

# *DAC*

## *User Guide*

### **System File Maintenance**

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# Getting Started

The System Options applications and other functionality described in this document include:

- Working with document distribution records.
- Working with outbound email.
- Working with email address records.
- Edit System Messages
- Edit Form Messages
- Edit Company Name
- Calendar Records
- Deleting records.

Refer to the DAC Data Library Files document for lists of DAC database files which can be used with the IBM Query program to produce reports and create data files.

# Working With Document Distribution Records

The Work With Document Distribution application is used to automatically email:

- Invoices and credit memos when a user prints these documents.
- Remote order confirmation messages to the customer or to the sales rep when their remote order (via DAC Express, Pre-book orders, etc.) appears in DAC “live” orders.
- Velocity reports when they are printed.
- Notify of Price Changes reports (also called price change notifications) when they are printed.
- Accounts Receivable statements when *Y* is entered for the **Email Statements?** field of the Statements By... prompt screen.
- Accounts Receivable ACH notifications before ACH batches are exported.
- Customer Price Books and their indexes when they are printed. The corresponding text data files and spreadsheet files can also be emailed.
- Customer Pre-book Notification Reports or Pre-booked Items reports.
- Super item promotional flyers when a user manually processes them.

Refer to Emailing Purchase Orders and Adding Vendor Email Addresses for information about emailing purchase orders.

---

## Emailing Invoices and Credit Memos

Invoices and credit memos can be automatically emailed as PDF files attached to messages with the subject of *I#s.PDF* (where #s is the invoice number), and the message *Attached is invoice in PDF format*. The landscape/plain paper version H of the invoice is used for the attachment, but the distributor's designated version is used for printing the invoices. The PDF files that are emailed are also saved as documents in the DACEMAIL folder of the system.

Refer to the Billing document for additional information about printing invoices. Refer to SYS051 (General System Options) of the DAC Default System Options document for information about the **Enable Auto Emailing?** field.

Before invoices and credit memos can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who print the invoices and credit memos. Refer to Working With Directory Entries for additional information.

Refer to Adding A Document Distribution Record after the above prerequisites are complete.

---

## Emailing Remote Order Confirmations

An Order Acknowledgement report can be automatically emailed as a PDF file attached to a remote order confirmation message with the subject of OA#s.PDF (where #s is the customer's number), and the message *Thank you for your order. Attached you will find the acknowledgement report of the order in a PDF file.*

The remote order confirmation email message is emailed to the customer (and optionally to the sales rep) when their remote order (via DAC Express, Pre-book orders, etc.) appears in DAC "live" orders.

No reports are printed on the distributor's system when they are emailed, but the files that are sent as attachments will appear as documents in the DACEMAIL folder of the distributor's system.

Before remote order confirmations can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who process remote orders and the users who start the CV1COM job. Refer to Working With Directory Entries for additional information.

Refer to Adding A Document Distribution Record after the above prerequisites are complete.

---

## Emailing Velocity Reports

Velocity reports can be emailed as PDF or CSV files attached to messages with the subject of *VA#s.PDF* or *VA#s.CSV*, respectively, where #s is the customer or corporate number.

When a PDF file is attached, the email's message is *Attached you will find the velocity report you requested*. An item summary report can be attached as a PDF file to a second email message if designated by the user. These messages have the subject of *VC#s.PDF* (where #s is the customer or corporate number) and message of *Attached you will find the velocity item summary you requested*.

When a CSV file is attached, the email's message is *Attached you will find the velocity report data in CSV format as you requested*.

Velocity reports are not printed on the distributor's system when they are emailed, but the PDF files that are sent as attachments will appear as documents in the DACEMAIL folder of the distributor's system. The CSV files will appear as documents in the DACEMAIL folder unless another folder is designated by the user. Refer to *Printing A Velocity Report of the Customer File Maintenance* document for additional information.

Before velocity reports can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who print the velocity reports. Refer to *Working With Directory Entries* for additional information.

Refer to *Adding A Document Distribution Record* after the above prerequisites are complete.

---

## Emailing Price Change Notifications

Notify of Price Changes reports, also called price change notifications, can be automatically emailed as PDF file attachments to customers who:

- Require notification. Refer to Working With Customers of the Customer File Maintenance document for information about the Notify Price Chg field.
- Are authorized to purchase the items that are changed using global price changes. Refer to Working With Global Price Changes of the Item File Maintenance document for additional information.

Price change notifications are attached to email messages with the subject of *PC#s. PDF* (where #s is the customer or corporate number), and the message *Attached is your price change notification report*. The reports are also printed when the documents are emailed, and saved as documents in the DACEMAIL folder of the distributor's system.

The price change notifications are automatically emailed when option 5 (Price Change Notification) of the Special Customer Reports menu screen is used to print price change notifications. Refer to Printing Price Change Notifications of the Customer File Maintenance document for additional information.

Before price change notifications can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC user who generates the price change notifications. Refer to Working With Directory Entries for additional information.

Refer to Adding A Document Distribution Record after the above prerequisites are complete.



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## Emailing A/R Statements

Accounts Receivable (A/R) statements can be emailed as PDF files attached to messages with the subject of *ST#s.PDF* (where #s is the customer or corporate number), and the message *Attached is your A/R statement in Adobe Acrobat format.*

The plain paper version of the statement is used for the attachment. The PDF files that are emailed are also saved as documents in the DACEMAIL folder of the distributor's system.

Refer to the Accounts Receivable document for additional information about printing statements.

Before statements can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC user who prints the statements. Refer to Working With Directory Entries for additional information.

Refer to Adding A Document Distribution Record after the above prerequisites are complete.

---

## Emailing A/R ACH Notifications

Accounts Receivable ACH (Automatic Clearing House) notifications can be emailed as PDF files which are attached to messages with the subject and file name of *AC#s.PDF* where #s is the customer number. The email's message is *Attached is your ACH notification from* followed by the distributor's company name.

ACH notifications are not printed on the distributor's system when they are emailed, but the PDF files that are sent as attachments will appear as documents in the DACEMAIL folder of the distributor's system.

Before ACH notifications can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who will email the ACH notifications. Refer to Working With Directory Entries for additional information.

Refer to Adding A Document Distribution Record after the above prerequisites are complete.

---

## Emailing Customer Price Books

Customer price books can be emailed as PDF files which are attached to messages with the subject and file name of *PR#s.PDF* where #s is the customer number. The email's message is *Attached is your Custom Price List from* followed by the distributor's company name.

The customer price book's index will be attached as a PDF file to a second email message. These messages have the subject and file name of *PI#s.PDF* where #s is the customer number, and message of *Attached is your Custom Price List Index from* followed by the distributor's company name.

Customer price books and indexes are not printed on the distributor's system when they are emailed, but the PDF files that are sent as attachments will appear as documents in the DACEMAIL folder of the distributor's system.

The price books can also be emailed as text data file attachments and as spreadsheet file attachments. The email's message is *Attached is your Custom Price List in FIXED COLUMN format...* when a text data file is attached, and is *Attached is your Custom Price List in CSV format...* when a spreadsheet file is attached.

With one exception, the subjects and file names of these messages are designated by the user, and include the *DAT* and *CSV* file extensions respectively. If a customer collection is used to email these files to multiple customers, the subjects and file names are *CP#s.DAT* and *CP#s.CSV* respectively, where #s is the customer number.

The DAT and CSV files will appear as documents in the CV1COM folder on the distributor's system unless another folder is designated by the user. Refer to *Printing A Customer Price Book* of the Customer File Maintenance document for additional information.

Before customer price books can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who print the customer price books. Refer to *Working With Directory Entries* for additional information.

Refer to *Adding A Document Distribution Record* after the above prerequisites are complete.

---

## Emailing Pre-book Notifications

Customer Pre-book Notification Reports or the Pre-booked Items report can be emailed as PDF files attached to messages with the subject of *PB#s.PDF* (where #s is the customer or corporate number), and the message *Attached is your pre-book notification. If you have any questions, please contact your sales person.* The PDF files that are emailed are also saved as documents in the DACEMAIL folder of the system.

Refer to Emailing Pre-book Notifications of the Pre-book Orders document for additional information. Refer to SYS015 (General System Options) of the DAC Default System Options document for information about the **Prebook Notification Ver.** field.

Before pre-book notifications can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC user who generates the price change notifications. Refer to Working With Directory Entries for additional information.

Refer to Adding A Document Distribution Record after the above prerequisites are complete.

## Working With Super Item Promotional Flyers

Super item promotion flyers can be emailed as PDF files attached to messages with the subject of *EP#s.PDF* (#s is the customer or corporate number), and the message *Promotional Specials*. The PDF files that are emailed are also saved as documents in the DACEMAIL folder of the system.

Outbound email functionality must be enabled on the distributor's system before users can automatically email promotional flyers. Contact CDR support personnel for information about enabling outbound email and about automatically emailing promotional flyers with use of a scheduled job entry.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC users who email super item promotional flyers. Refer to Working With Directory Entries for additional information.

Refer to the Billing File Maintenance document for additional information about working with the super item type of selling allowances.

The instructions below are used to *manually* email promotional flyers ***after all the required document distribution records are created***. Refer to the Adding A Document Distribution Record for additional information.

```
User: JEANNINE          Menu: DACCV1          Date: 9/05/13
=====
> THE DAC SOFTWARE SYSTEM <=====
||||||| Distributor Analysis and Control |||||
||||||| MAIN OPERATIONS MENU |||||
=====
|||||||
THE  ||      1. File Maintenance Menu
DAC  ||      2. Accounts Receivable
SYSTEM ||    3. Billing System
|||||||    4. Inventory System
|||      5. Purchasing System
|||      6. Reports Menu
|||      7. Truck Scheduling
|||      8. Closing Procedures
|||      9. Integration
|||     10. Other Functions Menu
|||     11. Accounts Payable
|||     12. General Ledger
|||     90. Sign Off
=====
COPYRIGHT @1992-2012@ Creative Data Research, Inc.
===>
```

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

```

User: JEANNINE           Menu: FMCV1           Date: 9/05/13

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

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

=====
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==>

```

2. Select option 4 (System Options Maintenance) from the File Maintenance screen. The System Options screen appears.

```

User: JEANNINE           Menu: SOCV1           Date: 9/05/13

=====> S Y S T E M   O P T I O N S <=====
=====
|||||||      1. Default System Options
THE  ||      2. Closing Control Display
DAC  ||      3. Edit System Messages
SYSTEM ||    4. Edit Form Messages
|||||||      5. Edit Pick Print Options
                        6. About DAC CV1
                        7. Work with User Options
                        8. Edit Company Name Master
                        9. Generate Calendar Records
                        10. Edit Calendar File
                        11. Work with Licensed Products

19.                   20.                               21. Email Menu
22.                   23. Dac Main Menu                   90. Sign Off

==>

```

3. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.

```

User: JEANNINE           Menu: EMLCV1          Date: 9/05/13

=====> E M A I L   M E N U <=====
=====
|||||||      1. Customer Emails
THE  ||      2. Vendor Emails
DAC  ||      3. Corporate Emails
SYSTEM ||    4. Salesman Emails
|||||||      5. Work with Document Distribution
                        6. Manual EPROMO Process

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

=====
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==>

```

4. Select option 6 (Manual EPROMO Process) from the Email Menu screen. The Work With Document Distribution screen appears.

5. When the *Run the EPROMO list by entering a date range on the next screen* message appears, press <Enter>.
6. When the *To cancel leave the date ranges empty and press F3* message appears, press <Enter>. The Enter Date Range screen appears.
7. Enter the date range within which the super item selling allowance starts for the **Start Date** and **End Date** (6,n) fields, and press <Enter>.
8. Press <Enter> when prompted to confirm.

```

                                P R O M O T I O N A L       F L Y E R

                                From 9/01/13 -   9/30/13

Customer 100802 CRANKY CORNER QUICK STOP

Start      Page Item #   Description

9/01/13      1 500067   POWER BAR AUTUMN SHIPPER

Promo Contents =====
Qty  Contents                                Count Item      Retail      UPC
  5 POWER BAR ENERGY C/BERRY OATMEAL          15 500002         .60 097421450200
  5 POWER BAR HARVEST APPLE CRISP              15 500004         .60 097421450606
  5 POWER BAR HARVEST STRAWBERRY CRUNCH        15 500006         .60 097421050202

Cost Information =====

Customer Cost $    60.00
Retail . : $      0.33          Promotion Qty  225
Gross Profit $    15.00
Gross Prof.Pct    20.00

```

## Adding A Document Distribution Record

```
User: JEANNINE          Menu: DACCv1          Date: 6/16/15
=====
> THE DAC SOFTWARE SYSTEM <=====
||||||| Distributor Analysis and Control |||||
||||||| MAIN OPERATIONS MENU |||||
=====
|||||||
THE  || 1. File Maintenance Menu
DAC  || 2. Accounts Receivable
SYSTEM || 3. Billing System
||||||| 4. Inventory System
||||||| 5. Purchasing System
||||||| 6. Reports Menu
||||||| 7. Truck Scheduling
||||||| 8. Closing Procedures
||||||| 9. Integration
||||||| 10. Other Functions Menu
||||||| 11. Accounts Payable
||||||| 12. General Ledger
||||||| 90. Sign Off
=====
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==>
```

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

```
User: JEANNINE          Menu: FMCv1          Date: 6/16/15
=====
> FILE MAINTENANCE <=====
|||||||
THE  || 1. Customer Related Maintenance
DAC  || 2. Product Related Maintenance
SYSTEM || 3. Billing Related Maintenance
||||||| 4. System Options Maintenance
||||||| 5. Inquiry Options
||||||| 6. Price Maintenance
||||||| 7. G/L Interface Maintenance
||||||| 8. Scan Code Maintenance
||||||| 9. Miscellaneous File Maintenance
=====
M E N U   C A L L S
19. Deletions      20.          21. Reports
22.                23. Dac Main Menu  90. Sign Off
=====
==>
```

2. Select option 4 (System Options Maintenance) from the File Maintenance screen. The System Options screen appears.

```
User: JEANNINE          Menu: SOCV1          Date: 6/16/15
=====
> SYSTEM OPTIONS <=====
|||||||
THE  || 1. Default System Options
DAC  || 2. Closing Control Display
SYSTEM || 3. Edit System Messages
||||||| 4. Edit Form Messages
||||||| 5. Edit Pick Print Options
||||||| 6. About DAC CV1
||||||| 7. Work with User Options
||||||| 8. Edit Company Name Master
||||||| 9. Generate Calendar Records
||||||| 10. Edit Calendar File
||||||| 11. Work with Licensed Products
=====
19.                20.          21. Email Menu
22.                23. Dac Main Menu  90. Sign Off
=====
==>
```

3. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.



```

User: JEANNINE          Menu: EMLCV1          Date: 6/16/15

=====>  E M A I L  M E N U  <=====
=====
|||||||      1. Customer Emails
THE  ||      2. Vendor Emails
DAC  ||      3. Corporate Emails
SYSTEM ||    4. Salesman Emails
|||||||      5. Work with Document Distribution
|||||||      6. Manual EPROMO Process

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

==>

```

4. Select option 5 (Work With Document Distribution) from the Email Menu screen. The Work With Document Distribution screen appears.

```

DMA8DFR  DISPLAY CDR Customer Conference      6/16/15 10:47:16
                                Work with Document Distribution
Type      Recipient Key  Doc.ID Date
-----
E-Mail Override

Type options, press Enter.
2=Edit
? Type  Key      Name                      Doc.ID      LastSent
- CUSTNR 100002  DIANNE'S GROCERY                PRCCHG      8/26/13
  E-mail Override1 jeannine@cdrsoftware.com                15:26:56
  E-mail Override2
- CUSTNR 100003  BOB'S SHELL                  EPROMO      3/10/14
  E-mail Override1 harland@cdrsoftware.com                15:00:54
  E-mail Override2
- CUSTNR 100003  BOB'S SHELL                  STTMNT      6/16/15
  E-mail Override1 jeannine@cdrsoftware.com                10:20:04
  E-mail Override2
                                     +

F3=Exit F4=Search F10=Add

```

5. Press <F10> (Add). The Edit Doc. Distribution KEY SCREEN screen appears.

```

DMA9E1R  ADD      CDR Customer Conference      6/16/15 10:49:45
                                Edit Doc. Distribution KEY SCREEN

Type choices, press Enter.

Document ID . . . . . _____
Recipient Type . . . . . _____
Recipient Key . . . . . _____

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

```

6. Enter one of the following values for the **Document ID** (6,a) field, and press <Field Exit>:
  - *INVOCE* for emailing invoices.
  - *CRMEMO* for emailing credit memos.
  - *ORDACK* for emailing remote order confirmation messages.

- *VELOC* for emailing velocity reports.
  - *PRCCHG* for emailing price change notifications.
  - *STTMNT* for emailing A/R statements.
  - *ACHNOT* for emailing A/R ACH notifications.
  - *PRBOOK* for emailing customer price books.
  - *PREBOK* for emailing pre-book notifications.
  - *EPROMO* for emailing super item promotional flyers. Refer to Emailing Super Item Promotional Flyers below for additional information.
7. Enter one of the following values for the **Recipient Type** (6,a) field, or press <F4> to select a recipient type:
    - *CUSTNR* to email documents to a customer's address.
    - *CORPNR* to email documents to a corporate customer's address.
    - *EMPLNR* to email documents to the address of an account's sales rep.
  8. If the recipient type is *CUSTNR*, enter the desired customer number for the **Recipient Key** (6,a) field, or press <F4> to select the customer from the Select Customer Master screen.
  9. If the recipient type is *CORPNR*, enter the desired corporate customer number for the **Recipient Key** (6,a) field, or press <F4> to select the corporate customer from the Select Corporate Master screen.
  10. If the recipient type is *EMPLNR*, enter the desired employee number for the **Recipient Key** (6,a) field, or press <F4> to select the employee from the Select Employee Master screen.
  11. Press <Enter>. The Edit Document Distribution screen appears.

DMA9E1R	ADD	CDR Customer Conference	6/16/15 11:02:13
Edit Document Distribution			
Document Type	STTMNT		
Recipient Type	CUSTNR		
Recipient Key	900200	USA CONVENIENCE STORE #200	
Special Override Email Address Information If Required			
jeannine@cdrsoftware.com			
Last Sent	Time	0:00:00	
F3=Exit			
Email Address Defaulted from the Customer Master. Override It If Desired.			

If the recipient type is *CUSTNR*, and an email address was previously entered for the **Primary Email Address** or **2nd Email Address** fields of the customer's record, it will appear by default.

12. Enter one or two email addresses. If necessary, new addresses can be entered to override addresses appearing by default on the Edit Document Distribution

screen. The addresses stored in the Customer Master files are not affected.

13. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm.
14. When the Edit Doc. Distribution KEY SCREEN screen appears, continue adding document distribution records, or press <F3> to exit.

# Working With Outbound Email

To enable outbound email functionality on the distributor's system, contact CDR support personnel. After it is enabled, the DAC System administrator must create and edit directory entries to enable specific DAC users to use it. Refer to Working With Directory Entries for additional information.

Refer to Working With Document Distribution Records for information about the various documents and reports that can be emailed when outbound email functionality is enabled.

Refer to Emailing Purchase Orders and Adding Vendor Email Addresses for information about emailing purchase orders.

Outbound email functionality is also required for use of the following DAC optional modules:

- DAC Connect's email functionality is optional. If implemented, users can email invoices, custom order guides, price lists, customer price books and velocity reports. For user setup information, refer to the Working With New Users section of the DAC Connect Administrator User Guide.
- DAC Trade Show Manager's email functionality is optional. If implemented, administrative users of TSM can email the Trade Show Booth Recap report to attendees, and email a CSV file of attendee information to recipients of their choosing. For user setup information, refer to the Creating User Profile Records, Creating User Options Records and Working With Directory Entries sections of the DAC TSM Administrator User Guide.

The email functionality of the DAC Express module is limited to remote order acknowledgement. See Working With Document Distribution Records for additional information.

---

## Working With Directory Entries

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality.

To create a user's directory entry, enroll the user in iSeries Access:

1. Type GO MAIN.
2. Select option 11 (Client Access/400 Tasks).
3. Select option 21 (Enroll Client Access...).
4. Enter user ID for User Profile field.
5. Enter user ID for User ID field. If the user's ID is longer than eight characters, abbreviate it to enter in the User ID field.
6. Add to system directory = \*YES.

To enable use of the DAC email functionality:

1. Use WRKDIRE <Enter> and 2 (Change) with the new directory entry.
2. Use <F19> and <Enter>.
3. Enter the user's email name (*jeannine*) for SMTP user ID field.
4. Enter the user's email domain name (i.e. *cdrsoftware.com*) for the SMTP domain field.
5. Press <Enter> to add the data, and press <Enter> to update.

---

## Emailing Purchase Orders

Purchase orders are emailed as attachments to the vendor by using the E (Email) option on Work With Purchase Orders screen after the PO is printed. The PO is printed again with \*\*\* E-MAILED \*\*\* appearing at the top to the right of the vendor number, and an *S* (for *Sent*) code appears in the column to the left of the open Status code (*O*) on the Work With Purchase Orders screen. If an emailing error occurs, an *E* (for *Error*) code appears in the column to the left of the open Status code (*O*). After the cause of the error is resolved, the E option can be used again to email the PO.

The email message sent to the vendor will have the subject of *POEMAIL.PDF* and the message as defined during outbound email setup, and ending with *The PO number is #####*. (##### is purchase order's number)

Before purchase orders can be emailed, outbound email functionality must be enabled on the distributor's system. Contact CDR support personnel for information.

The DAC System administrator must create and edit directory entries to enable DAC users to use DAC email functionality. This setup is required for the DAC user who uses the Email option described above. Refer to Working With Directory Entries for additional information.

Refer to Adding Vendor Email Addresses after the above prerequisites are complete.

# Working With Email Address Records

The Email Menu application can be used to add email addresses for customers and vendors.

```
User: JEANNINE          Menu: DACCv1          Date: 8/27/13
=====> THE DAC SOFTWARE SYSTEM <=====
||||| Distributor Analysis and Control |||||
||||| MAIN OPERATIONS MENU |||||
=====
||||| 1. File Maintenance Menu
THE   || 2. Accounts Receivable
DAC   || 3. Billing System
SYSTEM || 4. Inventory System
||||| 5. Purchasing System
      6. Reports Menu
      7. Truck Scheduling
      8. Closing Procedures
      9. Integration
     10. Other Functions Menu
     11. Accounts Payable
     12. General Ledger
     90. Sign Off
=====
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==>
```

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

```
User: JEANNINE          Menu: FMCv1          Date: 8/27/13
=====> F I L E   M A I N T E N A N C E <=====
||||| 1. Customer Related Maintenance
THE   || 2. Product Related Maintenance
DAC   || 3. Billing Related Maintenance
SYSTEM || 4. System Options Maintenance
||||| 5. Inquiry Options
      6. Price Maintenance
      7. G/L Interface Maintenance
      8. Scan Code Maintenance

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

2. Select option 4 (System Options Maintenance) from the File Maintenance screen. The System Options screen appears.

```
User: JEANNINE          Menu: SOCV1          Date: 8/27/13

=====> S Y S T E M   O P T I O N S <=====
=====
|||||||
THE   ||      1. Default System Options
DAC   ||      2. Closing Control Display
SYSTEM ||     3. Edit System Messages
|||||||     4. Edit Form Messages
          5. Edit Pick Print Options
          6. About DAC CV1
          7. Work with User Options
          8. Edit Company Name Master
          9. Generate Calendar Records
         10. Edit Calendar File
         11. Work with Licensed Products

19.          20.          21. Email Menu
22.          23. Dac Main Menu      90. Sign Off

===>
```

3. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.

```
User: JEANNINE          Menu: EMLCV1          Date: 8/27/13

=====> E M A I L   M E N U <=====
=====
|||||||
THE   ||      1. Customer Emails
DAC   ||      2. Vendor Emails
SYSTEM ||     3. Corporate Emails
|||||||     4. Salesman Emails
          5. Work with Document Distribution
          6. Manual EPROMO Process

          M E N U   C A L L S

19.          20.          21.
22.          23. Dac Main Menu      90. Sign Off

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



## Adding Customer Email Addresses

The instructions below are used to add email addresses for individual customers.

```
User: JEANNINE          Menu: SOCV1          Date: 8/27/13

=====> S Y S T E M   O P T I O N S <=====
=====
|||||
THE   ||
DAC   ||
SYSTEM ||
|||||
1. Default System Options
2. Closing Control Display
3. Edit System Messages
4. Edit Form Messages
5. Edit Pick Print Options
6. About DAC CV1
7. Work with User Options
8. Edit Company Name Master
9. Generate Calendar Records
10. Edit Calendar File
11. Work with Licensed Products

19.
22.

====>
```

1. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.

```
User: JEANNINE          Menu: EMLCV1          Date: 8/27/13

=====> E M A I L   M E N U <=====
=====
|||||
THE   ||
DAC   ||
SYSTEM ||
|||||
1. Customer Emails
2. Vendor Emails
3. Corporate Emails
4. Salesman Emails
5. Work with Document Distribution
6. Manual EPROMO Process

19.
22.

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

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

2. Select option 1 (Customer Emails) from the Email Menu screen. The Work With Customer Emails screen appears.

```

HIY5DFR      DISPLAY CDR Customer Conference      8/27/13 11:19:56
                                Work with Customer Emails
Cust#      Email 1
_____

2=Edit

? Cust#      Customer Name
_      99000 99 MART PLUS
Email 1      jeannine@cdrsoftware.com
Email 2
_      100001 STOP 'N SHOP
Email 1
Email 2
_      100002 DIANNE'S GROCERY
Email 1
Email 2
_      100003 BOB'S SHELL
Email 1
Email 2
+

F3=Exit F4=Search F6=Print F15=Export

```

3. Use the **Cust#** restrictor field (or <Page Down>) to locate the desired customer.

```

HIY5DFR      DISPLAY CDR Customer Conference      8/27/13 11:19:56
                                Work with Customer Emails
Cust#      Email 1
100301      _____

2=Edit

? Cust#      Customer Name
_      100301 THREE RIVERS CHEVRON
Email 1
Email 2
_      100801 BARON EXPRESS #2 BP
Email 1
Email 2
_      100802 CRANKY CORNER QUICK STOP
Email 1
Email 2
_      100850 EXPRESS WAY FOOD MART
Email 1
Email 2
+

F3=Exit F4=Search F6=Print F15=Export

```

4. Enter 2 (Edit) next to the customer's number, and press <Enter>. The Customer Extended Information screen appears.

```

                                Customer Extended Information
Customer 100301 THREE RIVERS CHEVRON
Owner Personal Information:
Name . _____ SSN _____
Address 1 _____
Address 2 _____
City . _____ State __ Zip ____ - ____
Gender _ Birth Date _____ DL# _____ DL# State __
Primary Email Address:
_____
2nd Email Address:
_____
International Postal Code ____ - ____ Send Order Ack? _ (Y,N,Blank)

F3=Exit F10=Customer Shipping Information

```

5. Enter the customer's email address for the **Primary Email Address** field.

6. If desired, enter a second email address for the **2nd Email Address** field.

7. Enter **Y** for the **Send Order Ack?** field only if the addresses will be used for

emailing price change notifications or remote order confirmations to the customer.

8. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Work With Customer Emails screen appears.
9. Repeat the previous instructions to continue adding email addresses, or press <F3> to exit.

## Adding Vendor Email Addresses

The instructions below are used to add email addresses for vendors.

```
User: JEANNINE          Menu: SOCV1          Date: 8/27/13

=====> S Y S T E M   O P T I O N S <=====
=====
|||||
THE   ||      1. Default System Options
DAC   ||      2. Closing Control Display
SYSTEM ||     3. Edit System Messages
|||||      4. Edit Form Messages
|||||      5. Edit Pick Print Options
|||||      6. About DAC CV1
|||||      7. Work with User Options
|||||      8. Edit Company Name Master
|||||      9. Generate Calendar Records
|||||     10. Edit Calendar File
|||||     11. Work with Licensed Products

19.
22.

====>
```

1. Select option 21 (Email Menu) from the System Options screen. The Email Menu screen appears.

```
User: JEANNINE          Menu: EMLCV1          Date: 8/27/13

=====> E M A I L   M E N U <=====
=====
|||||
THE   ||      1. Customer Emails
DAC   ||      2. Vendor Emails
SYSTEM ||     3. Corporate Emails
|||||      4. Salesman Emails
|||||      5. Work with Document Distribution
|||||      6. Manual EPROMO Process

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

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

2. Select option 2 (Vendor Emails) from the Email Menu screen. The Work With Vendor Emails screen appears.

```

HIY9DFR      DISPLAY CDR Customer Conference      8/27/13 12:55:42
                                Work With Vendor Emails
Vendor  E-Mail Address 1
_____

Type options, press Enter. 2=Edit

? Vendor  Vendor Name
  Number
  _ ALT001  ALTADIS USA
    E-mail 1
    E-Mail 2
    E-Mail 3
    E-Mail 4
  _ AMER01  AMERICAN SNUFF COMPANY
    E-mail 1  jeannine@cdrsoftware.com
    E-Mail 2
    E-Mail 3
    E-Mail 4
                                           +

F3=Exit F4=Search F6=Print F15=Export

```

3. Use the **Vendor** restrictor field (or <Page Down>) to locate the desired vendor.

```

HIY9DFR      DISPLAY CDR Customer Conference      8/27/13 12:55:42
                                Work With Vendor Emails
Vendor  E-Mail Address 1
HEI001 _____

Type options, press Enter. 2=Edit

? Vendor  Vendor Name
  Number
  _ HEI001  HEINZ USA
    E-mail 1
    E-Mail 2
    E-Mail 3
    E-Mail 4
  _ HER001  HERSHEY CHOCOLATE
    E-mail 1
    E-Mail 2
    E-Mail 3
    E-Mail 4
                                           +

F3=Exit F4=Search F6=Print F15=Export

```

4. Enter 2 (Edit) next to the vendor's code, and press <Enter>. The Enter Vendor Notes screen appears.

```

                                Enter Vendor Notes
Vendor HEI001 HEINZ USA      PIN _____
_____
_____
_____
Primary E-Mail: _____
CC E-Mail 1:  _____
CC E-Mail 2:  _____
CC E-Mail 3:  _____
Populate PO Msg #1? _ Sort PO By MFR #? _ Portal Show Prices? _
Document Sort: _ (A,L,I,B,M) Tax Paid Vendor . _

```

5. Enter the vendor's email address for the **Primary E-mail** field.
6. If desired, enter additional email addresses for the **CC E-mail 1**, **CC E-mail 2** and **CC E-mail 3** fields.

7. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Work With Vendor Emails screen appears.
8. Repeat the previous instructions to continue adding email addresses, or press <F3> to exit.

# Working With System Message Records

The Edit System Messages application is used:

- To define scan messages from which radio frequency device users can select when receiving purchase orders.
- To define invoice messages from which Pre-book Ordering System users can select when exporting pre-book orders. Refer to Working With Export Options of the Pre-book Orders document for additional information.

```
User: JEANNINE          Menu: DACCVI          Date: 7/01/13
=====> THE DAC SOFTWARE SYSTEM <=====
||||||| Distributor Analysis and Control |||||
||||||| MAIN OPERATIONS MENU |||||
=====
|||||||
THE  ||      1. File Maintenance Menu
DAC  ||      2. Accounts Receivable
SYSTEM ||    3. Billing System
|||||||    4. Inventory System
|||||||    5. Purchasing System
|||||||    6. Reports Menu
|||||||    7. Truck Scheduling
|||||||    8. Closing Procedures
|||||||    9. Integration
|||||||   10. Other Functions Menu
|||||||   11. Accounts Payable
|||||||   12. General Ledger
|||||||   90. Sign Off
=====
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==>
```

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

```
User: JEANNINE          Menu: FMCV1          Date: 7/01/13
=====> F I L E   M A I N T E N A N C E <=====
|||||||
THE  ||      1. Customer Related Maintenance
DAC  ||      2. Product Related Maintenance
SYSTEM ||    3. Billing Related Maintenance
|||||||    4. System Options Maintenance
|||||||    5. Inquiry Options
|||||||    6. Price Maintenance
|||||||    7. G/L Interface Maintenance
|||||||    8. Scan Code Maintenance

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

2. Select option 4 (System Options Maintenance) from the File Maintenance screen. The System Options screen appears.

```

User: JEANNINE                      Menu: SOCV1                      Date: 7/01/13

===== > S Y S T E M   O P T I O N S < =====
=====

|||||
THE    ||
DAC    ||
SYSTEM ||
|||||

1. Default System Options
2. Closing Control Display
3. Edit System Messages
4. Edit Form Messages
5. Edit Pick Print Options
6. About DAC CV1
7. Work with User Options
8. Edit Company Name Master
9. Generate Calendar Records
10. Edit Calendar File
11. Work with Licensed Products

19.
22.

20.
23. Dac Main Menu

21. Email Menu
20. Sign Off

==>

```

3. Select option 3 (Edit System Messages) from the System Options screen. The Edit Message Master screen appears.
4. Press <F9> (Go to 'Add' mode).

```
DSLUEFR      ADD      CDR Customer Conference       7/01/13 13:55:54  
                  Edit Message Master
```

Type options, press Enter.  
D=Delete request

? Message Id	Message Text
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____
- _____	_____

F3=Exit      F9=Go to 'Change' mode

+

5. Enter data for the following fields, and press <Field Exit> after each entry:
  - **Message Id** (6,a) - radio frequency device users should enter *SCAN##* where ## is a 2-digit number other than 01, 02, 03, 99 or one previously used to define a scan message. Pre-book Ordering System users should enter *PB####* where #### is a 4-digit number between 0001 and 9999.
  - **Message Text** (35,a) - the message text.
6. Press <Enter> when data entry is complete.
7. Press <Enter> when prompted to confirm.
8. Continue entering data to create new messages, as necessary, and press <F3> at the Edit Message Master screen to exit. The System Options screen appears.



# Working With Form Messages

The Edit Form Messages application is used to designate the text printed on various DAC reports and documents. The instructions below describe the predefined form messages.

```
User: JEANNINE          Menu: DACCv1          Date: 7/02/13
=====
> THE DAC SOFTWARE SYSTEM <=====
||||||| Distributor Analysis and Control |||||
||||||| MAIN OPERATIONS MENU |||||
=====
|||||||
THE    ||      1. File Maintenance Menu
DAC    ||      2. Accounts Receivable
SYSTEM ||      3. Billing System
|||||||      4. Inventory System
|||||||      5. Purchasing System
|||||||      6. Reports Menu
|||||||      7. Truck Scheduling
|||||||      8. Closing Procedures
|||||||      9. Integration
|||||||     10. Other Functions Menu
|||||||     11. Accounts Payable
|||||||     12. General Ledger
|||||||     90. Sign Off
=====
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==>
```

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

```
User: JEANNINE          Menu: FMCv1          Date: 7/02/13
=====
> F I L E   M A I N T E N A N C E <=====
=====
|||||||      1. Customer Related Maintenance
THE    ||      2. Product Related Maintenance
DAC    ||      3. Billing Related Maintenance
SYSTEM ||      4. System Options Maintenance
|||||||      5. Inquiry Options
|||||||      6. Price Maintenance
|||||||      7. G/L Interface Maintenance
|||||||      8. Scan Code Maintenance
=====
M E N U   C A L L S
19. Deletions      20.
22.                23. Dac Main Menu      21. Reports
                      90. Sign Off
=====
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==>
```

2. Select option 4 (System Options Maintenance) from the File Maintenance screen.  
The System Options screen appears.

```

User: JEANNINE          Menu: SOCV1          Date: 7/02/13

===== > S Y S T E M   O P T I O N S < =====
=====
|||||||
THE  ||      1. Default System Options
DAC  ||      2. Closing Control Display
SYSTEM ||    3. Edit System Messages
|||||||    4. Edit Form Messages
|||       5. Edit Pick Print Options
|||       6. About DAC CV1
|||       7. Work with User Options
|||       8. Edit Company Name Master
|||       9. Generate Calendar Records
|||      10. Edit Calendar File
|||      11. Work with Licensed Products

19.
22.

==>
20.
23. Dac Main Menu
21. Email Menu
90. Sign Off

```

3. Select option 4 (Edit Form Messages) from the System Options screen. The Edit Form Messages File screen appears, and displays a numbered list of previously defined messages.

```

DSQBEFR  CHANGE  CDR Customer Conference          7/02/13 13:07:33
                        Edit Form Messages File
Application code .    Message Number .

Type options, press Enter.
D=Delete request

? App  Message
code  Number
- ALW   1      Message Text
- ALW   2      Message Text
- ALW   3      Message Text
- ALW   4      Message Text
- ALW   5      Message Text
- ALW   6      Message Text
+

F3=Exit  F9=Go to 'Add' mode

```

Each form message record consists of an application code, a message number and text. Following are application codes used for the **App code** (3,a) field:

- *ALW* - selling allowance. Refer to Working With Selling Allowances of the Billing File Maintenance document for information about using the allowance messages (ALW1 through ALW7) for printing deal sheets.
- *CIM* - customer invoice message. This value is entered when users create customer-specific form messages for printing on invoices. Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document for additional information.
- *HTP* - used with the DAC Connect optional module. Refer to the DAC Connect Administrator User Guide for additional information.
- *INV* - invoice. Refer to Working With Invoice Boxes of the Billing File Maintenance document for information about the text of INV1 through INV3 which is used for column headings above invoice boxes. Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document

for information about the invoice messages using INV9 through INV18, and INV30 through INV36.

- *OBK* - order book. Refer to Printing Bar Code Order Books of the Order Books document for information about the text used (OBK1 through OBK4) to customize bar code order books.
  - *OS* - out of stock message. This value is entered, with a third character, when users create messages for printing on invoices if an item is ordered, but out of stock. The third character which is entered an *OS* application code, such as *D* of *OSD*, is entered for the **Mfr. Out of Stock Code** field when entering an item record. Refer to Working With Invoice and Pick Messages and Defining Form Messages of the Billing File Maintenance document for additional information about printing out of stock messages.
  - *PIC* - pick lists. Refer to Defining Form Messages of the Billing File Maintenance document for information about the pick messages which are printed at the top of all a designated customer's pick lists.
  - *PUR* - purchasing. Refer to the Purchasing document for information about the purchasing messages which are printed at the bottom of purchase orders (PUR1 through PUR4) and purchasing receipts (PUR1 through PUR3).
  - *ST1* - stamp tax reports. The values entered are used as column headings on state level cigarette stamp tax reports. Refer to Printing Cigarette Stamp Tax Reports of the Tax System document for additional information.
  - *TT5* - stamp tax reports. The values entered are used as column headings on Tobacco Tax Report #5. Refer to Printing Stamp Tax Reports For Other Tobacco Products of the Tax System document for additional information.
  - *TT6* - stamp tax reports. The values entered are used as column headings on Tobacco Tax Report #6. Refer to Printing Stamp Tax Reports For Other Tobacco Products of the Tax System document for additional information.
  - *X* - customer invoice message. This value is entered when users create messages that are printed on the invoices of a specific state. Refer to Working With Invoice and Pick Messages of the Billing File Maintenance document for additional information.
4. Press <Page Down> to display the complete list (as illustrated below) of predefined form messages.

```

DSQBEFR    CHANGE    Creative Data Research, Inc.                4/14/09 15:03:45
                        Edit Form Messages File
Application code .    ____ Message Number .    ____

Type options, press Enter.
D=Delete request

? App  Message
  code Number
- ALW    7          Message Text
- CIM    10         Message Text
                Finance Charge of 1.33% will be charged for any amount past terms
- INV    1          Message Text
                PREM. ]GENER.]SUBGEN]VALUE ]PREM. ]GENER.]SUB  ]VALUE ]SUBSUB ]SUBSUB
- INV    2          Message Text
                REG./ ]REG./ ]REG./ ]100'S ]100'S ]100'S ]100'S ]GENER. ]GENER.
- INV    3          Message Text
                KINGS ]KINGS ]KINGS ]120'S ]120'S ]120'S ]120'S ]KINGS ]100'S
- INV    9          Message Text
                        **** Manufacturer Out of Stock ****
F3=Exit    F9=Go to 'Add' mode

```

```

DSQBEFR    CHANGE    Creative Data Research, Inc.                4/14/09 15:06:01
                        Edit Form Messages File
Application code .    ____ Message Number .    ____

Type options, press Enter.
D=Delete request

? App  Message
  code Number
- INV    30         Message Text
                        *** Credit On Merchandise ***
- INV    32         Message Text
                Number of Returned Totes _____
- INV    33         Message Text
                *** INVOICE SURCHARGE ***
- INV    34         Message Text
                CRV Tax Charged On The Above Line In The Amount Of:
- OBK    1          Message Text
                |   | WK1 | WK2 | WK3 | WK4 | WK5 | WK6 | WK7 | WK8
- OBK    2          Message Text
                | QTY |IN OR|IN OR|IN OR|IN OR|IN OR|IN OR|IN OR|IN OR
F3=Exit    F9=Go to 'Add' mode

```

```

DSQBEFR    CHANGE    Creative Data Research, Inc.                4/14/09 15:14:25
                        Edit Form Messages File
Application code .    OBK Message Number .    3

Type options, press Enter.
D=Delete request

? App  Message
  code Number
- OBK    3          Message Text
                |   |   |   |   |   |   |   |   |   |   |   |   |
- OBK    4          Message Text
                |   |   |   |   |   |   |   |   |   |   |   |   |
- OSA    1          Message Text
                Out of Stock Message
- OSD    1          Message Text
                Discontinued by manufacturer
- PIC    1          Message Text
                ***** Do NOT send totes *****
- PIC    2          Message Text
F3=Exit    F9=Go to 'Add' mode

```

```

DSQBEFR    CHANGE    Creative Data Research, Inc.                4/14/09 15:14:49
                                Edit Form Messages File
Application code .    OBK    Message Number .    3

Type options, press Enter.
D=Delete request

? App    Message
code    Number
- PIC    3                Message Text
- PUR    1                Message Text
    P.O. # MUST APPEAR ON ALL SHIPPING DOCUMENTS
- PUR    2                Message Text
    DELIVERY APPOINTMENT REQUIRED FOR 100 CASE OR MORE
- PUR    3                Message Text
    RECEIVING MONDAY -THURSDAY 8:00- 2:30 FRIDAY 8:00 11:30
- PUR    99               Message Text
    P.O. # must appear on all shipping documents
- ST1    1                Message Text
    Qty    Qty    Qty    Total    +
F3=Exit    F9=Go to 'Add' mode

```

```

DSQBEFR    CHANGE    Creative Data Research, Inc.                4/14/09 15:15:07
                                Edit Form Messages File
Application code .    OBK    Message Number .    3

Type options, press Enter.
D=Delete request

? App    Message
code    Number
- ST1    2                Message Text
    10-20's    8-25's    10-25's    Tax
- TT5    1                Message Text
    Non-Smoking    Smoking
- TT5    2                Message Text
    Tobacco    Tobacco
- TT6    1                Message Text
    QTY    TOBACCO
- TT6    2                Message Text
    COST
- XLA    100              Message Text
    State Sales Tax increases 1% on September 1st
F3=Exit    F9=Go to 'Add' mode

```

5. If necessary, the text of any predefined form message can be changed by editing the **Message Text** field, and pressing <Enter> twice.
6. Press <F3> to exit. The System Options screen appears.

# Working With Company Names

After warehouse records are added, company name records are added in the Company Name Master file. Users with multiple warehouses add one or more company name records according to the following criteria:

- With a single AS/400 system, multiple company name records are added, one for each warehouse, to the Company Name Master file.
- With multiple AS/400 systems, a single company name record is added to the Company Name Master file of each system.

Refer to Working With Warehouses of the Item File Maintenance document for additional information.

The following instructions describe using the Edit Company Name Master Details screen to add company name records.

```
User: JEANNINE          Menu: SOCV1          Date: 5/03/06

===== > S Y S T E M   O P T I O N S <=====
=====
|||||||      1. Default System Options
THE  ||      2. Closing Control Display
DAC  ||      3. Edit System Messages
SYSTEM ||    4. Edit Form Messages
|||||||      5. Edit Pick Print Options
|||||||      6. About DAC CV1
|||||||      7. Work with User Options
|||||||      8. Edit Company Name Master
|||||||      9. Generate Calendar Records
|||||||     10. Edit Calendar File
|||||||     11. Work with Licensed Products

19.          20.          21.
22.          23. Dac Main Menu    90. Sign Off

=====
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==>
```

1. Select option 8 (Edit Company Name Master) from the System Options Menu. The Edit Company Name Master KEY SCREEN screen appears.

```
DSIU1R  CHANGE  Creative Data Research          5/03/06  9:29:09
                        Edit Company Name Master KEY SCREEN

Warehouse Code .

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

2. Press <F9> (Go to 'Add' mode).

```

DSIUe1R   ADD      Creative Data Research      5/03/06  9:31:29
                  Edit Company Name Master KEY SCREEN

Warehouse Code .

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

```

3. Enter the code of the company's warehouse for the **Warehouse Code** (6,a) field, and press <Enter>. The Edit Company Name Master Details screen appears.

```

DSIUe1R   ADD      Creative Data Research      5/03/06  9:46:48
                  Edit Company Name Master Details

Warehouse Code . . . . . : 1
Company Name . . . . .
Company Addr 1 . . . . .
Company Addr 2 . . . . .
Company Addr 3 . . . . .
Company City . . . . .
Company State . . . . .      Zip      Zip Ext.
Company Shipto Fax Number .
Company Shipto Data Phone .
Company Shipto Phone # . .
Company Shipto Name . . .
Company Shipto Addr 1 . .
Company Shipto Addr 2 . .
Company Shipto Addr 3 . .
Company Shipto City . . .
Company Shipto State . .      Zip      Zip Ext.
Print Company Name On Inv.? (Y, N, Blank)
FEIN Identifier      License Number

F3=Exit   F12=Key screen

```

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

- **Company Name** (35,a) - name of the company which is printed on purchase orders with the "bill to" address information below.

The value entered for this field can be printed on invoices if Formless Printing, a DAC optional module, is used for printing invoices (see **Print Company Name On Inv?** field below).

The value entered for this field, not the **Company ShipTo Name** field (see below), is used by the Unitrac applications for manufacturer reporting. Refer to Working With Unitrac of the Item File Maintenance document for additional information.

- **Company Addr 1** (25,a) - street number and street name of the company's billing address.
- Optional: **Company Addr 2 - Company Addr 3** (25,a) - the remaining

portion of the company's billing address, such as post office box number.

- **City** (25,a) - the city of the company's billing address.
- **State** (2,a) - the state of the company's billing address.
- **Zip** (5,n) - the zip code of the company's billing address.
- **Zip Ext.** (4,n) - the 4-digit extension the zip code of the company's billing address.
- Optional: **Company Shipto Fax Phone** (3+7,n) - the company's area code and telephone number for fax transmission.
- Optional: **Company Shipto Dataline** (3+7,n) - the company's area code and telephone number for data transmission.
- Optional: **Company Shipto Phone #** (3+7,n) - the company's area code and telephone number.
- **Company ShipTo Name** (35,a) - name of the company which is printed on purchase orders with the shipping address information below.

5. Enter data for the following fields, and press <Field Exit> after each entry. The values of these fields are used by the Unitrac applications for manufacturer reporting. Refer to Working With Unitrac of the Item File Maintenance document for additional information.

- **Company ShipTo Addr 1** (25,a) - street number and street name of the company's shipping address.
- Optional: **Company ShipTo Addr 2 - Company Shipto Addr 3** (25,a) - the remaining portion of the company's shipping address, such as post office box number.
- **Company ShipTo City** (25,a) - the city of the company's shipping address.
- **Company ShipTo State** (2,a) - the state of the company's shipping address.
- **Zip** (5,n) - the zip code of the company's shipping address.
- **Zip Ext.** (4,n) - the 4-digit extension the zip code of the company's shipping address.

6. If Formless Printing is used for printing invoices, the value of *Y* (yes) can be



entered for the **Print Company Name On Inv.?** (1,a) field to print the name entered for the **Company Name** field and for the “bill to” address information above on invoices. This is only recommended for use when a company’s logo is not printed on invoices, and more than one company name record exists for multiple warehouses. Refer to SYS031 (Invoice Options) of the DAC Default System Options document for information about the **Print Company Name On Laser Forms?** field.

7. If the distributor is required to submit cigarette and tobacco tax reports to the State of Michigan, enter data for the following fields, and press <Field Exit> after each entry:
  - **FEIN Identifier** (9,n) - the distributor’s Federal Employee Identification Number.
  - **License Number** (9,n) - the distributor’s Tobacco Tax License Number.
8. Press <Enter> when data entry is complete.
9. Press <Enter> when prompted to confirm. The Edit Company Name Master KEY SCREEN screen appears with the *Record added* message.

# Working With Calendar Records

Calendar records are used primarily to define the closing dates used when executing DAC closing procedures. If calendar records are not added, the system date is used for the closing date.

Calendar records ***must be used*** if the distributor ever runs the End Of Day closing procedure after midnight of the day on which invoice posting is done.

If calendar records are used, the following values must be entered for the SYS033 (Billing) default system option:

- *Y* (for yes) must be entered for the **Use calendar value?** field.
- *\*NO* must be entered for the **Feed Closing Schedule?** field.

---

## Adding Calendar Records

Calendar records are added for one year at a time, and must be added for an upcoming year before closing the current year. Refer to the DAC Closing Procedures document for information about end of year processing.

Before adding calendar records for the first time, enter the **CLRPFM BSDQREP AS/400** command (and press <Enter>) to clear the calendar file. Users who have previously generated calendar records ***must not*** enter this command.

1. Select option 9 (Generate Calendar Records) from the System Options screen. The Create Calendar Records screen appears.

BSPKPV	ENTER	Creative Data Research	9/21/99 17:39:34			
Create Calendar Records						
Create Calendar Records For Year: (1940 - 2039)						
Specify Which Days You Normally End The Day On:						
D=End Day Only W=End Day And End Week						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
-	-	-	-	-	-	-
Specify Defaults For Days Of The Week:						
(1=Monday 2=Tuesday 3=Wednesday 4=Thursday 5=Friday 6=Saturday 7=Sunday)						
(These Day Numbers Will Be Used For Assigning Delivery Routes.)						
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
1	2	3	4	5	6	7
Specify The Date That Week 1 Will Begin On:						
F3=Exit F10=Generate Calendar Records F11=Prompt To Delete Records						

2. Enter the year for which the records are being created for the **Create Calendar Records For Year (4,n)** field.
3. Enter *D* for any of the **Monday** through **Sunday** (1,a) fields highlighted above to designate the days of the week on which only the end of day processing is usually executed.

4. Enter *W* for any of the **Monday** through **Sunday** (1,a) fields highlighted above to designate the day of the week on which both the end of day and end of week processing are usually executed.
5. Enter one of the following values for each of the **Monday** through **Sunday** (1,n) fields for use in assigning delivery routes:
  - 1 - Monday                      • 4 - Thursday • 6 - Saturday
  - 2 - Tuesday                    • 5 - Friday                      • 7 - Sunday
  - 3 - Wednesday

Refer to Working With Customers of the Customer File Maintenance document for information about the **Delivery Route 1 - Delivery Route 7** fields.

6. Enter a date for the **Specify The Date That Week 1 Will Begin On** (6,n) field.

```

BSPKPV  ENTER   Creative Data Research                      9/22/99 10:05:34
                        Create Calendar Records

Create Calendar Records For Year: 1999  (1940 - 2039)

                        Specify Which Days You Normally End The Day On:
                        D=End Day Only  W=End Day And End Week

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday
  D           D           D           D           W

                        Specify Defaults For Days Of The Week:
(1=Monday 2=Tuesday 3=Wednesday 4=Thursday 5=Friday 6=Saturday 7=Sunday)
(These Day Numbers Will Be Used For Assigning Delivery Routes.)

Monday  Tuesday  Wednesday  Thursday  Friday  Saturday  Sunday
  1           2           3           4           5           5           5

Specify The Date That Week 1 Will Begin On: 10499

F3=Exit  F10=Generate Calendar Records  F11=Prompt To Delete Records
  
```

7. Press <F10> (Generate Calendar Records) when data entry is complete. The *Calendar Records For Year ... Have Been Generated* message appears when processing is complete.
8. Press <F3> to exit when the new calendar records are generated.

Note: ***Before executing end of day processing the first time***, users must verify that the value of the **Date No. 1** field of the Closing Control Key Record for Current is correct. If the current date is not displayed for the **Date No. 1** field, contact CDR support personnel. Refer to Working With Closing Control Display of the DAC Closing Procedures document for information about using option 2 (Closing Control Display) of the Systems Option screen to check the **Date No. 1** field as illustrated below.

DSL1D1R	DISPLAY Creative Data Research	2/23/01 14:07:02
Closing Control Display Details		
Control Key: CURRENT    Current Values    Last User:		
Year: 1    Quarter: 1    Period: 2    Week: 9    Production Day: 1		
Narrative		
Date No. 1: 2/23/01    Current Production Date		
Date No. 2:		
Date No. 3:		
Date No. 4:		
Last Step Started...    Time:    Date:		
Last Step Completed:    Time:    Date:		
Status Narrative		
Recovery Status:    Status 1:		
Status 2:    Status 3:		
Status 4:    Status 5:		
Status 6:    Status 7:		
F3=Exit    F5=Reload Subfile    F12=Key screen		

## Editing Calendar Records

After adding the calendar records for an upcoming year, the Edit Calendar File application is used to make any necessary changes to the closing dates, and designate on which dates closing procedures will be executed.

1. Select option 10 (Edit Calendar File) from the System Options screen. The Edit Calendar File screen appears.

```
BSPGFEFR  CHANGE  Creative Data Research          9/22/99 10:06:38
                                Edit Calendar File
Calendar Date

Type options, press Enter.

? Calendar  Day   Prod.   Day Wk Pd Q  Yr  EOD   EOW   EOP   EOY
   Date      Date      (Y/N) (Y/N) (Y/N) (Y/N)
1/01/99  FRI   1/01/99  5      1  1  99
1/02/99  SAT   1/02/99  5      1  1  99
1/03/99  SUN   1/03/99  5      1  1  99
1/04/99  MON   1/04/99  1      1  1  99
1/05/99  TUE   1/05/99  2      1  1  99
1/06/99  WED   1/06/99  3      1  1  99
1/07/99  THU   1/07/99  4      1  1  99
1/08/99  FRI   1/08/99  5      1  1  99
1/09/99  SAT   1/09/99  5      1  1  99
1/10/99  SUN   1/10/99  5      1  1  99
1/11/99  MON   1/11/99  1      2  1  99
+

F3=Exit
```

During the course of editing calendar records, the Edit Calendar File screen can be redisplayed beginning with the calendar date entered for the **Calendar Date** restrictor field (see below).

```
BSPGFEFR  CHANGE  Creative Data Research          9/22/99 10:32:40
                                Edit Calendar File
Calendar Date  91799

Type options, press Enter.

? Calendar  Day   Prod.   Day Wk Pd Q  Yr  EOD   EOW   EOP   EOY
   Date      Date      (Y/N) (Y/N) (Y/N) (Y/N)
9/17/99  FRI   9/17/99  5  37  9  3  99
9/18/99  SAT   9/18/99  5  37  9  3  99
9/19/99  SUN   9/19/99  5  37  9  3  99
9/20/99  MON   9/20/99  1  38  9  3  99
9/21/99  TUE   9/21/99  2  38  9  3  99
9/22/99  WED   9/22/99  3  38  9  3  99  Y
9/23/99  THU   9/23/99  4  38  9  3  99  Y
9/24/99  FRI   9/24/99  5  38  9  3  99  Y  Y
9/25/99  SAT   9/25/99  5  38  9  3  99
9/26/99  SUN   9/26/99  5  38  9  3  99
9/27/99  MON   9/27/99  1  39  9  4  99  Y
+

F3=Exit
```

2. Review the following fields of each calendar record to verify that each is accurate. Contact CDR support personnel if any value is questionable:

- **Prod. Date (6,n)** - designates the closing date which will be used when executing the closing procedures for the calendar date.
- **Day (2,n)** - designates the day of the week, such as *1* for 1st day and *7* for 7th day, for the calendar date.
- **Wk (2,n)** - designates the week of the year, such as *1* for 1st week and *52* for 52nd week, for the calendar date.

- **Pd (2,n)** - designates the month of the year, such as *1* for 1st month and *12* for 12th month, for the calendar date. Note: If end of month (EOM) processing is executed on any day *other than* the last day of the month, the value of the **Pd** field must be incremented by one (1) for the days of the month following the last production date of that month. For example, if the EOM processing will on executed Friday, September 24, 1999, the value of the **Pd** field must be changed from *9* to *10* for September 25 through September 30.
- **Q (2,n)** - designates the quarter of the year, such as *1* for 1st quarter and *4* for 4th quarter, for the calendar date.
- **Yr (6,n)** - designates the year for the calendar date.

3. Edit the value of the following fields of each calendar record as necessary:
  - **EOD (1,a)** - enter *Y* to designate that end of day processing should be executed for the calendar date.
  - **EOW (1,a)** - enter *Y* to designate that end of week processing should be executed for the calendar date.
  - **EOP (1,a)** - enter *Y* to designate that end of month processing should be executed for the calendar date.
  - **EOY (1,a)** - enter *Y* to designate that end of year processing should be executed for the calendar date.

As illustrated in the screen above, values are automatically entered when DAC generates calendar records, but only for the current date and beyond.

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

```

BSPGFEFR    CHANGE    Creative Data Research                      9/22/99 10:58:41
                                Edit Calendar File
Calendar Date  91799
Type options, press Enter.

? Calendar  Day  Prod.  Day Wk Pd  Q  Yr  EOD  EOW  EOP  EOY
   Date      Date      Date  Wk Pd  Q  Yr  (Y/N) (Y/N) (Y/N) (Y/N)
9/17/99  FRI  9/17/99  5  37  9  3  99
9/18/99  SAT  9/18/99  5  37  9  3  99
9/19/99  SUN  9/19/99  5  37  9  3  99
9/20/99  MON  9/20/99  1  38  9  3  99
9/21/99  TUE  9/21/99  2  38  9  3  99
9/22/99  WED  9/22/99  3  38  9  3  99  Y
9/23/99  THU  9/23/99  4  38  9  3  99  Y
9/24/99  FRI  9/24/99  5  38  9  3  99  Y      Y      Y
9/25/99  SAT  9/25/99  5  38 10  3  99
9/26/99  SUN  9/26/99  5  38 10  3  99
9/27/99  MON  9/27/99  1  39 10  4  99  Y
F3=Exit
CONFIRM: Y (Y/N)
  
```

5. Press <Enter> when prompted to confirm.
6. Press <F3> to exit. The System Options screen appears.

Note: *Before executing end of day processing the first time*, users must verify that the value of the **Date No. 1** field of the Closing Control Key Record for Current is correct. If the current date is not displayed for the **Date No. 1** field, contact CDR support personnel. Refer to Working With Closing Control Display of the DAC

Closing Procedures document for information about using option 2 (Closing Control Display) of the Systems Option screen to check the **Date No. 1** field.

Refer to the previous section for an example of the Closing Control Key Record for Current.

# Deleting Records

The Deletions application is used to delete the following qualified records:

- Customer - refer to the Customer File Maintenance document for additional information.
- Item - refer to the Item File Maintenance document for additional information.
- Buying allowance
- Analysis
- Tax - refer to the Item File Maintenance document for additional information.
- Salesman Promotion
- Selling Allowance
- Inventory history

The Deletion application is also used to delete the price contract records, the retail contract records and the weekly analysis records created for the customers that have since been deleted. Other records, such as selling allowance records, are deleted by using <F11> (Delete) when the record is displayed, or entering *D* (Delete request) in the selection column of a record list.

```
User: JEANNINE          Menu: FMCV1          Date: 8/10/12

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

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

By selecting option 19 (Deletions) from the File Maintenance screen, the Deletion Menu screen appears.



```

User: JEANNINE          Menu: DLTCV1          Date: 8/26/05

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

```

## Deleting Buying Allowance Records

A buying allowance record is qualified for deletion if the deal expires before or on the deletion date. Refer to Working With Buying Allowances of the Purchasing document for information about the **Last Ship Date** field of the buying allowance record.

1. Select option 3 (Delete Qualified Buying Allowances) from the Deletion Menu screen. The Prompt For Delete Date screen appear.

```

DSUSPVR  ENTER  Creative Data Research          8/26/05  9:10:05
                        Prompt For Delete Date

All Records with End Date Less Than or Equal to Ending Date will be Deleted!

                        Warehouse 1      MAIN WAREHOUSE

                        Ending date

F3=Exit  F10=Drop All Qualified Record

```

2. Enter a warehouse code for the **Warehouse** field (6,a).
3. Enter a date for the **Ending date** field (6,n).
3. Press <F10> (Drop All Qualified Record).
4. Press F3 to exit the program.

---

## Deleting Analysis Records

An analysis record is qualified for deletion when it is over a year old. For example, analysis records created in 1997 are qualified for deletion in 1999, but analysis records created in 1998 are not qualified for deletion in 1999.

1. Select option 4 (Delete Qualified Analysis Records) from the Deletion Menu screen. The Delete Analysis Records screen appears.

```
GSLQPVVR  ENTER  Creative Data Research      8/26/05  9:18:48
                        Delete Analysis Records

Type choices, press Enter.

      All Records with a year of 2003 or less will be Deleted.

F3=Exit  F11=Delete Qualified Records
```

2. Press <F11> (Delete Qualified Records).
3. Press <Enter> when prompted to confirm.

---

## Deleting Promo Records

Salesman promotion records and selling allowance records are qualified for deletion if the deal expires before or on the deletion date. Refer to Working With Buying Allowances of the Purchasing document for information about the **Last Ship Date** field of the buying allowance record.

1. Select option 6 (Delete Qualified Promo Records) from the Deletion Menu screen. The Delete Special Item Tracking Records screen appears.

```
BSULPVVR  ENTER  Creative Data Research      8/26/05  9:20:35
                        Delete Item Special Tracking Records

                        Input Date

Any Records That Have An Expired Date Less Than The Date Entered Will Be
                        D E L E T E D  ||||

F3=Exit  F11=Delete Qualified Records
```

2. Enter a date for the **Input Date** field (6,n).
3. Press <F11> (Delete Qualified Records).
4. Press <F3> to exit.

---

## Deleting Inventory History Records

Inventory history records are qualified for deletion if the records are dated before the first day of the current year.

1. Select option 7 (Delete Qualified Inventory History Records) from the Deletion Menu screen. The Prompt for Purge screen appears.

```

GSLTPVR  ENTER  Creative Data Research      8/26/05  9:21:17
                Prompt for Purge of I/C Detail History File

Warehouse . . . . 1      MAIN WAREHOUSE

If You Continue All Records Before 10105 Will Be Deleted!

F3=Exit  F11=Delete Qualified Records

```

2. Enter a warehouse code for the **Warehouse** field (6,a).
3. Press <F11> (Delete Qualified Records).
4. Press <Enter> when prompted to confirm.

---

## Reorganizing History Files

After using any of the previously described deletion applications, users should select option 8 (Reorganize Above History Files) to compress system disk space.

```

User: JEANNINE      Menu: DLTCV1      Date: 8/26/05

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

```

---

## Deleting Price Contract Records of Deleted Customers

Option 9 (Expire Deleted Customer Price Contracts) is selected from the Deletion Menu screen to delete price contract records that were created for customers that have been deleted from the system.

```
User: JEANNINE          Menu: DLTCV1          Date: 8/26/05

===== > D E L E T I O N   M E N U <=====
=====
|||||      1. Delete Qualified Customers
THE  ||      2. Delete Qualified Items
DAC  ||      3. Delete Qualified Buying Allowances
SYSTEM ||      4. Delete Qualified Analysis Records
|||||      5. Delete Qualified Tax Records
|||||      6. Delete Qualified Promo Records
|||||      7. Delete Qualified Inventory History Records
|||||      8. Reorganize Above History Files
|||||      9. Expire Deleted Customer Price Contracts
|||||     10. Expire Deleted Customer Retail Contracts
|||||     11. Delete Qualified Customer Weekly Analysis Rcds.
|||||      M E N U   C A L L S
19.
20.
21.
22. File Maintenance    23. Dac Main Menu    90. Sign Off
=====
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==>
Job 197644/JEANNINE/JPENJOBS submitted to job queue QBATCH in library QGPL.
```

---

## Deleting Retail Contract Records of Deleted Customers

Option 10 (Expire Deleted Customer Retail Contracts) is selected from the Deletion Menu screen to delete retail contract records that were created for customers that have been deleted from the system.

```
User: JEANNINE          Menu: DLTCV1          Date: 8/26/05

===== > D E L E T I O N   M E N U <=====
=====
|||||      1. Delete Qualified Customers
THE  ||      2. Delete Qualified Items
DAC  ||      3. Delete Qualified Buying Allowances
SYSTEM ||      4. Delete Qualified Analysis Records
|||||      5. Delete Qualified Tax Records
|||||      6. Delete Qualified Promo Records
|||||      7. Delete Qualified Inventory History Records
|||||      8. Reorganize Above History Files
|||||      9. Expire Deleted Customer Price Contracts
|||||     10. Expire Deleted Customer Retail Contracts
|||||     11. Delete Qualified Customer Weekly Analysis Rcds.
|||||      M E N U   C A L L S
19.
20.
21.
22. File Maintenance    23. Dac Main Menu    90. Sign Off
=====
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==>
Job 197645/JEANNINE/JPENJOBS submitted to job queue QBATCH in library QGPL.
```

## Deleting Weekly Analysis Records of Deleted Customers

Option 11 (Delete Qualified Customer Weekly Analysis Rcds) is selected from the Deletion Menu screen to delete weekly analysis records that were created for customers that have been deleted from the system.

```
User: JEANNINE          Menu: DLTCV1          Date: 8/26/05

===== > D E L E T I O N   M E N U <=====
|||||
THE  ||      1. Delete Qualified Customers
DAC  ||      2. Delete Qualified Items
SYSTEM ||    3. Delete Qualified Buying Allowances
|||||      4. Delete Qualified Analysis Records
              5. Delete Qualified Tax Records
              6. Delete Qualified Promo Records
              7. Delete Qualified Inventory History Records
              8. Reorganize Above History Files
              9. Expire Deleted Customer Price Contracts
             10. Expire Deleted Customer Retail Contracts
             11. Delete Qualified Customer Weekly Analysis Rcds.
                M E N U   C A L L S
19.          20.          21.
22. File Maintenance  23. Dac Main Menu  90. Sign Off
=====
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==>
Job 197646/JEANNINE/JPENJOBS submitted to job queue QBATCH in library QGPL.
```