21 JEANNINE
                             Format B
      93 7/02/21 JEANNINE
                             Format A
         4/23/21 HARLAND
      49
                             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
   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	1
Deal Utilization S (S=Standard, T=Trade Show,	
	n-Normar)
Deal Number	
User Code #1 Recommended for Tracking	
User Code #2 Recommended for Tracking	
Special Message 1	
Special Message 2	_
Consist Manager 2	_
Special Message 3	_
F3=Exit F4=Search	
10 2110 11 0001011	

- 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 Enter Prebook Creation Options	7/08/21 11:46:52
Type choices, press Enter.	
Ship Date	
Special Message 1 Special Message 2 Special Message 3	

- 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# Cde1 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 illustratrated 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 E Customer 100900 JR FOOD MART -						Pre-Boo			7/08/21 12:40:47		
							>	Lim	it Order#>	564	
Ite	n	ç	ty						d 0 SHOW M=Message	PENDING	
		Ord	/ Line	Item (Qty	U/M	Price		Extension		
_				119526						2	
	Ship		_	VIRGINI							
_									894.96	5	
	Ship			VIRGINI							
_									298.32	2	
	Ship			VIRGINI							
_	~1 ·								372.90)	
	Snip		_	VIRGINI					223.74		
_	ar :			VIRGINI					223.74	•	
	Siiip		_						298.32		
		204	5	TOOOT		Z CIN	3	1.29	298.32	<u>-</u>	

Enter the date in the **Ship Date** (6,n) field for the necessary items.

DFR	DIS	SPLAY C	DR Custome	r Con	ference			7/08/	21 12:40:4
				Edit 1	Pre-Boo	k Oro	ler		
omer	1009	900 JR	FOOD MART	- ABI	ΓA				
tion	Ship	Date	>	Limit	Item	>	L	imit Order#>	564
									PENDING
lect	/Unsel	Lect	D=Delete	2=Ed:	it Line	Prop	erties	M=Message	
	Ord	/ Line	Item C	tv 1	л/м	Pric	e.	Extension	
									32
Ship									
•		_							96
Ship									
•								298.3	32
Ship	Date	80621	VIRGINIA	SLIM	GOLD 1	20			
_	564	- 7	100053	10	2 CTN		37.29	372.9	0
Ship	Date	80621	VIRGINIA	SLIM	GOLD M	EN 12	20		
-	564	- 6	100052	6	2 CTN		37.29	223.7	14
Ship	Date	80621	VIRGINIA	SLIM	GOLD M	EN BO	X 100		
_	564	- 5	100051	8	2 CTN		37.29	298.3	32
Ship	Date	80621	VIRGINIA	SLIM	GOLD B	ox 10	00		
	Ship Ship Ship	omer 1009 tion Ship lect/Unsel Ord 564 Ship Date	Omer 100900 JR tion Ship Date	Omer 100900 JR FOOD MART tion Ship Date—-> OTM / Line Item Q 564 10 119526 Ship Date 80621 VIRGINIA 564 8 100054 Ship Date 80621 VIRGINIA 564 7 100053 Ship Date 80621 VIRGINIA 564 7 100053 Ship Date 80621 VIRGINIA 564 6 100055 Ship Date 80621 VIRGINIA 564 7 100053 Ship Date 80621 VIRGINIA 564 6 100055 Ship Date 80621 VIRGINIA 564 5 100051	Edit Commer 100900 JR FOOD MART ABT Limit Limit	Edit Pre-Book Edit Pre-Boo	Comer 100900	Edit Pre-Book Order Commer 100900 JR FOOD MART ABITA Limit Item Limit I	Edit Pre-Book Order

Press <F3> (Exit) when data entry is complete.

Editing Imported Item Data

HIN0DFR		9	/16/10 10:20:30	
	Work with PBI Items			
Line Numb	per Actual Item Imported Ite	em		
D=Delete	?=Select X=Alt.Select			
Line	e 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 illustated 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 Conferen	ice 9	/16/10 10:20:30
	Work with	PBI Items	
Line Numb	per Actual Item	Imported Item	
D=Delete	?=Select X=Alt.Select		
Line	Item Description	Pack	UPC
?	1 Actual 131761 BASIC FF 100 BC	OX 20PK	02820016220
Ovr UM	Imported 131761 B&H MENT 100 LT	20PK	2820010520
>>	2 Actual 787878 >>>ITEM NOT FOU	JND<<<	
Ovr UM	Imported 787878 BASIC FF 100 BC	OX 20PK	2820000620
	3 Actual 83 MARLBORO LIGHTS	3 100'S	2820010180
Ovr UM	Imported 83 MARLBORO LIGHT	100 20PK	2820010530
	4 Actual 119526 VIRGINIA SLIM N	MENT 100 BOX 20PK	02820013280
Ovr UM	Imported 119526 VIRGINIA SLIM M	MENT 20PK	2820013280
F3=Exit	F4=Search F7=Customers F10=Ac	dd Item	

2. Press <Enter>. The Select Item screen appears.

HIONSRR SELECT CDR Custome	r Conference			9/1	L6/10 :	10:21:24
	Select It	em				
Item Description		Cat. Sales	Proc	d. Tax	Ve	ndor Sts
		Class	Clas	ss Clas	ss	
						A
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		A
BIC LIGHTER COMFORT LITE		802680	9	850		A
BIC LIGHTER MINI CLASSIC 3PK		802662	9	850		A
BIC RED CHRYSTAL		902026	9	850		A
BLACKJACK FULL FLAVOR 160Z		770130	2	200		200 A
CAMEL FILTER 85 BOX	20PK	100500	1	100	51	100 A
CAPTAIN BLACK GOLD POUCH	6 PK	930030	2	300		200 A
CARLTON MENTHOL	20PK	101300	1	101	51	100 +
F3=Exit F4="Contains" Search	F10=Toggle S	tatus				

3. If a valid item is located in the Select Item screen, select it. The Work With PBI Items screen appears.

HINODFR	DISPLAY	CDR Ct	istomer Co	onference	9	/16/10 12:47:36
			Worl	k with PBI Items		
Line Num	ber	Actua	al Item	Imported Item		
D=Delete	?=Select	X=Alt	t.Select			
					Pack	
Lin	-		Descript:			UPC
>>	1 Actual				20PK	
Ovr UM	Imported	131761	B&H MENT	100 LT	20PK	2820010520
>>	2 Actual	787878	>>>ITEM 1	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
	=4.0 1			T10 3 11 T1		
F3=Exit	r4=Search	r·/=Ci	istomers	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			istomer Co Worl	onference k with PBI Items Imported Item	9	/16/10 13:56:14
	?=Select			Imported Item		
Lin	e I	[tem	Descript	ion	Pack	UPC
>>	1 Actual 1	L08300	B&H MENT	100 LT	20PK	02820010520
Ovr UM	Imported 1	L31761	B&H MENT	100 LT	20PK	2820010520
>>	2 Actual 7	787878	>>>ITEM 1	NOT FOUND<		
Ovr UM	Imported 7	787878	BASIC FF	100 BOX	20PK	2820000620
				LIGHTS 100'S		2820010180
Ovr UM	Imported	83	MARLBORO	LIGHT 100	20PK	2820010530
D	4 Actual 1	110526	VIDCINIA	SLIM MENT 100 BOX	20PK	02820013280
Ovr UM					20PK	2820013280
OVE UM	Imported 1	119526	VIRGINIA	SLIM MENT	ZUPK	2820013280
F3=Exit	F4=Search	F7=Cu	stomers	F10=Add Item		

Press <Enter>.

HINODFR		ann a		onference		/1.6/10.14.06.04
HINODER	DISPLAY	CDR Cu			9	/16/10 14:06:04
				with PBI Items		
Line Num			l Item	Imported Item		
D=Delete	?=Select	X=Alt	.Select			
Lin	e I	Item	Descripti	ion	Pack	UPC
>>	1 Actual 1	L08300	B&H MENT	100 LT	20PK	02820010520
Ovr UM	Imported 1	131761	B&H MENT	100 LT	20PK	2820010520
>>	2 Actual 1	131761	BASIC FF	100 BOX	20PK	02820016220
Ovr UM	Imported 7	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=Cu	stomers	F10=Add Item		

5. To override the standard selling unit, enter the unit of measure for the **Ovr UM** field as illustrated below for line item 1.

HIN0DFR	DISPLAY	CDR C	ustomer Co Worl	onference k with PBI Items	9	9/16/10 14:06:04		
Line Numb	Line Number Actual Item Imported Item							
D=Delete	?=Select	x=Al	t.Select	•				
Line	•	Item	Descript:	ion	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		
	=							
l								
F3=Exit	F4=Search	1 F7=C1	ıstomers	F10=Add Item				

- 6. To add an item to the pre-book import batch, press <F10> (Add Item). The Add Pre-book Batch Item window appears.
- 7. 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.

HIN0DFR	DISPLA	Y CDR C	ustomer Co Worl	onference with PBI Items	9	/16/10 14:11:01
Line Num	ber	Actu	al Item	Imported Item		
D=Delete	?=Selec	t X=Al	t.Select	-		
Lin	е	Item	Descripti	ion	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				
	•					
1						
1						
1						
F3=Exit	F4=Searc	h F7=C1	ustomers	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 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 illustated 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.

```
9/17/10 16:19:25
        DISPLAY Creative Data Research, Inc.
                       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
                   10
     Qty
           10
                          10
                                  10
     Act 380130 MISS STOP N GO #130, 2009 FOURTH ST, NORTH BRANCH, MS
     {\tt Imp~380130~MISS~STOP~N~GO,~3500~EAST~SIDE~BLVD,~JACKSON,~MS}
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 Creat	ive Data Rese	arch	, Inc.		9/	17/10 1	6:06:46
		Select Cu	stome	er Master				
c	ustomer Name		Rep	. Corp#	State	Zip	Phone	Sts
								A
City			Add	r1				
Type opti	ons, press Ente	er.						
X=Select	request N=Cust	omer Notes						
?	Customer Name			Phone	Rep.	Corp#	Cust#	Status
B & D E	OOD STORE		713	610-7701	20	771230	771230	A
BARON E	XPRESS #2 BP		985	727-1141	10	100801	100801	A
BIG JOH	N'S QUICK STOP	#1	985	796-5252	DAVID	265000	260501	A
BIG P M	INI MART		601	868-7050	20	320001	320001	A
BOB'S S	HELL		985	871-5151	10	100003	100003	A
CRANKY	CORNER QUICK ST	OP	985	796-8111	20	100802	100802	A
DANNY 8	CLYDE'S FOOD S	STORE #20			20	800237	800237	A
	S GROCERY		985	892-0058	HARLAN	100002	100002	A
DIANNE'			005	893-0099	20	100850	100850	A
	WAY FOOD MART		985	000				
				892-9919	HARLAN	100855	100855	A

4. If a valid customer is located in the Select Customer Master screen, select it. The Work With Pre-book Import:Customer screen appears.

```
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.
      Item1 Item2 Item3 Item4 Item5 Item6 Item7 Item8 Item9 Item1 131761 787878 83 119526
        Cust Address/City/State
 >> Act 100111 >> Customer Not Found <<
    {\tt 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
    Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
    Qty
                   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.

```
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.
       Item1 Item2 Item3 Item4 Item5 Item6 Item7 Item8 Item9 Item10 131761 787878 83 119526
ITEMS:
         Cust Address/City/State
D >> Act 100111 >> Customer Not Found <<
     {\tt 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
     {\tt Imp} 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
                   4
                           4
     Qty
             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

? 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

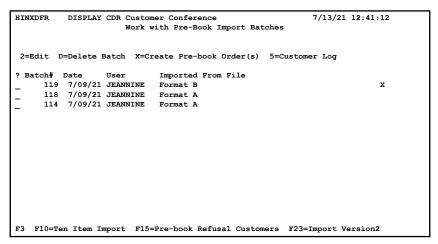
Qty 4 4 4 4

>> Act 100002 DIANNE'S GROCERY, 78352 HWY 437, COVINGTON, LA N

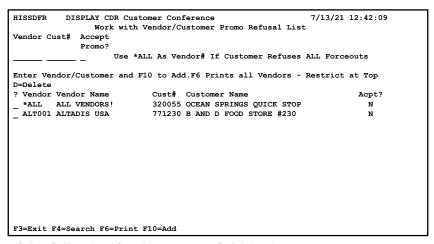
Imp
Qty

F2=Show/Hide F3=Exit F4=Show Item F7=Work with Items F8=Status F10=Add
```

Adding A Vendor/Customer Refusal List

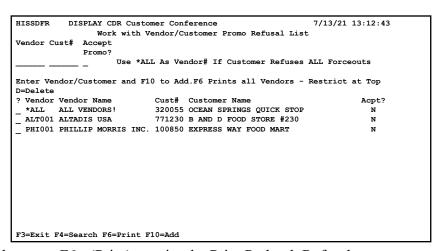


1. Press <F15> (Pre-book Refusal Customers). Work with Vendor/Customer Promo Refusal List screen appears.



- 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.

- 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>.



- 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.

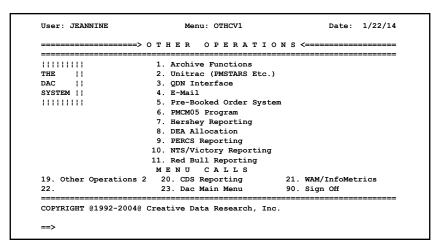
Working With Pre-book Reports

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/Stp
- 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.



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

3. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```
12. Audit Log
                          1. Buyer/Saleman
THE ||
DAC ||
                          2. Customer Collection
                                                               13. User Opts

    Pending for Warehouse
    Buyer by Ship Date
    Route/Date Notification (Driver)

111111111

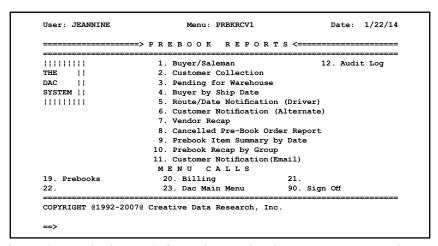
    Customer Notification (Alternate)
    Vendor Recap

                          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
                                                        21.
90. Sign Off
19. Prebooks
                           20. Billing
                           23. Dac Main Menu
22.
==>
```

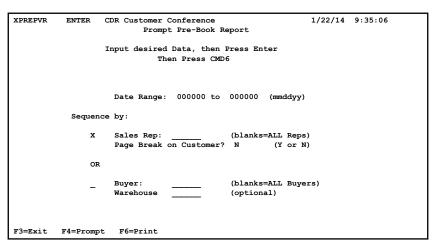
Printing A Print Pre-book Orders Report

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.



2. Select option 1 (Buyer/Salesman) from the Pre-book Reports screen. The Prompt Pre-book Report screen appears.



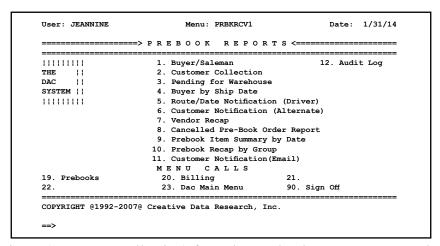
- 3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to shipping dates.
- 4. To limit the orders included to the customers of a specific sales representative, enter an employee code for the **Sales Rep** (6,a) field. Users can 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.

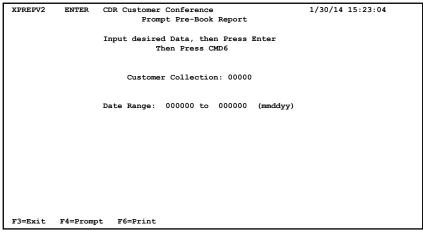
Printing A Print Pre-book Orders By Customer Report

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.



2. Select option 2 (Customer Collection) from the Pre-book Reports screen. The Prompt Pre-book Report screen appears.

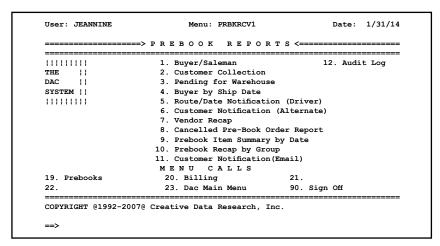


- 3. Enter a customer collection number for the **Customer Collection** (5,n) field, or press <F4> to create and select a collection from the Select Customer Coll screen. Refer to Working With Customer Collections of the Customer File Maintenance document for additional information about creating a collection.
- 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.



2. Select option 3 (Pending for Warehouse) from the Pre-book Reports screen. The Prompt Pre-book Pending Report screen appears.

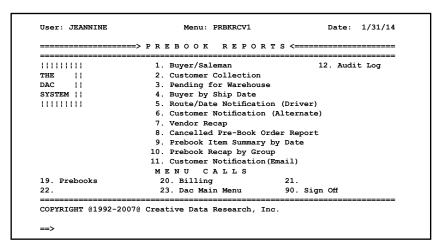
XPREPVP	ENTER CDR Customer Conference 1/31/14 11:57:56
	Prompt Pre-Book PENDING Report
	Input desired Data, then Press Enter
	Then Press CMD6
	Date Range: 000000 to 000000 (mmddyy)
	Zace manage. cooled co cooled (manage),
	Select:
	belect.
	PreBook Number: 0000000 (blanks=ALL PreBooks)
	Trebesia number. Coccost (Erunic IIII Trebesia)
	Vendor Number: (blanks=ALL Vendors)
	Vendor Number: (Drames-Alle Vendors)
	Item Number: 000000 (blanks=ALL Items)
	Tem Number. 000000 (Diames-All Items)
	Template or Order: O (T or O)
	remplate of order. O (1 of o)
77-7	TA-Drawnh TS-Drink
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.

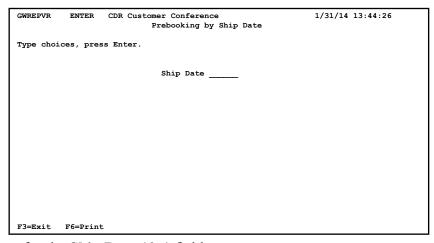
Printing A Pre-booking By Ship Date Report

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.



2. Select option 4 (Buyer By Ship Date) from the Pre-book Reports screen. The Pre-booking By Ship Date screen appears.

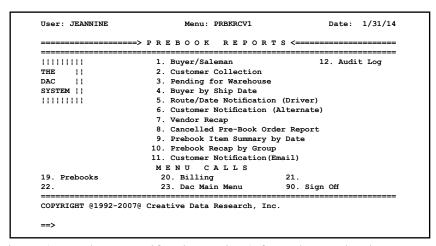


- 3. Enter a date for the **Ship Date** (6,n) field.
- 4. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

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.



2. Select option 5 (Route/Date Notification-Driver) from the Pre-book Reports screen. The Prompt Pre-book Report screen appears.

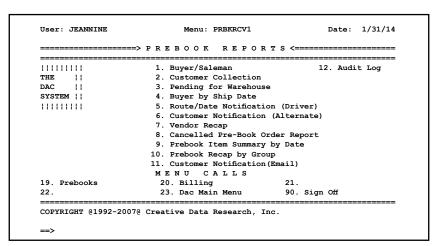
XPREPV3 ENT	ER CDR Customer Conference Prompt Pre-Book Rep	1/31/14 14:32:52 ort
	Input desired Data, then Pro Then Press CMD6	ess Enter
	Date Range: 000000 to 0000	000 (mmddyy)
	Route Range: to	_
If you have an	Report Message: e prebook items for next week. Y y questions please see store own tions please call Customer Servi	er, supervisor, chain purchasing.
F3=Exit F4=P	rompt 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.

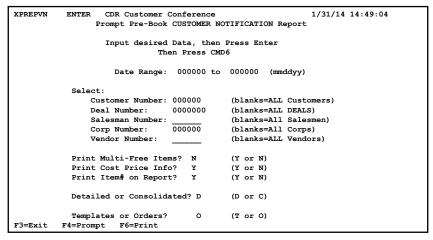
Printing A Customer Pre-book Notification Report

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.



2. Select option 6 (Customer Notification-Alternate) from the Pre-book Reports screen. The Prompt Pre-Book Customer Notification Report screen appears.



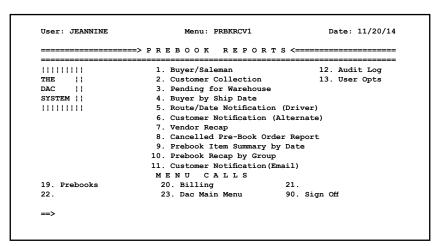
- 3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to shipping dates.
- 4. Enter data as necessary for the following fields:
 - **Customer Number** (6,n) a customer's number. Users can press <F4> to select a customer from the 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 prebook order numbers.
- 9. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

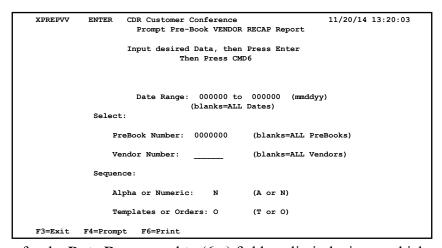
Printing A Pre-book Vendor Recap Report

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.



2. Select option 7 (Vendor Recap) from the Pre-book Reports screen. The Prompt Pre-book Vendor Recap Report screen appears.



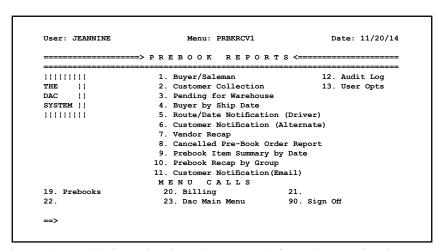
- 3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the items which are included in the report according to the shipping dates.
- 4. Enter data as necessary for the following fields:
 - **PreBook Number** (7,n) a pre-book order's number.
 - **Vendor Number** (6,a) a vendor code. 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 prebook order numbers.

7. Press <f6> (Print), and press <enter> to confirm. The Pre-book Reports screen appears.</enter></f6>

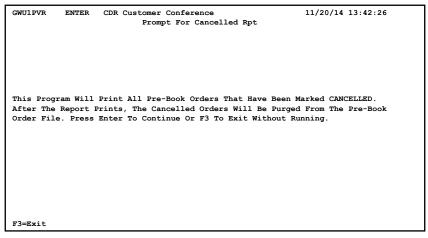
Printing A Report Of Cancelled Pre-book Orders

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.



2. Select option 8 (Cancelled Pre-book Order Report) from the Pre-book Reports screen. The Prompt For Cancelled Rpt screen appears.

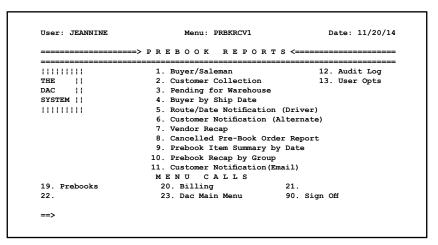


3. Press <Enter> to continue, and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Pre-booking Item Summary Report

The Pre-booking Item Summary report is provides a snapshop 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.



2. Select option 9 (Prebook Item Summary by Date) from the Pre-book Reports screen. The Pre-book Item Summary screen appears.

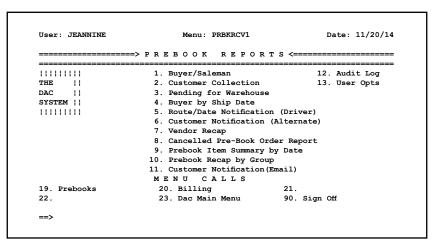
GWWMPVR ENTER CDR Cus	stomer Conference Prebook Item Summary	11/20/14 13:54:11
Type choices, press Enter.		
	From Date	
	Pre-book# (Optional)	
F3=Exit F6=Print		

- 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.

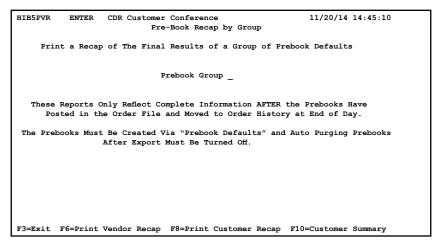
Printing Pre-book Recap By Group Reports

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.



2. Select option 10 (Prebook Recap by Group) from the Pre-book Reports screen. The Pre-book Recap by Group screen appears.



- 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.

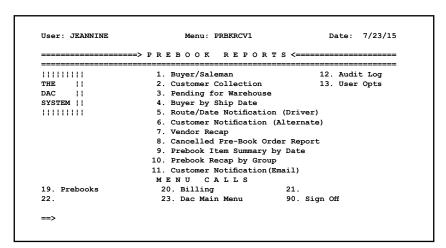
- 5. To print the Pre-book Customer Recap, press <F8>, and press <Enter> to confirm. The Pre-book Reports screen appears.
- 6. To print the Pre-book Recap Summary, press <F10>, and press <Enter> to confirm. The Pre-book Reports screen appears.

Emailing Pre-book Notifications

If outbound email functionality is enabled on the distributor's sytem, 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 attachements 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.



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)			
<u></u>			
Type choices, press Enter.			
Date Range: To			
1			
Customer #:			
Cust Coll #:			
<u></u>			
Salesman #:			
Corporate #:			
Email Reports? Y (Y,N,Blank)			
	Tarabada Damatan M		
Version: _ 1 (1,2) Include Online? N	Include Remote? N		
I			
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.