

DAC

User Guide

Pre-book Orders

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Working With Pre-book Orders

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

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

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

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

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

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

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

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

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

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

the SYS015 (General System Options) default system option.

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

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

Working With Export Options

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

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

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

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

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

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

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

```

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

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

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

```

CVKGDFFR  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.

```

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

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

```

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

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

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

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

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

Working With Individual Pre-book Orders

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

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

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

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

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

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

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

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

Adding Pre-book Orders

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

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

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

```
User: JEANNINE          Menu: OTHCV1          Date: 8/19/08

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

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

```
User: JEANNINE          Menu: PREBKCV1          Date: 8/19/08

===== > 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 ||
||||| 4. Print Pre-Book Orders
      5. Print Pre-Book Orders by Customer
      6. Pre-Book Report Menu
      7. Work with Pre-Book Defaults
      8. Create Pre-Book Orders from Defaults
      9. Release Pre-Book Orders
      M E N U   C A L L S
19. Billing      20. Billing Files Maint.  21. Billing Reports
22. Remote Orders  23. Dac Main Menu      90. Sign Off
=====
COPYRIGHT @1992-2007@ Creative Data Research, Inc.
Selection or command
==>
```

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

```

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

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

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

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

```

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

```

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

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

F3=Exit  F4=Prompt

```

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

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

CVKHPVR	ENTER	Creative Data Research, Inc.	8/19/08 17:10:09
		Prompt Pre-book Order CRT	
Customer Number	320055	OCEAN SPRINGS QUICK STOP	
Ship Date	100108		
Create using saved defaults?	(Y/N)		
F3=Exit F4=Prompt		CONFIRM: Y (Y/N)	

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

CVVKE1R	CHANGE	Creative Data Research, Inc.	8/19/08 17:17:50
		Edit Pre-Book Order Hdr Details	
Pre-Book Order Number	85		
Customer Number . . .	320055	OCEAN SPRINGS QUICK STOP	
Status 1 Open		Creation Date 8/19/08	Creation Time 17:17:50
Defaults for new detail lines:			
Ship Date	100108		
Warehouse Code . . .	1	MAIN WAREHOUSE	
Deal Utilization . .	S	(S=Standard, T=Show, X=None)	
Deal Number			
User Code #1			
User Code #2			
Special Message 1 .			
Special Message 2 .			
Special Message 3 .			
F3=Cancel & Exit F4=Search F9=Save as Default Enter=Update & Exit			

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

- 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.
- 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.
- If *S* or *T* is entered for the **Deal Utilization** field, enter the vendor deal number for the **Deal Number** (6,n) field. Users may press <F4> to select the deal number from the Select Deal For Pre-book Order screen.

CVVKE1R	CHANGE	Creative Data Research, Inc.	8/19/08 17:21:2
Edit Pre-Book Order Hdr Details			
Pre-Book Order Number		85	
Customer Number . . .		320055 OCEAN SPRINGS QUICK STOP	
Status 1 Open		Creation Date 8/19/08 Creation Time 17:17:50	
Defaults for new detail lines:			
Ship Date	100108		
Warehouse Code . . .	1	MAIN WAREHOUSE	
Deal Utilization . .	S (S=Standard, T=Show, X=None)		
Deal Number	21	Keebler Standard Booking	
User Code #1			
User Code #2			
Special Message 1 .	Keebler Standard Booking		
Special Message 2 .			
Special Message 3 .			
F3=Cancel & Exit F4=Search F9=Save as Default Enter=Update & Exit			

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

12. Enter data as necessary for the following fields:

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

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

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

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

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

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

```

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

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

```

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

```

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

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

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

```

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

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

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

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

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

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

Using Work With Pre-book Orders To Export

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

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

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

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

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

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

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

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

```

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

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

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

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

```

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

```

CVMHPVR      ENTER Creative Data Research, Inc.      4/22/09 10:46:35
                                Pre-book Global Tools

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

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

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

```

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

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

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

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

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

```

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

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

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

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

```

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>.

```

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

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

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

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

```

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

```

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

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

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

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

```

```

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

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

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

```

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

```

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

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

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

```

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

```

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

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

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

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

```

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

CVKRDFR	DISPLAY Creative Data Research, Inc.	4/22/09 12:36:05
	Prompt for Export	
Position to Customer		
Position to Order #		
-----		U=Unselect
Customer / Count / Route		
Order Line Item Qty Description Date		
JR FOOD MART - ABITA / 1 Lines / 210		
8 2 439394 2 HERSHEY KISSES 12 OZ		2009-04-22
BIG JOHN'S QUICK STOP #1 / 1 Lines /		
7 2 439394 2 HERSHEY KISSES 12 OZ		2009-04-22
BIG P MINI MART / 1 Lines / 500		
9 2 439394 2 HERSHEY KISSES 12 OZ		2009-04-22
DANNY & CLYDE'S FOOD STORE #20 / 1 Lines / 400		
10 2 439394 2 HERSHEY KISSES 12 OZ		2009-04-22
F2=Glb Tools F3=Exit F4=Search F5=Refresh F6=Print F7=Options F10=Export		

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

Print Pre-book Orders

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

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

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

Using Work With Pre-book Items To Export

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

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

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

```
User: JEANNINE          Menu: OTHCV1          Date: 7/23/08

===== > O T H E R   O P E R A T I O N S <=====
=====
|||||
THE  ||
DAC  ||
SYSTEM ||
|||||

1. Archive Functions
2. Unitrac (PMSTARS Etc.)
3. QDN Interface
4. E-Mail
5. Pre-Booked Order System
6. Fast Track Reporting
7. Hershey Reporting
8. DEA Allocation
9. PERCS Reporting
10. NTS/Victory Reporting
11. Red Bull Reporting
MENU CALLS

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

=====
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==>
```

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

```
User: JEANNINE          Menu: PREBKCV1          Date: 7/23/08

===== > P R E - B O O K   O R D E R S <=====
=====
|||||
THE  ||
DAC  ||
SYSTEM ||
|||||

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
MENU CALLS

19. Billing
22. Remote Orders
20. Billing Files Maint.
23. Dac Main Menu
21. Billing Reports
90. Sign Off

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

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

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

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

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

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

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

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

CVL2DFR		DISPLAY Creative Data Research, Inc.		8/14/08 13:43:49			
Work with Pre-book Items							
Position to Item							
Limit to Warehouse		Limit to Pre-book#					
Limit to Vendor							
Limit to Deal Number							
Limit to Deal Utilization						(S=Standard, T=Show, X=None, Blank=Any)	
Limit to Date Range: . . . From		To					
Limit to User Code #1		User Code #2		Include Exported? Y (Y/N)			
S=Select All U=Unselect All A=Select Available 5=Details							
? Item	Description	Total Demanded	Total Selected	Total Avail	On Order		
113200	MARLBORO 100 BOX	10.00	.00	201	0		
439336	HERSHEY PLAIN GIANT BAR	80.00	.00	32	0		
561158	KEEBLER CHIPS DELUXE 20Z	4.00	.00	1242	0		
631127	KEEBLER FUDGE STRIPE COOKIES 11.50	80.00	.00	5	0		
770130	BLACKJACK FULL FLAVOR 16OZ	52.00	.00	3886	0		
802662	BIC LIGHTER MINI CLASSIC 3PK	.00	.00	1313	0		
802680	BIC LIGHTER COMFORT LITE	16.00	.00	1710	+		
F2=Global Tools F3=Exit F5=Refresh F8=Export							

Exporting All The Orders Of A Pre-booked Item

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

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

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

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

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

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

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

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

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

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

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

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

```

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

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

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

561158 KEEBLER CHIPS DELUXE 20Z          18.00      18.00    1288      0
631127 KEEBLER FUDGE STRIPE COOKIES 11.50  100.00      .00      55      0

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

```

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

```

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

Position to Customer
Position to Order #

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

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

```

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

Print Pre-book Orders

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

- If necessary, press <F7> (Options) to review or change the export options. Refer to Working With Export Options above for additional information.
- 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 Utilization	(S=Standard, T=Show, X=None, Blank=Any)	
Limit to Date Range: From	To	
Limit to User Code #1	User Code #2	Include Exported? N (Y/N)
S=Select All U=Unselect All A=Select Available 5=Details		
? Item	Description	Total
		Demanded
		Selected
		Total
		Avail
		On
		Order
113200	MARLBORO 100 BOX	10.00
439336	HERSHEY PLAIN GIANT BAR	210.00
631127	KEEBLER FUDGE STRIPE COOKIES	11.50
		100.00
		.00
		.00
		251
		192
		55
		0
		0
		0
F2=Global Tools F3=Exit F5=Refresh F8=Export		
2 orders created as a result of export.		

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

Exporting Orders For Individual Customers

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

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

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

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

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

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

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

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

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

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

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

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

```

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

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

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

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

```

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

```

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

Item 439394 HERSHEY KISSES 12 OZ Deal Type:

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

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

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

```

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

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

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

```

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

Item 439394 HERSHEY KISSES 12 OZ                                Deal Type:

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

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

? Ship Order / Line Customer                                Qty U/M
Date
* 42209      7      2 BIG JOHN'S QUICK STOP #1              2  2 CSE
* 42209      8      2 JR FOOD MART - ABITA                  2  2 CSE
* 42209      9      2 BIG P MINI MART                        2  2 CSE
* 42209     10      2 DANNY & CLYDE'S FOOD STORE #20         2  2 CSE

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

```

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

```

CVL2DFFR    DISPLAY Creative Data Research, Inc.                4/22/09 14:03:11
                                Work with Pre-book Items

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

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

439394 HERSHEY KISSES 12 OZ                        8.00      8.00    114      0

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

```

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

```

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

Position to Customer
Position to Order #
----- U=Unselect

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

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

```


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

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

Print Pre-book Orders

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

Exporting The Orders Of Available Pre-booked Items

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

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

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

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

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

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

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

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

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

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

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

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

```

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

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

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

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

```

4. Press <Enter>.

```

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

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

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

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

```

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

```

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

Item 439336 HERSHEY PLAIN GIANT BAR Deal Type:

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

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

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

```

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

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

```

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

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

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

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

```

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

```

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

Position to Customer
Position to Order #
----- U=Unselect

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

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

```

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

Print Pre-book Orders

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

11. If necessary, press <F7> (Options) to review or change the export options. Refer to Working With Export Options above for additional information.

12. Press <F10> (Export) to export the pre-book orders as new *Pick* type customer orders. The Work With Pre-book Items screen appears.

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

Working With Pre-book Order Creation Defaults

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

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

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

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

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

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

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

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

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

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

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

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.

```

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

      Ord / Line Item      Qty U/M      Price      Extension
      Ship Date 100108 KEEBLER PECAN SANDIES 2 OZ      13.65      54.60
      85      3 631127      4 2 BAG      15.45      61.80
      Ship Date 100108 KEEBLER FUDGE STRIPE COOKIES 11.5OZ
      85      2 561759      4 2 BOX      11.30      45.20
      Ship Date 100108 KEEBLER CLUB CRACKER 5.25 OZ
      85      1 561158      10 2 CTN      3.45      34.50
      Ship Date 100108 KEEBLER CHIPS DELUXE 20Z

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.

```

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

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

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

Defaults for new detail lines:

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

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

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

```

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.

CVVKE1R	CHANGE	Creative Data Research, Inc.	8/20/08 11:18:07
Edit Pre-Book Order Hdr Details			
Pre-Book Order Number		85	
Customer Number . . .		320055 OCEAN SPRINGS QUICK STOP	
Status 1 Open		Creation Date 8/19/08 Creation Time 17:17:50	
Defaults for new detail lines:			
Ship Date		090208	
Warehouse Code . . .		1 MAIN WAREHOUSE	
Deal Utilization . .		S (S=Standard, T=Show, X=None)	
Deal Number		21 Keebler Standard Booking	
User Code #1 . . .			
User Code #2 . . .			
Special Message 1 .		Keebler Standard Booking	
Special Message 2 .			
Special Message 3 .			
F3=Cancel & Exit F4=Search F9=Save as Default Enter=Update & Exit			

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

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

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

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

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

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

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

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

Editing Pre-book Orders and Pending Items

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

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

Adding Items To A Pre-book Order

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

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

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

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

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

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

? Ship Dte      Cust                                Pbk      Code Code Pbk#
              Order#      #1  #2
9/30/08  770001 TEXAS TRUCK STOP                      32                2014
9/30/08  700180 L & M GROCERY                          42                2014
9/30/08  99000 99 MART PLUS                             57
9/30/08  380120 MISS STOP N GO #120                   59
9/25/08  800333 KINGS FOREST EXXON                     43                2014
9/20/08  380120 MISS STOP N GO #120                   35                2014
9/15/08  380110 MISS STOP N GO #110                   34                2014
9/15/08  380130 MISS STOP N GO #130                   36                2014
9/13/08  320033 KINGS GROCERY                          44                2014
9/12/08  320033 KINGS GROCERY                          40                20 +

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

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

```

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

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

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

```

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

```

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

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

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

```

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

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

CVVLDFR	DISPLAY	Creative Data Research, Inc.	8/15/08 16:45:50
Edit Pre-Book Order: DTE			
Customer	700180 L & M GROCERY		
Position	Ship Date-->	Limit Item-->	Limit Order#--> 29

Item	Qty	U/M	Pending 4 Exported 0 SHOW ALL
S=Select/Unselect	D=Delete	2=Edit Line	Properties M=Message

Ord / Line	Item	Qty U/M	Price Extension
29 4	113200	10 2 CTN	29.46 294.60
Ship Date	81808	MARLBORO 100 BOX	
29 3	631127	10 2 BAG	15.45 154.50
Ship Date	81808	KEEBLER FUDGE STRIPE COOKIES 11.5OZ	
29 2	802680	2 2 EA	16.88 33.76
Ship Date	81808	BIC LIGHTER COMFORT LITE	
29 1	439336	10 2 BOX	38.40 384.00
Ship Date	81808	HERSHEY PLAIN GIANT BAR	
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr			

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

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

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

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

CVVLDFR	DISPLAY	Creative Data Research, Inc.	8/15/08 16:47:41
Edit Pre-Book Order: DTE			
Customer	700180 L & M GROCERY		
Position	Ship Date-->	Limit Item-->	Limit Order#--> 29

Item	Qty	U/M	Pending 5 Exported 0 SHOW ALL
S=Select/Unselect	D=Delete	2=Edit Line	Properties M=Message

Ord / Line	Item	Qty U/M	Price Extension
29 5	902400	10 2 EA	.63 6.30
Ship Date	81808	BIC CLASSIC MED BLACK 2PK	
29 4	113200	10 2 CTN	29.46 294.60
Ship Date	81808	MARLBORO 100 BOX	
29 3	631127	10 2 BAG	15.45 154.50
Ship Date	81808	KEEBLER FUDGE STRIPE COOKIES 11.5OZ	
29 2	802680	2 2 EA	16.88 33.76
Ship Date	81808	BIC LIGHTER COMFORT LITE	
29 1	439336	10 2 BOX	38.40 384.00
Ship Date	81808	HERSHEY PLAIN GIANT BAR	
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr			

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

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

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

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

Deleting Items From A Pre-book Order

```

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

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

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

=====
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Selection or command
==>

```

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

```

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

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

? Ship Dte      Cust                                Pbk      Code Code Pbk#
Order#          Order#          #1      #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
8/02/08    770001 TEXAS TRUCK STOP                            32                2014
8/01/08    320092 LIL SHORT STOP - OCEAN SPRINGS                28
8/01/08    700180 L & M GROCERY                                29
8/01/08    100802 CRANKY CORNER QUICK STOP                    38                2014
8/01/08    100855 GAS-N-SHOP #6                               39                20 +

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

```

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

```

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

      Ord / Line Item      Qty U/M      Price      Extension
      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 MINIATURES 12 OZ
      58      3 631127 10 2 BAG      15.45      154.50
Ship Date 80808 KEEBLER FUDGE STRIPE COOKIES 11.5OZ
      58      5 902400 2 2 EA      .63      1.26
Ship Date 81408 BIC CLASSIC MED BLACK 2PK
      58      2 802680 2 2 EA      16.88      33.76
Ship Date 83008 BIC LIGHTER COMFORT LITE

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

```

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.

```

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

      Ord / Line Item      Qty U/M      Price      Extension
D      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 MINIATURES 12 OZ
      58      3 631127 10 2 BAG      15.45      154.50
Ship Date 80808 KEEBLER FUDGE STRIPE COOKIES 11.5OZ
      58      5 902400 2 2 EA      .63      1.26
Ship Date 81408 BIC CLASSIC MED BLACK 2PK
      58      2 802680 2 2 EA      16.88      33.76
Ship Date 83008 BIC LIGHTER COMFORT LITE

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

```

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.

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

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

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

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

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

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

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

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

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

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


```

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

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

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

```

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

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

```

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

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

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

```

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

```

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

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

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

Defaults for new detail lines:

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

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

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

```

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

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

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

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

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

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

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

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

Changing A Pending Item's Ship Date

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

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

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

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

M E N U   C A L L S
19. Billing          20. Billing Files Maint.  21. Billing Reports
22. Remote Orders   23. Dac Main Menu        90. Sign Off
=====
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 with a list of all pending items.

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

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

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

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

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

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

CVL2DFR	DISPLAY Creative Data Research, Inc.	8/07/08 16:19:50
Work with Pre-book Items		
Position to Item	631127 KEEBLER FUDGE STRIPE COOKIES 11.50Z	
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
		Demanded
		Selected
		Total Avail
		On Order
631127	KEEBLER FUDGE STRIPE COOKIES 11.50	90.00
		.00
		15
		0
770130	BLACKJACK FULL FLAVOR 160Z	44.00
		.00
		3886
		0
802662	BIC LIGHTER MINI CLASSIC 3PK	1.00
		.00
		1313
		0
802680	BIC LIGHTER COMFORT LITE	18.00
		.00
		1714
		0
902400	BIC CLASSIC MED BLACK 2PK	16.00
		.00
		0
		0
F2=Global Tools F3=Exit F5=Refresh F8=Export		

- 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.

CVKVDPR	DISPLAY Creative Data Research, Inc.	8/07/08 16:22:30
Pre-book Demand for Item		
Item 631127 KEEBLER FUDGE STRIPE COOKIES 11.50Z	Deal Type:	
Position to Ship Date	Limit to Pre-book#	
Limit to Customer .		
Limit to User Code#1		
Type options, press Enter.		
2=Edit Line	S=Select/Unselect for Export	
? Ship	Order / Line	Customer
		Qty U/M
Date		
73008	50	3 USA CONVENIENCE STORE #200
		10 2 BAG
73008	51	3 USA CONVENIENCE STORE #300
		10 2 BAG
73008	52	3 USA CONVENIENCE STORE #400
		10 2 BAG
73008	53	3 USA CONVENIENCE STORE #500
		10 2 BAG
73008	54	3 USA CONVENIENCE STORE #600
		10 2 BAG
80108	29	3 L & M GROCERY
		10 2 BAG
80108	59	3 MISS STOP N GO #120
		10 2 BAG
80108	60	3 MISS STOP N GO #130
		10 2 BAG +
F2=Global Tools F3=Exit F4=Search F5=Reload F6=Access Date F8=Export		

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

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

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

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

```

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

Type changes, press Enter.

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

Unit Price . :      15.45
Extension . :      154.50

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

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

```

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

```

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

Item 631127 KEEBLER FUDGE STRIPE COOKIES 11.50Z      Deal Type:

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

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

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

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

```

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

```

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

Item 631127 KEEBLER FUDGE STRIPE COOKIES 11.50Z      Deal Type:

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

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

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

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

```

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

Changing The Ship Date Of All An Order's Items

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

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

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

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

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

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

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

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

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

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

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

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

```

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

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

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

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

```

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

```

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

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

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

```

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

```

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

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

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

Defaults for new detail lines:

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

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

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

```

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


```

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

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

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

Defaults for new detail lines:

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

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

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

```

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

```

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

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

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

```

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

```

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

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

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

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

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

```

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

CVKGDFFR	DISPLAY	Creative Data Research, Inc.	8/15/08 13:25:25
Work with Pre-Book Orders			
Pre-book	Pre-book#	Pre-book	Cust#
Ship Date	Order No.	Vendor Deal#	W.H. Deal Code Code
		Code Utilz	#1 #2
OPEN			
2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available			
R=Reset Dates			
? Ship Dte	Cust	Pbk	Code Code Pbk#
		Order#	#1 #2
R 8/18/08	700180 L & M GROCERY	29	
8/11/08	100850 EXPRESS WAY FOOD MART	65	
8/03/08	100850 EXPRESS WAY FOOD MART	33	2014
8/03/08	380110 MISS STOP N GO #110	34	2014
8/03/08	380120 MISS STOP N GO #120	35	2014
8/03/08	380130 MISS STOP N GO #130	36	2014
8/03/08	99000 99 MART PLUS	57	
8/02/08	770001 TEXAS TRUCK STOP	32	2014
8/01/08	100802 CRANKY CORNER QUICK STOP	38	2014
8/01/08	100855 GAS-N-SHOP #6	39	20 +
F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create			

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

CVKGDFFR	DISPLAY	Creative Data Research, Inc.	8/15/08 13:50:30
Work with Pre-Book Orders			
Pre-book	Pre-book#	Pre-book	Cust#
Ship Date	Order No.	Vendor Deal#	W.H. Deal Code Code
		Code Utilz	#1 #2
OPEN			
2=Edit 9=Cancel C=Copy S=Select U=Unselect A=Select Available			
R=Reset Dates			
? Ship Dte	Cust	Pbk	Code Code Pbk#
		Order#	#1 #2
8/18/08	700180 L & M GROCERY	29	
8/11/08	100850 EXPRESS WAY FOOD MART	65	
8/03/08	100850 EXPRESS WAY FOOD MART	33	2014
8/03/08	380110 MISS STOP N GO #110	34	2014
8/03/08	380120 MISS STOP N GO #120	35	2014
8/03/08	380130 MISS STOP N GO #130	36	2014
8/03/08	99000 99 MART PLUS	57	
8/02/08	770001 TEXAS TRUCK STOP	32	2014
8/01/08	100802 CRANKY CORNER QUICK STOP	38	2014
8/01/08	100855 GAS-N-SHOP #6	39	20 +
F2=Global Tools F3=Exit F5=Refresh F7=All F8=Export F10=Create			
Date reset completed.			

The *Date reset completed* message appears.

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

Changing Quantity and U/M Of A Pending Item

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

```
User: JEANNINE          Menu: PREBKCV1          Date: 8/18/08

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

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

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

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

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

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

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

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

113200 MARLBORO 100 BOX          10.00      .00      201      0
439336 HERSHEY PLAIN GIANT BAR   80.00      .00      32       0
561158 KEEBLER CHIPS DELUXE 2OZ  4.00      .00     1242     0
631127 KEEBLER FUDGE STRIPE COOKIES 11.50  80.00      .00      5       0
770130 BLACKJACK FULL FLAVOR 16OZ  56.00      .00     3886     0
802680 BIC LIGHTER COMFORT LITE   16.00      .00     1710     0
902026 BIC RED CRYSTAL          14.00      .00      657     +

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

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

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

```

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

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

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

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

```

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

```

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

Item 802680 BIC LIGHTER COMFORT LITE Deal Type:

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

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

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

```

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

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

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

```

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

Item 802680 BIC LIGHTER COMFORT LITE                      Deal Type:

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

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

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

```

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

```

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

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

Type changes, press Enter.

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

Unit Price . .      16.88
Extension . .      33.76

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

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

```

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

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

Overriding A Pending Item's Price

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

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

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

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

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

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

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

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

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

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

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

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

```

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

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

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

```

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

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

```

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

      Ord / Line Item      Qty U/M      Price      Extension
      99      1 561158      1 2 CTN      3.15      3.15
Ship Date 82108 KEEBLER CHIPS DELUXE 20Z

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

```

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

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

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


```

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

Type changes, press Enter.

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

Unit Price . :      3.15
Extension . :      3.15

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

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

```

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

```

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

Type changes, press Enter.

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

Unit Price . :      3.50
Extension . :      3.50

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

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

```

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

CVVLDFR	DISPLAY Creative Data Research, Inc.				8/21/08 15:56:51	
Edit Pre-Book Order: DTE						
Customer	700180 L & M GROCERY					
Position	Ship Date-->	Limit Item-->	Limit Order#-->		99	

Item	Qty	U/M	Pending	1	Exported	0 SHOW PENDING
S=Select/Unselect	D=Delete	2=Edit Line Properties M=Message				
Ord / Line	Item	Qty	U/M	Price	Extension	
99 1	561158	1	2 CTN	3.50	<	3.50
Ship Date	82108	KEEBLER CHIPS DELUXE 2OZ				
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr						

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

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

Replacing Pending Items

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

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

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

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

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

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

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

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

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

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

```

CVMHPVR    ENTER    Creative Data Research, Inc.                8/15/08 15:08:17
                        Pre-book Global Tools

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

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

```

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

```

CVL2DFR    DISPLAY Creative Data Research, Inc.                8/15/08 15:11:42
                        Work with Pre-book Items

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

S=Select All  U=Unselect All  A=Select Available  5=Details
? Item Description                      Total    Total    Total    On
                                     Demanded Selected Avail Order
113200 MARLBORO 100 BOX                  10.00      .00    201      0
439336 HERSHEY PLAIN GIANT BAR           80.00      .00     32      0
561158 KEEBLER CHIPS DELUXE 20Z           4.00      .00   1242      0
631127 KEEBLER FUDGE STRIPE COOKIES 11.50 80.00      .00      5      0
770130 BLACKJACK FULL FLAVOR 16OZ        52.00      .00   3886      0
802680 BIC LIGHTER COMFORT LITE          16.00      .00   1710      0
902026 BIC RED CHRYSTAL                  14.00      .00    657      +

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

```

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

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

Copying Pre-book Orders

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

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

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

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

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

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

```

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

Type choices, press Enter.

Pre-Book Order Number      91

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


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

```

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

```

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

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

?
_ Customer: 320091 - LIL SHORT STOP - VANCLEVE


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

```

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

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

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

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

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

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

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

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

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

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

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

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

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

Working With Pre-book Defaults

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

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

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

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

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

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

Adding Pre-book Defaults

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

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

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

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

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

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

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

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

```

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

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

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

```

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

```

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

Pre-book #
Start Date
End Date
Description

F3=Exit

```

5. Enter data for the following fields:

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

GWNBVPVR	ENTER	CDR Customer Conference	10/12/09 13:31:53
Pre-book Header Entry			
Pre-book # 2000			
Start Date 100109			
End Date 123109			
Description			
Keebler Special			
F3=Exit			

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

GWN5DFR	DISPLAY	CDR Customer Conference	10/12/09 13:34:13
Enter Pre-Book Detail			
Prebook#	Item	Line	Deal#
2000			0
Type options, press Enter.			
2=Edit D=Delete C=Copy			
F3=Exit F4=Search			
No data to display.			

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

GWN6E1R	ADD	CDR Customer Conference	10/12/09 13:34:42
Enter/Update Pre-Book Dtl Details			
Prebook	2000	Line	1
Type changes, press Enter.			
Item	561158	KEEBLER CHIPS DELUXE 20Z	Vendor KEE001
Pick Region B1		Sell Price	Retail Price
Warehouse Location 3330		Items/Unit Retail	Cost Price
Promotion Dollar Amount	.		Dist.Incentive
Promotion Cost Dollar Amount			Salesrep Promo
Free Item Flag			
Default Quantity			
F3=Exit F5=Deal			

8. Enter an amount for one of the following fields to set the billing price for the item:
 - **Sell Price** - a fixed amount designated as the customer's billing price for the item at the standard selling level (unit of measure). This price overrides any existing contracts, selling allowances, rebates, discounts and surcharges.
 - **Promotion Dollar** - an amount deducted from the customer's billing price for the item at the standard selling level (unit of measure). This amount is deducted after other pricing factors (contracts, selling allowances, rebates, discounts and surcharges) are calculated.
9. If necessary, enter an amount for one of the following fields to affect the cost of the item:
 - **Cost Price** - a fixed amount designated as the item's base cost. This amount overrides any base cost designated by an existing contract and selling allowance.
 - **Promotion Cost Dollar Amount** - an amount deducted from the item's net cost and base cost.
10. If necessary, enter values for the following fields:
 - **Retail Price** - the retail price for the item's standard selling level.
 - **Items/Unit Retail** - the number of units included in the retail price if more than one, such as 3 for \$.99.
12. If necessary, enter the amount for the **Dist.Incentive** field which is tracked for rebate to the distributor for each item sold at the standard selling level (unit of measure).
13. Enter *Y* (yes) for the **Free Item Flag** field if the item is free to the retailer.
14. If necessary, enter a number for the **Default Quantity** field to 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.

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

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

```

GWN5DFR      DISPLAY CDR Customer Conference      10/12/09 13:39:03
                                Enter Pre-Book Detail

Prebook# Item   Line
2000                                           Deal#    35

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

F3=Exit F4=Search

```

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

```

GWN5DFR      DISPLAY CDR Customer Conference      10/12/09 14:04:29
                                Enter Pre-Book Detail

Prebook# Item   Line
2000                                           Deal#    35

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

                                Prebook Item Copy

                                To Item: 561161

                                F3=Exit F4=Search

F3=Exit F4=Search

```

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

Adding Pre-book Orders With Pre-book Defaults

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

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

```
User: JEANNINE          Menu: OTHCV1          Date: 10/19/09

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

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

```
User: JEANNINE          Menu: PREBKCV1          Date: 10/19/09

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

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

GWO0DFR DISPLAY CDR Customer Conference 10/19/09 10:35:1					
Prebook Order Creation					
Pre-book#	Ship Date	Pre-Book Order->			
Cust#		Total	0		
Item#	Qty	Code #1	Code #2	Items	0
Type options, press Enter.					

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

GWO0DFR DISPLAY CDR Customer Conference 10/19/09 10:35:55					
Prebook Order Creation					
Pre-book#	2000	Ship Date	102009	Pre-Book Order->	
Cust#		Total	10		
Item#	Qty	Code #1	Code #2	Items	1
Type options, press Enter.					
? Qty	Item#	Item Description		F	
	561158	KEEBLER CHIPS DELUXE 20Z			
10	561161	KEEBLER PECAN SANDIES 2 OZ			
F3=Exit F4=Search F5=View Orders Built F10=Create Order					

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

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

GWO0DFR DISPLAY CDR Customer Conference				10/19/09 10:44:36	
Prebook Order Creation					
Pre-book#	2000	Ship Date	102009	Pre-Book Order->	
Cust#	700180	L & M GROCERY		Total	10
Item#	Qty	Code #1	Code #2	Items	1
Type options, press Enter.					
? Qty	Item#	Item Description		F	
	561158	KEEBLER CHIPS DELUXE 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.

GWO0DFR DISPLAY CDR Customer Conference				10/19/09 10:45:1	
Prebook Order Creation					
Pre-book#	2000	Ship Date	102009	Pre-Book Order->	
Cust#	700180	L & M GROCERY		Total	16
Item#	Qty	Code #1	Code #2	Items	2
Type options, press Enter.					
? Qty	Item#	Item Description		F	
	8 561158	KEEBLER CHIPS DELUXE 20Z			
	8 561161	KEEBLER PECAN SANDIES 2 OZ			
F3=Exit F4=Search F5=View Orders Built F10=Create Order					

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

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

GWOODFR DISPLAY CDR Customer Conference				10/19/09 10:45:35	
Prebook Order Creation					
Pre-book#	2000	Ship Date	102009	Pre-Book Order->	22
Cust#				Total	16
Item#	Qty	Code #1	Code #2	Items	2
Type options, press Enter.					
? Qty	Item#	Item Description		F	
8	561158	KEEBLER CHIPS DELUXE 2OZ			
8	561161	KEEBLER PECAN SANDIES 2 OZ			
F3=Exit F4=Search F5=View Orders Built F10=Create Order					

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

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

Using Release Pre-books To Export Orders

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

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

```
User: JEANNINE          Menu: OTHCV1          Date: 10/19/09

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

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

```
User: JEANNINE          Menu: PREBKCV1          Date: 10/19/0

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

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

GWP1PVR	ENTER	CDR Customer Conference	10/19/09 11:46:26
		Release Pre-Books	
Q U A L I F Y:			
Pre-book Number			
Ship Date Range: From .		to	
Item			
Warehouse			
Vendor			
Deal #			
Customer			
Route Range: From .		to	Primary must be in range? (Y/N)
Deal Utilization		(S=Standard, T=Show, X=None, Blank=Any)	
Require pending order? .		(P=Primary Route, A=Any, Blank=Not Req.)	
F3=Exit F4=Search F10=Release			

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

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

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

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

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

GWPLPVR		ENTER	CDR Customer Conference		10/19/09 12:05:32
Release Pre-Books					
Q U A L I F Y:					
Pre-book Number	2000				
Keebler Special					
Ship Date Range: From .	101909 to 101909				
Item					
Warehouse					
Vendor					
Deal #					
Customer					
Route Range: From .		to		Primary must be in range? (Y/N)	
Deal Utilization	(S=Standard, T=Show, X=None, Blank=Any)				
Require pending order? .	(P=Primary Route, A=Any, Blank=Not Req.)				
F3=Exit F4=Search F10=Release					

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

CVKRDFR	DISPLAY CDR Customer Conference	10/19/09 12:15:19
Prompt for Export		
Position to Customer		
Position to Order #		

Customer / Count / Route		U=Unselect
Order	Line Item Qty Description	Date
DIANNE'S GROCERY / 2 Lines / 100		
19	1 561158 8 KEEBLER CHIPS DELUXE 20Z	2009-10-19
19	2 561161 8 KEEBLER PECAN SANDIES 2 OZ	2009-10-19
BOB'S SHELL / 2 Lines / 100		
20	1 561158 10 KEEBLER CHIPS DELUXE 20Z	2009-10-19
20	2 561161 10 KEEBLER PECAN SANDIES 2 OZ	2009-10-19
EXPRESS WAY FOOD MART / 1 Lines / 300		
21	1 561161 10 KEEBLER PECAN SANDIES 2 OZ	2009-10-19
F2=Glb Tools F3=Exit F4=Search F5=Refresh F6=Print F7=Options F10=Export		

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

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

Print Pre-book Orders

CDR Customer Conference		Print Pre-book Orders		JEANNINE	CVNCPFR	10/19/09 12:19:23	Page	1
Order # Customer		Ship Date Deal						
Line #	Item	Qty	Unit 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	
** END OF REPORT **								

Importing Pre-book Orders

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

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

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

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

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

Using Format A

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

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

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

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

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

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

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

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

```

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

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

```

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

```

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

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

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

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

```

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

```

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

CV1COM
Find -> _____ (Case-Sensitive)

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

F3=Exit

```

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

```

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

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

F3=Exit

```

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

```

Choose the Import Format

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

C=Cancel

Choice? A

F3=Exit

```

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

```

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

Type choices, press Enter.

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

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

F3=Exit  F4=Search

```

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

```

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

Type choices, press Enter.

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

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

F3=Exit   F4=Search

```

11. Enter data for the following fields as necessary:
 - **Deal Utilization** (1,a)
 - **Deal Number** (6,n)
 - **Special Message 1** (30,a)
 - **Special Message 2** (30,a)
 - **Special Message 3** (30,a)
 Refer to Adding Pre-book Orders for information about the fields above.
12. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The INFO screen appears with the total number of line items imported.

```

...

Invalid Customers:
00000
Accepted Line Items:
00010

INFO
----

F3=Exit

```


CVVLDFR	DISPLAY CDR Customer Conference		7/02/21 17:28:39																																											
Edit Pre-Book Order																																														
Customer	260501 BIG JOHN'S QUICK STOP #1																																													
Position	Ship Date-->	Limit Item-->	Limit Order#-->	518																																										

Item	Qty	U/M	Pending	3 Exported 0 SHOW PENDING																																										
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message																																														
<table border="1"> <thead> <tr> <th>Ord / Line</th> <th>Item</th> <th>Qty</th> <th>U/M</th> <th>Price</th> <th>Extension</th> </tr> </thead> <tbody> <tr> <td>518 2</td> <td>100003</td> <td>24</td> <td>2 CTN</td> <td>40.20</td> <td>964.80</td> </tr> <tr> <td>Ship Date _81221</td> <td>MARLBORO BLACK BOX 100</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>518 3</td> <td>100026</td> <td>24</td> <td>2 CTN</td> <td>40.20</td> <td>964.80</td> </tr> <tr> <td>Ship Date _82021</td> <td>MARLBORO BLACK MEN SPEC BLEND BX KS</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>518 1</td> <td>100002</td> <td>12</td> <td>2 CTN</td> <td>40.20</td> <td>482.40</td> </tr> <tr> <td>Ship Date _82421</td> <td>MARLBORO BLACK BOX K/S SOFTPACK</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>					Ord / Line	Item	Qty	U/M	Price	Extension	518 2	100003	24	2 CTN	40.20	964.80	Ship Date _81221	MARLBORO BLACK BOX 100					518 3	100026	24	2 CTN	40.20	964.80	Ship Date _82021	MARLBORO BLACK MEN SPEC BLEND BX KS					518 1	100002	12	2 CTN	40.20	482.40	Ship Date _82421	MARLBORO BLACK BOX K/S SOFTPACK				
Ord / Line	Item	Qty	U/M	Price	Extension																																									
518 2	100003	24	2 CTN	40.20	964.80																																									
Ship Date _81221	MARLBORO BLACK BOX 100																																													
518 3	100026	24	2 CTN	40.20	964.80																																									
Ship Date _82021	MARLBORO BLACK MEN SPEC BLEND BX KS																																													
518 1	100002	12	2 CTN	40.20	482.40																																									
Ship Date _82421	MARLBORO BLACK BOX K/S SOFTPACK																																													
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr																																														

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

Using Format B

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

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

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

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

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

```

GMNSDFR  DISPLAY CDR Customer Conference  6/30/21 11:48:13
Enter Pre-Book Detail
Prebook# Item Line Vendor
2021      _____ Deal# 152

Type options, press Enter.
2=Edit D=Delete C=Copy
? Item Description Promo$ Price Dist$ Slsmn$
_ 100005 MARLBORO BLEND BOX KING #27 .50 .000
_ 100001 MARLBORO BLEND BOX K/S SOFTPACK .50 .000
_ 100027 MARLBORO BLACK SPEC BLEND BOX 100 .50 .000
_ 100024 MARLBORO BLACK SPEC BLEND BOX KING .50 .000
_ 100004 MARLBORO BLACK MEN BOX 100 .50 .000
_ 100058 MARLBORO BLACK BOX 100 B2G$2 .50 .000
_ 100028 MARLBORO BLACK MEN SPEC BLEND B 100 .50 .000
_ 100026 MARLBORO BLACK MEN SPEC BLEND BX KS .50 .000
_ 100002 MARLBORO BLACK BOX K/S SOFTPACK .50 .000

```

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

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

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

```

User: JEANNINE          Menu: PREBKCV1          Date: 7/05/21

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

```

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

```

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

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

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

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

```

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


```

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

Choose a file with X and press Enter.
?
- ABLCOL1.PRN
- AGETB.TXT
- ALTRIAHW.CSV
- ALTRIA1.CSV
- APRVIMP.CSV
- ARDETAIL.CSV
- AVGDAYS.PDF
- BANKCK.TXT
- COMMON.DAT
- CO011819.CSV
- CO012119.CSV
- CO122618.CSV
- CO122718.CSV
- CO122818.CSV
+

F3=Exit

```

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

```

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

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

F3=Exit

```

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

```

Choose the Import Format

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

C=Cancel

Choice? B

F3=Exit

```

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

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

DPSOPVR	ENTER	CDR Customer Conference	7/05/21 11:16:59
Enter Prebook Creation Options			
Type choices, press Enter.			
Ship Date	_____	REQUIRED	
Warehouse Code	1 _____	MAIN WAREHOUSE	
Controlling Prebook#	_____	Required by "B" Method	
Deal Utilization	S	(S=Standard, T=Trade Show, X=Normal)	
Deal Number	_____		
User Code #1	_____	Recommended for Tracking	
User Code #2	_____	Recommended for Tracking	
Special Message 1	_____		
Special Message 2	_____		
Special Message 3	_____		
F3=Exit F4=Search			

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

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

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

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

Type choices, press Enter.

Ship Date 081021 REQUIRED
Warehouse Code 1 MAIN WAREHOUSE
Controlling Prebook# 2021 Required by "B" Method
Deal Utilization S (S=Standard, T=Trade Show, X=Normal)
Deal Number
User Code #1 JP Recommended for Tracking
User Code #2 JP Recommended for Tracking

Special Message 1
Special Message 2
Special Message 3

F3=Exit F4=Search

15. Press <Enter> when data entry is complete. The Enter Prebook Creation Options screen is redisplayed, as illustrated below, with data appearing for the **Deal Number** (6,n) and **Special Message 1** (30,a) fields.

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

Type choices, press Enter.

Ship Date 081021 REQUIRED
Warehouse Code 1 MAIN WAREHOUSE
Controlling Prebook# 2021 Format B Import
Deal Utilization S (S=Standard, T=Trade Show, X=Normal)
Deal Number 152 PREBOOKING - #02021
User Code #1 JP Recommended for Tracking
User Code #2 JP Recommended for Tracking

Special Message 1 PREBOOKING - #02021
Special Message 2
Special Message 3

F3=Exit F4=Search

CONFIRM: Y (Y/N)

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

```

...

Invalid Customers:
00000
Accepted Customers:
00008

INFO
----

F3=Exit

```

17. Press <F3> (Exit). The Imported Pre-Book Customers screen appears.

```

DPSUDFR      DISPLAY CDR Customer Conference      7/05/21 12:28:30
              Imported Pre-Book Customers

Batch#
  96

? Batch#  Line#  Cust#
-   96      1 771230 B AND D FOOD STORE #230
-   96      2 100801 BARON EXPRESS #2 BP
-   96      3 260501 BIG JOHN'S QUICK STOP #1
-   96      4 260502 BIG JOHN'S QUICK STOP #2
-   96      5 320001 BIG P MINI MART
-   96      6 100003 BOB'S SHELL
-   96      7 100802 CRANKY CORNER QUICK STOP
-   96      8 800237 DANNY & CLYDE'S FOOD #20

F3=Exit

```

18. Press <F3> (Exit). The Pre-book Orders screen appears.

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

```

CVKGDFR      DISPLAY CDR Customer Conference      7/05/21 12:41:32
              Work with Pre-Book Orders

ShipDate PB ORD# PB#  Cust#  Vendor Deal#  Whs  Deal  Code Code P. Rte
Utilz    #1    #2
-----
      2021      1      -      JP      -      OPEN

2=Edit  9=Cancel  C=Copy  S=Select  U=Unselect  A=Select Available
R=Reset Dates  8=Reprice  Z=Zoom to Header H=Set Hdr from Dtl
? Ship Dte  Cust#  PB-Ord#  Cdel  Cde2  Pbk#
- 8/10/21  771230 B AND D FOOD STORE #230      521  JP  JP  2021
- 8/10/21  100801 BARON EXPRESS #2 BP          522  JP  JP  2021
- 8/10/21  260501 BIG JOHN'S QUICK STOP #1      523  JP  JP  2021
- 8/10/21  260502 BIG JOHN'S QUICK STOP #2      524  JP  JP  2021
- 8/10/21  320001 BIG P MINI MART              525  JP  JP  2021
- 8/10/21  100003 BOB'S SHELL                  526  JP  JP  2021
- 8/10/21  100802 CRANKY CORNER QUICK STOP      527  JP  JP  2021
- 8/10/21  800237 DANNY & CLYDE'S FOOD #20      528  JP  JP  2021

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

```

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

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

```

CVVLDFR      DISPLAY CDR Customer Conference      7/05/21 12:45:35
                                Edit Pre-Book Order
Customer  771230 B AND D FOOD STORE #230
Position Ship Date--> _____ Limit Item--> _____ Limit Order#--> 521
-----
Item _____ Qty _____ U/M _____ Pending 9 Exported 0 SHOW PENDING
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message
-----
      Ord / Line Item  Qty  U/M  Price      Extension
-   M   521    9 100005   18  2 CTN   58.65      1055.70
    Ship Date _81021 MARLBORO BLEND BOX KING #27
-   M   521    8 100001   16  2 CTN   48.15      770.40
    Ship Date _81021 MARLBORO BLEND BOX K/S SOFTPACK
-   M   521    7 100027   14  2 CTN   58.65      821.10
    Ship Date _81021 MARLBORO BLACK SPEC BLEND BOX 100
-   M   521    6 100024   12  2 CTN   58.65      703.80
    Ship Date _81021 MARLBORO BLACK SPEC BLEND BOX KING
-   M   521    5 100004   10  2 CTN   54.69      546.90
    Ship Date _81021 MARLBORO BLACK MEN BOX 100
-   M   521    4 100058   16  2 CTN   54.69      875.04
    Ship Date _81021 MARLBORO BLACK BOX 100 B2G$2      +
-----
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

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

```

CVVLDFR      DISPLAY CDR Customer Conference      7/05/21 12:45:35
                                Edit Pre-Book Order
Customer  771230 B AND D FOOD STORE #230
Position Ship Date--> _____ Limit Item--> _____ Limit Order#--> 521
-----
Item _____ Qty _____ U/M _____ Pending 9 Exported 0 SHOW PENDING
S=Select/Unselect D=Delete 2=Edit Line Properties M=Message
-----
      Ord / Line Item  Qty  U/M  Price      Extension
-   M   521    9 100005   18  2 CTN   58.65      1055.70
    Ship Date _81221 MARLBORO BLEND BOX KING #27
-   M   521    8 100001   16  2 CTN   48.15      770.40
    Ship Date _81221 MARLBORO BLEND BOX K/S SOFTPACK
-   M   521    7 100027   14  2 CTN   58.65      821.10
    Ship Date _81021 MARLBORO BLACK SPEC BLEND BOX 100
-   M   521    6 100024   12  2 CTN   58.65      703.80
    Ship Date _81021 MARLBORO BLACK SPEC BLEND BOX KING
-   M   521    5 100004   10  2 CTN   54.69      546.90
    Ship Date _81021 MARLBORO BLACK MEN BOX 100
-   M   521    4 100058   16  2 CTN   54.69      875.04
    Ship Date _81021 MARLBORO BLACK BOX 100 B2G$2      +
-----
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

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

Using Ten Item Import Format

The CSV file for Ten Item Import Format contains a maximum of 10 items for an unlimited number of customers.

As illustrated below, the CSV file should include item data in columns A through D (for 1 to 10 items) followed by customer data in columns A through E and order quantities in columns F through O as necessary.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	items														
2		100040 MERIT BLUE BOX KING	20PK	2820030171											
3		100041 MERIT BLUE BOX 100	20PK	2820030141											
4		100042 MERIT BLUE 100	20PK	2820030161											
5		100043 MERIT BRONZE BOX KING	20PK	2820030131											
6		100051 VIRGINIA SLIM GOLD BOX 100	20PK	2820017330											
7		100052 VIRGINIA SLIM GOLD MEN BOX 100	20PK	2820017340											
8		100053 VIRGINIA SLIM GOLD MEN 120	20PK	2820017390											
9		100054 VIRGINIA SLIM GOLD 120	20PK	2820017350											
10		100057 VIRGINIA SLIM SILVER BOX 100	20PK	2820017430											
11		119526 VIRGINIA SLIM SILVER MEN BOX 100	20PK	2820017440											
12	customers														
13	JR FOOD MART - ABITA	22079 HWY 59	ABITA SPRINGS	LA	100900	12	10	8	24	8	6	10	8	24	8
14	JR FOOD MART - FOLSOM	82322 HWY 25	FOLSOM	LA	100857	24	12	6	10	12	24	12	6	10	12
15	L & M GROCERY	82562 LEE SETTLEMENT RD	FOLSOM	LA	700180	8	24	8	6	24	8	24	8	6	24
16	LIL SHORT STOP - OCEAN SPRINGS	6436 HWY 57	OCEAN SPRINGS	MS	320092	10	8	24	8	6	6	8	24	8	6
17	LIL SHORT STOP - VANCLEVE	12600 HWY 57	VANCLEVE	MS	320091	12	10	8	24	8	6	10	8	24	8
18	MISS STOP N GO #110	PO BOX 779	BRANCH	MS	380110	24	24	12	6	10	12	24	12	6	10
19	MISS STOP N GO #120	3500 EAST SIDE BLVD	JACKSON	MS	380120	24	12	6	10	12	24	12	6	10	12
20	MISS STOP N GO #130	2009 FOURTH ST	NORTH BRANCH	MS	380130	8	12	10	8	24	8	12	10	8	24
21	MISSISSIPPI STOP N GO	1235 RIVER RD	RIVER CITY	MS	380100	12	10	8	24	8	6	10	8	24	8

The text **items** must be entered in row 1 column A (cell A1) above the item data and **customers** must be entered in column A of the row above the customer data. If necessary, contact CDR support personnel to obtain the PBTEMPLATE.CSV file to use as a template.

The DAC item record fields corresponding to the item data above are **Item Number**, **Item Description**, **Retail PK** and **UPC** for columns A through D respectively.

The DAC customer record fields corresponding to the customer data above are **Customer Name**, **Address Line 1**, **City**, **St** and **Customer Number** for columns A through E respectively.

The order quantity entered in columns F through O correspond to the items entered in row 2 through 11 respectively.

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

The step-by-step instructions below describe using the Import Pre-book Orders application after the CSV file for Ten Item Import Format is uploaded to the CV1COM folder on the distributor's system. Also included are instructions for creating the pre-book orders with the items and customers in the CSV file.

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

```
User: JEANNINE           Menu: PREBKCV1           Date: 7/07/21

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

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

```
HINXDFR   DISPLAY CDR Customer Conference       7/07/21 15:03:24
           Work with Pre-Book Import Batches

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

? Batch#  Date    User      Imported From File
-   103  7/07/21  JEANNINE  Format A
-   96   7/05/21  JEANNINE  Format B
-   93   7/02/21  JEANNINE  Format A
-   49   4/23/21  HARLAND   Format A
-   45   4/14/21  HARLAND   Format A
-   43   4/13/21  HARLAND   Format A
-   39   4/09/21  HARLAND   Format A
-   28  10/22/18  CODY      Format A
-                                     X

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

4. Press <F10> (Ten Item Import). The Import Batch from File screen appears with the previously used CSV file listed.

HIOOPVR	ENTER	CDR Customer Conference	7/07/21 15:08:57
Import Batch from File			
Enter full path & filename of file to import. Ex. /tmp/forceout.dat			
/qdl/cv1com/FORMATB1.csv_____			

F3=Exit			

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

HIOOPVR	ENTER	CDR Customer Conference	7/07/21 15:08:57
Import Batch from File			
Enter full path & filename of file to import. Ex. /tmp/forceout.dat			
/qdl/cv1com/10ITEM01.csv_____			

F3=Exit			

6. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Work With PBI Items screen appears.

HINODFR	DISPLAY	CDR Customer Conference	7/07/21 15:20:56
Work with PBI Items			
Line Number	Actual Item	Imported Item	
D=Delete	?=Select Item#	X=Alt.Select	
Line	Item	Description	Pack UPC
1 Act.	100040	MERIT BLUE BOX KING	20PK 2820030171
Ovr UM _	Import 100040	MERIT BLUE BOX KING	20PK 2820030171
2 Act.	100041	MERIT BLUE BOX 100	20PK 2820030141
Ovr UM _	Import 100041	MERIT BLUE BOX 100	20PK 2820030141
3 Act.	100042	MERIT BLUE 100	20PK 2820030161
Ovr UM _	Import 100042	MERIT BLUE 100	20PK 2820030161
4 Act.	100043	MERIT BRONZE BOX KING	20PK 2820030131
Ovr UM _	Import 100043	MERIT BRONZE BOX KING	20PK 2820030131
5 Act.	100051	VIRGINIA SLIM GOLD BOX 100	20PK 2820017330
Ovr UM _	Import 100051	VIRGINIA SLIM GOLD BOX 100	20PK 2820017330
+			
F3=Exit F7=Jump to Customers F10=Add Item			

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

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

```

HINYDFR      DISPLAY CDR Customer Conference              7/08/21 10:38:21
                                Work with Pre-Book Import:Customer
Line Number   Actual Customer   Imported Customer
D=Delete    ?=Select    X=Alt.Select                      Show All

NOTE:Use F8 Filter By Status

ITEMS:  Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item10
        100040 100041 100042 100043 100051 100052 100053 100054 100057 119526
?      Cust  Address/City/State
-      Act 100900 JR FOOD MART - ABITA, 22079 HWY 59, ABITA SPRINGS, LA
Imp 100900 JR FOOD MART - ABITA, 22079 HWY 59, ABITA SPRINGS, LA
Qty 12 10 8 24 8 6 10 8 24 8
-      Act 100857 JR FOOD MART - FOLSOM, 82322 HWY 25, FOLSOM, LA
Imp 100857 JR FOOD MART - FOLSOM, 82322 HWY 25, FOLSOM, LA
Qty 24 12 6 10 12 24 12 6 10 12
-      Act 700180 L & M GROCERY, 82562 LEE SETTLEMENT RD, FOLSOM, LA
Imp 700180 L & M GROCERY, 82562 LEE SETTLEMENT RD, FOLSOM, LA
Qty 8 24 8 6 24 8 24 8 6 24
+
F2=Show/Hide F3 F4=Show Item F7=Jump to Items F8=Status F10=Add F24=XREFs

```

Refer to Editing Imported Customer Data for additional information about the Work With Pre-book Import:Customer screen.

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

```

HINXDFR      DISPLAY CDR Customer Conference              7/08/21 11:27:51
                                Work with Pre-Book Import Batches

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

? Batch#  Date   User      Imported From File
-      105  7/07/21 JEANNINE /qdl/cv1com/10ITEM01.csv Customers=00009
-      103  7/07/21 JEANNINE Format A
-      96  7/05/21 JEANNINE Format B
-      93  7/02/21 JEANNINE Format A
-      49  4/23/21 HARLAND Format A
-      45  4/14/21 HARLAND Format A
-      43  4/13/21 HARLAND Format A
-      39  4/09/21 HARLAND Format A
-      28 10/22/18 CODY   Format A
X
F3 F10=Ten Item Import F15=Pre-book Refusal Customers F23=Import Version2

```

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

HINXDFR DISPLAY CDR Customer Conference				7/08/21 11:27:51
Work with Pre-Book Import Batches				
2=Edit D=Delete Batch X=Create Pre-book Order(s) 5=Customer Log				
?	Batch#	Date	User	Imported From File
X	105	7/07/21	JEANNINE	/qdlis/cvlicom/10ITEM01.csv Customers=00009
—	103	7/07/21	JEANNINE	Format A
—	96	7/05/21	JEANNINE	Format B
—	93	7/02/21	JEANNINE	Format A
—	49	4/23/21	HARLAND	Format A
—	45	4/14/21	HARLAND	Format A
—	43	4/13/21	HARLAND	Format A
—	39	4/09/21	HARLAND	Format A
—	28	10/22/18	CODY	Format A

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

10. Press <Enter>. The Create Orders From Batch screen appears.

DPSOPVR ENTER CDR Customer Conference		7/08/21 11:46:52
Enter Prebook Creation Options		
Type choices, press Enter.		
Ship Date	_____	REQUIRED
Warehouse Code	1 _____	MAIN WAREHOUSE
Controlling Prebook#	_____	Required by "B" Method
Deal Utilization	S	(S=Standard, T=Trade Show, X=Normal)
Deal Number	_____	
User Code #1	_____	Recommended for Tracking
User Code #2	_____	Recommended for Tracking
Special Message 1	_____	
Special Message 2	_____	
Special Message 3	_____	

F3=Exit F4=Search

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

```

DPSOPVR    ENTER    CDR Customer Conference    7/08/21 11:46:52
                        Enter Prebook Creation Options

Type choices, press Enter.

Ship Date . . . . . 080221 REQUIRED
Warehouse Code . . . . . 1 MAIN WAREHOUSE
Controlling Prebook# . . . . . Required by "B" Method
Deal Utilization . . . . . S (S=Standard, T=Trade Show, X=Normal)
Deal Number . . . . .
User Code #1 . . . . . JP Recommended for Tracking
User Code #2 . . . . . JP Recommended for Tracking

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

F3=Exit    F4=Search

```

14. Enter data for the following fields as necessary:

- **Deal Utilization** (1,a)
- **Deal Number** (6,n)
- **Special Message 1** (30,a)
- **Special Message 2** (30,a)
- **Special Message 3** (30,a)

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

15. Press <Enter> when data entry is complete, and press <Enter> when prompted to confirm. The Work With Pre-book Import Batches screen appears with the ##### *orders created* message where ##### designates the total number of pre-book orders created.

16. Press <F3> (Exit). The Pre-book Orders screen appears.

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

```

CVKGDPR    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
- 8/02/21    100900 JR FOOD MART - ABITA                PB-Ord# Cdel Cde2 Pbk#
- 8/02/21    100857 JR FOOD MART - FOLSOM                564 JP JP
- 8/02/21    700180 L & M GROCERY                        565 JP JP
- 8/02/21    320092 LIL SHORT STOP - OCEAN SPRINGS        566 JP JP
- 8/02/21    320091 LIL SHORT STOP - VANCLEVE            567 JP JP
- 8/02/21    380110 MISS STOP N GO #110                  568 JP JP
- 8/02/21    380120 MISS STOP N GO #120                  569 JP JP
- 8/02/21    380130 MISS STOP N GO #130                  570 JP JP
- 8/02/21    380100 MISSISSIPPI STOP N GO                571 JP JP
- 8/10/21    771230 B AND D FOOD STORE #230              572 JP JP
- 8/10/21    100801 BARON EXPRESS #2 BP                  521 JP JP 2021
- 8/10/21    260501 BIG JOHN'S QUICK STOP #1            522 JP JP 2021
- 8/10/21    260501 BIG JOHN'S QUICK STOP #1            523 JP JP 2021

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

```

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

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

```

CVVLDFR    DISPLAY CDR Customer Conference              7/08/21 12:40:47
                                Edit Pre-Book Order
Customer  100900 JR FOOD MART - ABITA
Position  Ship Date-->      Limit Item-->      Limit Order#-->  564
-----
Item      Qty      U/M  Pending  10  Exported  0 SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message
-----
      Ord / Line Item      Qty  U/M      Price      Extension
-      564    10 119526      8   2 CTN      37.29      298.32
  Ship Date _80221 VIRGINIA SLIM SILVER MEN BOX 100
-      564     9 100057     24   2 CTN      37.29      894.96
  Ship Date _80221 VIRGINIA SLIM SILVER BOX 100
-      564     8 100054      8   2 CTN      37.29      298.32
  Ship Date _80221 VIRGINIA SLIM GOLD 120
-      564     7 100053     10   2 CTN      37.29      372.90
  Ship Date _80221 VIRGINIA SLIM GOLD MEN 120
-      564     6 100052      6   2 CTN      37.29      223.74
  Ship Date _80221 VIRGINIA SLIM GOLD MEN BOX 100
-      564     5 100051      8   2 CTN      37.29      298.32
  Ship Date _80221 VIRGINIA SLIM GOLD BOX 100
+
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

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

```

CVVLDFR    DISPLAY CDR Customer Conference              7/08/21 12:40:47
                                Edit Pre-Book Order
Customer  100900 JR FOOD MART - ABITA
Position  Ship Date-->      Limit Item-->      Limit Order#-->  564
-----
Item      Qty      U/M  Pending  10  Exported  0 SHOW PENDING
S=Select/Unselect  D=Delete  2=Edit Line Properties  M=Message
-----
      Ord / Line Item      Qty  U/M      Price      Extension
-      564    10 119526      8   2 CTN      37.29      298.32
  Ship Date _80621 VIRGINIA SLIM SILVER MEN BOX 100
-      564     9 100057     24   2 CTN      37.29      894.96
  Ship Date _80621 VIRGINIA SLIM SILVER BOX 100
-      564     8 100054      8   2 CTN      37.29      298.32
  Ship Date _80621 VIRGINIA SLIM GOLD 120
-      564     7 100053     10   2 CTN      37.29      372.90
  Ship Date _80621 VIRGINIA SLIM GOLD MEN 120
-      564     6 100052      6   2 CTN      37.29      223.74
  Ship Date _80621 VIRGINIA SLIM GOLD MEN BOX 100
-      564     5 100051      8   2 CTN      37.29      298.32
  Ship Date _80621 VIRGINIA SLIM GOLD BOX 100
+
F2=Glb Tools F3=Exit F5=Refresh F6=Access F7=All F8=Export F10=Hdr

```

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

Editing Imported Item Data

HINODFR	DISPLAY	CDR Customer Conference	9/16/10 10:20:30
Work with PBI Items			
Line Number	Actual Item	Imported Item	
D=Delete	?=Select	X=Alt.Select	
Line	Item	Description	Pack UPC
1	Actual 131761	BASIC FF 100 BOX	20PK 02820016220
Ovr UM	Imported 131761	B&H MENT 100 LT	20PK 2820010520
>>	2	Actual 787878 >>>ITEM NOT FOUND<<<	
Ovr UM	Imported 787878	BASIC FF 100 BOX	20PK 2820000620
3	Actual 83	MARLBORO LIGHTS 100'S	2820010180
Ovr UM	Imported 83	MARLBORO LIGHT 100	20PK 2820010530
4	Actual 119526	VIRGINIA SLIM MENT 100 BOX	20PK 02820013280
Ovr UM	Imported 119526	VIRGINIA SLIM MENT	20PK 2820013280
F3=Exit F4=Search F7=Customers F10=Add Item			

The “imported” item data appearing on the Work With PBI Items screen is derived from the vendor’s spreadsheet, and is subject to error. The item numbers of the imported data are used to select, from the distributor’s Item Master file, the “actual” item data which appears on the screen, and is used to create the pre-book orders.

Review each imported and actual item combination to determine which actual items may be invalid due to data errors in the vendor’s spreadsheet. Possible errors are illustrated above for the following line items:

- Line 1 - the descriptions and UPCs of the actual and imported items differ significantly.
- Line 2 - the imported item number could not be found in the distributor’s Item Master file.
- Line 3 - the UPCs of the actual and imported items differ significantly.

In each case, the user must determine what the actual item should be prior to continuing with the instructions below.

1. To review an item that may be invalid, enter ? (Select) in the selection column next to the actual item.

HINODFR	DISPLAY	CDR Customer Conference	9/16/10 10:20:30
Work with PBI Items			
Line Number	Actual Item	Imported Item	
D=Delete	?=Select	X=Alt.Select	
Line	Item	Description	Pack UPC
?	1	Actual 131761 BASIC FF 100 BOX	20PK 02820016220
Ovr UM	Imported 131761	B&H MENT 100 LT	20PK 2820010520
>>	2	Actual 787878 >>>ITEM NOT FOUND<<<	
Ovr UM	Imported 787878	BASIC FF 100 BOX	20PK 2820000620
3	Actual 83	MARLBORO LIGHTS 100'S	2820010180
Ovr UM	Imported 83	MARLBORO LIGHT 100	20PK 2820010530
4	Actual 119526	VIRGINIA SLIM MENT 100 BOX	20PK 02820013280
Ovr UM	Imported 119526	VIRGINIA SLIM MENT	20PK 2820013280
F3=Exit F4=Search F7=Customers F10=Add Item			

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

HIONSRR	SELECT	CDR Customer Conference	9/16/10 10:21:24
Select Item			
Item Description	Cat.	Sales Prod. Tax	Vendor Sts
	Class Class Class		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 CRYSTAL		902026 9 850	A
BLACKJACK FULL FLAVOR 16OZ		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 Status			

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

HINODFR	DISPLAY	CDR Customer Conference	9/16/10 12:47:36
Work with PBI Items			
Line Number	Actual Item	Imported Item	
D=Delete	?=Select	X=Alt.Select	
Line	Item	Description	Pack UPC
>> 1	Actual 108300	B&H MENT 100 LT	20PK 02820010520
Ovr UM	Imported 131761	B&H MENT 100 LT	20PK 2820010520
>> 2	Actual 787878	>>>ITEM NOT FOUND<<<	
Ovr UM	Imported 787878	BASIC FF 100 BOX	20PK 2820000620
3	Actual 83	MARLBORO LIGHTS 100'S	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			

As illustrated above, double arrows (>>) appear next to the line number of an item to designate the following:

- Red arrows appear to warn the user that the item's data will not be included in pre-book orders.
- Yellow arrows indicate that the actual and imported item numbers differ, but the actual item's data will be included in pre-book orders.

4. To delete an item from the pre-book import batch, enter D (Delete) in the selection column next to the actual item.

HINODFR	DISPLAY CDR Customer Conference	9/16/10 13:56:14
Work with PBI Items		
Line Number	Actual Item	Imported Item
D=Delete	?=Select	X=Alt.Select
Line	Item	Description
>>	1 Actual	108300 B&H MENT 100 LT
Ovr UM	Imported	131761 B&H MENT 100 LT
Pack		UPC
		20PK 02820010520
		20PK 2820010520
>>	2 Actual	787878 >>>ITEM NOT FOUND<<<
Ovr UM	Imported	787878 BASIC FF 100 BOX
Pack		UPC
		20PK 2820000620
	3 Actual	83 MARLBORO LIGHTS 100'S
Ovr UM	Imported	83 MARLBORO LIGHT 100
Pack		UPC
		20PK 2820010180
		20PK 2820010530
D	4 Actual	119526 VIRGINIA SLIM MENT 100 BOX
Ovr UM	Imported	119526 VIRGINIA SLIM MENT
Pack		UPC
		20PK 02820013280
		20PK 2820013280
F3=Exit F4=Search F7=Customers F10=Add Item		

Press <Enter>.

HINODFR	DISPLAY CDR Customer Conference	9/16/10 14:06:04
Work with PBI Items		
Line Number	Actual Item	Imported Item
D=Delete	?=Select	X=Alt.Select
Line	Item	Description
>>	1 Actual	108300 B&H MENT 100 LT
Ovr UM	Imported	131761 B&H MENT 100 LT
Pack		UPC
		20PK 02820010520
		20PK 2820010520
>>	2 Actual	131761 BASIC FF 100 BOX
Ovr UM	Imported	787878 BASIC FF 100 BOX
Pack		UPC
		20PK 02820016220
		20PK 2820000620
	3 Actual	83 MARLBORO LIGHTS 100'S
Ovr UM	Imported	83 MARLBORO LIGHT 100
Pack		UPC
		20PK 2820010180
		20PK 2820010530
F3=Exit F4=Search F7=Customers F10=Add Item		

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

HINODFR	DISPLAY CDR Customer Conference	9/16/10 14:06:04
Work with PBI Items		
Line Number	Actual Item	Imported Item
D=Delete	?=Select	X=Alt.Select
Line	Item	Description
>>	1 Actual	108300 B&H MENT 100 LT
Ovr UM 1	Imported	131761 B&H MENT 100 LT
Pack		UPC
		20PK 02820010520
		20PK 2820010520
>>	2 Actual	131761 BASIC FF 100 BOX
Ovr UM	Imported	787878 BASIC FF 100 BOX
Pack		UPC
		20PK 02820016220
		20PK 2820000620
	3 Actual	83 MARLBORO LIGHTS 100'S
Ovr UM	Imported	83 MARLBORO LIGHT 100
Pack		UPC
		20PK 2820010180
		20PK 2820010530
F3=Exit F4=Search F7=Customers F10=Add Item		

- To add an item to the pre-book import batch, press <F10> (Add Item). The Add Pre-book Batch Item window appears.
- Enter the item number for the **Item Number** field, press <Enter>, and press

<Enter> when prompted to confirm. The new actual item appears on the Work With PBI Items screen.

HINODFR	DISPLAY CDR Customer Conference					9/16/10 14:11:01	
Work with PBI Items							
Line Number		Actual Item			Imported Item		
D=Delete ?=Select X=Alt.Select							
	Line	Item	Description			Pack	UPC
>>	1	Actual	108300	B&H MENT	100 LT	20PK	02820010520
Ovr UM		Imported	131761	B&H MENT	100 LT	20PK	2820010520
>>	2	Actual	131761	BASIC FF	100 BOX	20PK	02820016220
Ovr UM		Imported	787878	BASIC FF	100 BOX	20PK	2820000620
	3	Actual	83	MARLBORO	LIGHTS 100'S		2820010180
Ovr UM		Imported	83	MARLBORO	LIGHT 100	20PK	2820010530
>>	4	Actual	119526	VIRGINIA	SLIM MENT 100 BOX	20PK	02820013280
Ovr UM		Imported	0				
F3=Exit F4=Search F7=Customers F10=Add Item							

Editing Imported Customer Data

1. Press <F7> (Customers) to view the imported and actual customer data.

```
HINYDFR    DISPLAY Creative Data Research, Inc.          9/17/10 16:19:25
                                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select
Type options, press Enter.
ITEMS:  Item1 Item2 Item3 Item4 Item5 Item6 Item7 Item8 Item9 Item10
        131761 787878      83 119526
?      Cust  Address/City/State
>> Act 100111 >> Customer Not Found <<
Imp 100111 BOB'S SHELL, 23601 HWY 190, COVINGTON, LA
Qty    10    10    10    10

Act 380130 MISS STOP N GO #130, 2009 FOURTH ST, NORTH BRANCH, MS
Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
Qty     4     4     4     4

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

Like the the Work With PB Items screen, both “imported” and “actual” data appears on the Work With Pre-book Import:Customer screen. The imported customer data (designated with **Imp**) is derived from the vendor’s spreadsheet, and is subject to error. The customer numbers of the imported data are used to select, from the distributor’s Customer Master file, the “actual” customer data (designated with **Act**) which appears on the screen, and is used to create the pre-book orders.

Review each imported and actual customer combinations to determine which actual customers may be invalid due to data errors in the vendor’s spreadsheet. Possible errors illustrated above include:

- The imported customer number *100111* could not be found in the distributor’s Customer Master file.
- The name and address of the actual and imported customer number *100850* differ significantly.

In each case, the user must determine what the actual customer should be prior to continuing with the instructions below.

2. To review a customer that may be invalid, enter ? (Select) in the selection column next to the actual customer.

```

HINYDFR   DISPLAY Creative Data Research, Inc.          9/17/10 16:19:25
                                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select              Show All
Type options, press Enter.
ITEMS:   Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item10
         131761 787878      83 119526
?       Cust  Address/City/State
>> Act 100111 >> Customer Not Found <<
Imp 100111 BOB'S SHELL, 23601 HWY 190, COVINGTON, LA
Qty    10    10    10    10

?       Act 380130 MISS STOP N GO #130, 2009 FOURTH ST, NORTH BRANCH, MS
Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
Qty     4     4     4     4

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

```

3. Press <Enter>. The Select Customer Master screen appears.

```

DSAASRR   SELECT Creative Data Research, Inc.          9/17/10 16:06:46
                                Select Customer Master
Customer Name      Rep.  Corp#  State  Zip  Phone  Sts
City              Addr1
Type options, press Enter.
X=Select request  N=Customer Notes
?       Customer Name      Phone  Rep.  Corp#  Cust#  Status
B & D FOOD STORE          713 610-7701 20    771230 771230  A
BARON EXPRESS #2 BP      985 727-1141 10    100801 100801  A
BIG JOHN'S QUICK STOP #1 985 796-5252 DAVID 265000 260501  A
BIG P MINI MART          601 868-7050 20    320001 320001  A
BOB'S SHELL              985 871-5151 10    100003 100003  A
CRANKY CORNER QUICK STOP 985 796-8111 20    100802 100802  A
DANNY & CLYDE'S FOOD STORE #20      20    800237 800237  A
DIANNE'S GROCERY         985 892-0058 HARLAN 100002 100002  A
EXPRESS WAY FOOD MART    985 893-0099 20    100850 100850  A
GAS-N-SHOP #6            985 892-9919 HARLAN 100855 100855  A
JR FOOD MART - ABITA     985 893-6160 20    100900 100900  A +

F3=Exit

```

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

```

HINYDFR   DISPLAY Creative Data Research, Inc.          9/17/10 16:20:2
                                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select              Show All
Type options, press Enter.
ITEMS:   Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item1
         131761 787878      83 119526
?       Cust  Address/City/State
>> Act 100111 >> Customer Not Found <<
Imp 100111 BOB'S SHELL, 23601 HWY 190, COVINGTON, LA
Qty    10    10    10    10

>> Act 380120 MISS STOP N GO #120, 3500 EAST SIDE BLVD, JACKSON, MS      N
Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
Qty     4     4     4     4

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

```

As illustrated above, double arrows (>>) appear next to actual customer data to designate the following:

- Red arrows appear to warn the user that the customer's data will not be included in pre-book orders.

- Yellow arrows indicate that the actual and imported customer numbers differ, but the actual customer's data will be included in pre-book orders.
5. To delete a customer from the pre-book import batch, enter *D* (Delete) in the selection column next to the actual customer.

```

HINYDFR   DISPLAY Creative Data Research, Inc.          9/17/10 16:29:07
                                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select                      Show All
Type options, press Enter.
ITEMS:  Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item10
        131761 787878      83 119526
?       Cust  Address/City/State
D >> Act 100111 >> Customer Not Found <<
      Imp 100111 BOB'S SHELL, 23601 HWY 190, COVINGTON, LA
      Qty   10    10    10    10

      >> Act 380120 MISS STOP N GO #120, 3500 EAST SIDE BLVD, JACKSON, MS      N
      Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
      Qty    4     4     4     4

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

```

Press <Enter>.

```

HINYDFR   DISPLAY Creative Data Research, Inc.          9/17/10 17:01:06
                                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select                      Show All
Type options, press Enter.
ITEMS:  Item1  Item2  Item3  Item4  Item5  Item6  Item7  Item8  Item9  Item10
        131761 787878      83 119526
?       Cust  Address/City/State
      >> Act 380120 MISS STOP N GO #120, 3500 EAST SIDE BLVD, JACKSON, MS      N
      Imp 380130 MISS STOP N GO, 3500 EAST SIDE BLVD, JACKSON, MS
      Qty    4     4     4     4

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

```

6. To add a customer to the pre-book import batch, press <F10> (Add). The Add Customer window appears.
7. Enter the customer number for the **Customer Number** field, press <Enter>, and press <Enter> when prompted to confirm. The new actual customer appears on the Work With Pre-book Import:Customer screen.

```

HINYDFR      DISPLAY CDR Customer Conference                      9/29/10  7:48:17
                                Work with Pre-Book Import:Customer
Line Number      Actual Customer      Imported Customer
D=Delete  ?=Select  X=Alt.Select                      Show All
Type options, press Enter.
ITEMS:   Item1 Item2 Item3 Item4 Item5 Item6 Item7 Item8 Item9 Item10
        131761 787878      83 119526
?      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

```
HINXDFR    DISPLAY CDR Customer Conference          7/13/21 12:41:12
              Work with Pre-Book Import Batches

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

? Batch#  Date      User      Imported From File
-      119   7/09/21  JEANNINE   Format B
-      118   7/09/21  JEANNINE   Format A
-      114   7/09/21  JEANNINE   Format A
-
F3  F10=Ten Item Import  F15=Pre-book Refusal Customers  F23=Import Version2
```

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

```
HISSDFR    DISPLAY CDR Customer Conference          7/13/21 12:42:09
              Work with Vendor/Customer Promo Refusal List
Vendor Cust#  Accept
              Promo?
_____
Use *ALL As Vendor# If Customer Refuses ALL Forceouts

Enter Vendor/Customer and F10 to Add.F6 Prints all Vendors - Restrict at Top
D=Delete
? Vendor Vendor Name      Cust#  Customer Name      Acpt?
- *ALL  ALL VENDORS!      320055 OCEAN SPRINGS QUICK STOP      N
- ALT001 ALTADIS USA      771230 B AND D FOOD STORE #230      N
F3=Exit F4=Search F6=Print F10=Add
```

2. Enter one of the following for the **Vendor** field (6,a):
 - The vendor code of the vendor whose deals are those in which the customer refuses to participate. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
 - **ALL* to designate that the customer refuses to participate in all the vendors' deals.
3. Enter the customer number for the **Cust#** (6,n) field to designate the customer who refuses to participate in the vendor's deals. If necessary, press <F4> to select a customer number from the Select Customer Master screen.

```

HISSDFR      DISPLAY CDR Customer Conference      7/13/21 13:10:16
                Work with Vendor/Customer Promo Refusal List
Vendor Cust#  Accept
              Promo?
PHI001 100850  _      Use *ALL As Vendor# If Customer Refuses ALL Forceouts

Enter Vendor/Customer and F10 to Add.F6 Prints all Vendors - Restrict at Top
D=Delete
? Vendor Vendor Name      Cust#  Customer Name      Acpt?
_  *ALL  ALL VENDORS!      320055 OCEAN SPRINGS QUICK STOP      N
_  ALT001 ALTADIS USA      771230 B AND D FOOD STORE #230      N

F3=Exit F4=Search F6=Print F10=Add

```

4. Press <Enter> and press <F10> (Add).
5. Enter *Y* when the *Add This Customer to the Promotional Refusal List for This Vendor?* message appears, and press <Enter>.

```

HISSDFR      DISPLAY CDR Customer Conference      7/13/21 13:12:43
                Work with Vendor/Customer Promo Refusal List
Vendor Cust#  Accept
              Promo?
_____ _      Use *ALL As Vendor# If Customer Refuses ALL Forceouts

Enter Vendor/Customer and F10 to Add.F6 Prints all Vendors - Restrict at Top
D=Delete
? Vendor Vendor Name      Cust#  Customer Name      Acpt?
_  *ALL  ALL VENDORS!      320055 OCEAN SPRINGS QUICK STOP      N
_  ALT001 ALTADIS USA      771230 B AND D FOOD STORE #230      N
_  PHI001 PHILLIP MORRIS INC. 100850 EXPRESS WAY FOOD MART      N

F3=Exit F4=Search F6=Print F10=Add

```

6. If desired, press <F6> (Print) to print the Print Prebook Refusals report.
7. Repeat the previous steps to continue adding vendor/customer combinations to the refusal list, and press <F3> (Exit) when data entry is complete. The Work With Pre-book Import Batches screen appears.

Working With Pre-book Reports

The Pre-book Reports application (option 6 of the Pre-Book Orders screen) is used to print the following reports:

- Print Pre-book Orders
- Print Pre-book Orders By Customer
- Print Pending Pre-book Orders
- Pre-booking By Ship Date
- Print Pre-book Orders By Route/Stop
- Customer Pre-book Notification Report
- Pre-book Vendor Recap Report
- Print Pre-book Orders (Cancelled)
- Pre-booking Item Summary
- Pre-book Recap By Group Reports - Pre-booking Vendor Recap, Pre-book Customer Recap and Pre-book Recap Summary.

The Customer Pre-book Notification Report and Pre-booked Items report can be emailed to customers. Refer to Emailing Pre-book Notifications for additional information.

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

```
User: JEANNINE          Menu: OTHCV1          Date: 1/22/14

=====O T H E R   O P E R A T I O N S <=====
=====
|||||
THE   ||
DAC   ||
SYSTEM ||
|||||
1. Archive Functions
2. Unitrac (PMSTARS Etc.)
3. QDN Interface
4. E-Mail
5. Pre-Booked Order System
6. PMCM05 Program
7. Hershey Reporting
8. DEA Allocation
9. PERCS Reporting
10. NTS/Victory Reporting
11. Red Bull Reporting
M E N U   C A L L S
19. Other Operations 2
20. CDS Reporting
21. WAM/InfoMetrics
22.
23. Dac Main Menu
90. Sign Off
=====
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==>
```

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

```

User: JEANNINE                      Menu: PREBKC1V1                      Date: 1/22/14

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

```

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

```

User: JEANNINE                      Menu: PRBKRCV1                      Date: 11/20/14

===== > P R E B O O K   R E P O R T S < =====
=====
|||||      1. Buyer/Saleman                      12. Audit Log
THE      ||      2. Customer Collection          13. User Opts
DAC      ||      3. Pending for Warehouse
SYSTEM   ||      4. Buyer by Ship Date
|||||      5. Route/Date Notification (Driver)
|||||      6. Customer Notification (Alternate)
|||||      7. Vendor Recap
|||||      8. Cancelled Pre-Book Order Report
|||||      9. Prebook Item Summary by Date
|||||     10. Prebook Recap by Group
|||||     11. Customer Notification (Email)
|||||      M E N U   C A L L S
19. Prebooks    20. Billing                      21.
22.             23. Dac Main Menu              90. Sign Off
=====
==>

```


Printing A Print Pre-book Orders Report

The Print Pre-book Orders report details the pre-book orders yet-to-be exported per sales representative or buyer.

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

```
User: JEANNINE          Menu: PRBKRCV1          Date: 1/22/14

===== > P R E B O O K   R E P O R T S < =====
=====
|||||||
THE    ||          1. Buyer/Saleman                12. Audit Log
DAC    ||          2. Customer Collection
SYSTEM ||          3. Pending for Warehouse
|||||||          4. Buyer by Ship Date
|||||||          5. Route/Date Notification (Driver)
          6. Customer Notification (Alternate)
          7. Vendor Recap
          8. Cancelled Pre-Book Order Report
          9. Prebook Item Summary by Date
         10. Prebook Recap by Group
         11. Customer Notification (Email)
          M E N U   C A L L S
19. Prebooks          20. Billing                    21.
22.                   23. Dac Main Menu              90. Sign Off
=====
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==>
```

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

```
XPREFVR  ENTER  CDR Customer Conference          1/22/14  9:35:06
              Prompt Pre-Book Report

              Input desired Data, then Press Enter
              Then Press CMD6

              Date Range:  000000 to  000000  (mmddyy)

              Sequence by:

              X   Sales Rep:  _____ (blanks=ALL Reps)
                Page Break on Customer?  N      (Y or N)

              OR

              -   Buyer:     _____ (blanks=ALL Buyers)
                Warehouse   _____ (optional)

F3=Exit  F4=Prompt  F6=Print
```

3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to shipping dates.
4. To limit the orders included to the customers of a specific sales representative, enter an employee code for the **Sales Rep** (6,a) field. Users can press <F4> to select a code from the Select Employee Master screen.
5. To designate that the report breaks by customer, enter *Y* for the **Page Break on Customer?** (1,a) field.

6. To limit the orders included to the items of a specific vendor, enter an employee code for the **Buyer** (6,a) field. Users can press <F4> to select a code from the Select Employee Master screen.
7. To limit the report to items of a specific warehouse, enter a warehouse code for the **Warehouse** (6,a) field.
8. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Print Pre-book Orders By Customer Report

The Print Pre-book Orders By Customer report details the pre-book orders yet-to-be exported for a designated customer collection.

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

```
User: JEANNINE          Menu: PRBKRCV1          Date: 1/31/14

===== > P R E B O O K   R E P O R T S <=====
=====
|||||
THE  ||
DAC  ||
SYSTEM ||
|||||
1. Buyer/Saleman          12. Audit Log
2. Customer Collection
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification(Email)
M E N U   C A L L S
19. Prebooks             20. Billing                21.
22.                     23. Dac Main Menu          90. Sign Off
=====
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==>
```

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

```
XPREP2  ENTER  CDR Customer Conference          1/30/14 15:23:04
              Prompt Pre-Book Report

              Input desired Data, then Press Enter
              Then Press CMD6

              Customer Collection: 00000

              Date Range: 000000 to 000000 (mmddyy)

F3=Exit  F4=Prompt  F6=Print
```

3. Enter a customer collection number for the **Customer Collection** (5,n) field, or press <F4> to create and select a collection from the Select Customer Coll screen. Refer to Working With Customer Collections of the Customer File Maintenance document for additional information about creating a collection.
4. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to the shipping dates.
5. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Print Pending Pre-book Orders Report

The Print Pending Pre-book Orders report is printed weekly for use by warehouse personnel who prepare locations for new items.

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

```
User: JEANNINE          Menu: PRBKRCV1          Date: 1/31/14

===== > P R E B O O K   R E P O R T S < =====
=====
|||||
THE   ||
DAC   ||
SYSTEM ||
|||||
1. Buyer/Saleman          12. Audit Log
2. Customer Collection
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification(Email)
M E N U   C A L L S
19. Prebooks              20. Billing
22.                       23. Dac Main Menu      90. Sign Off
=====
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==>
```

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

```
XPREFVP  ENTER  CDR Customer Conference          1/31/14 11:57:56
              Prompt Pre-Book PENDING Report

              Input desired Data, then Press Enter
              Then Press CMD6

              Date Range: 000000 to 000000 (mmddy)

Select:

PreBook Number: 0000000 (blanks=ALL PreBooks)
Vendor Number:  _____ (blanks=ALL Vendors)
Item Number: 000000 (blanks=ALL Items)
Template or Order: 0 (T or O)

F3=Exit F4=Prompt F6=Print
```

3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to the shipping dates.
4. Enter data as necessary for the following fields:
 - **PreBook Number** (7,n) - a pre-book order's number.
 - **Vendor Number** (6,a) - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
 - **Item Number** (6,n) - an item number. If necessary, press <F4> to select an item number from the Select Item By Description screen.
5. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Pre-booking By Ship Date Report

The Pre-booking By Ship Date report is printed by buyers.

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

```
User: JEANNINE          Menu: PRBKRCV1          Date: 1/31/14

===== > P R E B O O K   R E P O R T S <=====
=====
|||||||
THE    ||
DAC    ||
SYSTEM ||
|||||||
1. Buyer/Saleman          12. Audit Log
2. Customer Collection
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks              20. Billing                21.
22.                      23. Dac Main Menu          90. Sign Off
=====
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==>
```

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

```
GWREPVR   ENTER   CDR Customer Conference          1/31/14 13:44:26
              Prebooking by Ship Date

Type choices, press Enter.

              Ship Date _____

F3=Exit   F6=Print
```

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

Printing A Print Pre-book Orders By Route/Stop Report

The Print Pre-book Orders By Route/Stop report is printed for delivery by drivers to customers in advance of their pre-book order deliveries.

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

```
User: JEANNINE          Menu: PRBKRCV1          Date: 1/31/14

===== > P R E B O O K   R E P O R T S < =====
=====
|||||||
THE    ||
DAC    ||
SYSTEM ||
|||||||
1. Buyer/Saleman
2. Customer Collection
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks
22.
20. Billing
23. Dac Main Menu
12. Audit Log
21.
90. Sign Off
=====
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==>
```

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

```
XPREP3  ENTER  CDR Customer Conference          1/31/14 14:32:52
              Prompt Pre-Book Report

              Input desired Data, then Press Enter
              Then Press CMD6

              Date Range: 000000 to 000000 (mmddyy)

              Route Range: _____ to _____

              Report Message:
              These items are prebook items for next week. You cannot return these items.
              If you have any questions please see store owner, supervisor, chain purchasing.
              Any other questions please call Customer Service. _____

              F3=Exit  F4=Prompt  F6=Print
```

3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to shipping dates.
4. Enter route codes for the **Route Range:** and **to** (6,a) fields to limit the orders which are included in the report according to delivery routes.
5. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Customer Pre-book Notification Report

The Customer Pre-book Notification Report is printed to notify customers in advance of their pre-book order deliveries. Refer to Emailing Pre-book Notifications for information about using Customer Notification-Email (option 11) to email the report as a PDF file attachment.

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

```
User: JEANNINE          Menu: PRBKRCV1          Date: 1/31/14

===== > P R E B O O K   R E P O R T S < =====
=====
|||||
THE   ||
DAC   ||
SYSTEM ||
|||||
1. Buyer/Saleman
2. Customer Collection
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks
20. Billing
21.
22.
23. Dac Main Menu
90. Sign Off

=====
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==>
```

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

```
XPREPVN  ENTER  CDR Customer Conference          1/31/14 14:49:04
Prompt Pre-Book CUSTOMER NOTIFICATION Report

Input desired Data, then Press Enter
Then Press CMD6

Date Range: 000000 to 000000 (mmddyy)

Select:
Customer Number: 000000 (blanks=ALL Customers)
Deal Number: 0000000 (blanks=ALL DEALS)
Salesman Number: (blanks=All Salesmen)
Corp Number: 000000 (blanks=All Corps)
Vendor Number: (blanks=ALL Vendors)

Print Multi-Free Items? N (Y or N)
Print Cost Price Info? Y (Y or N)
Print Item# on Report? Y (Y or N)

Detailed or Consolidated? D (D or C)

Templates or Orders? O (T or O)

F3=Exit F4=Prompt F6=Print
```

3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the orders which are included in the report according to shipping dates.
4. Enter data as necessary for the following fields:
 - **Customer Number** (6,n) - a customer's number. Users can press <F4> to select a customer from the Select Customer Master screen.
 - **Deal Number** (6,n) - a vendor deal's number.
 - **Salesman Number** (6,a) - a sales representative's employee code. Users can press <F4> to select a code from the Select Employee Master screen.

- **Corp Number** (6,n) - a corporate customer's number. Users can press <F4> to select a number from the Select Corporate Master screen.
 - **Vendor Number** (6,a) - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
 - **Print Multi-Free Items?** (1,a) - for use with a future upgrade of DAC.
5. Enter *N* for the **Print Cost Price Info?** (1,a) field to prohibit the printing of cost and price information on the report.
 6. Enter *N* for the **Print Item# on Report?** (1,a) field to prohibit the printing of item numbers on the report.
 7. Enter *C* for the **Detailed or Consolidated?** (1,a) field to print a report without the item detail.
 8. Enter *T* for the **Templates or Orders?** (1,a) field to print a report without pre-book order numbers.
 9. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Pre-book Vendor Recap Report

The Pre-book Vendor Recap Report is printed by buyers.

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

```
User: JEANNINE          Menu: PRBKRCV1          Date: 11/20/14

===== > P R E B O O K   R E P O R T S <=====
=====
|||||||
THE   ||
DAC   ||
SYSTEM ||
|||||||

1. Buyer/Saleman
2. Customer Collection
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks
22.
20. Billing
23. Dac Main Menu
12. Audit Log
13. User Opts
21.
90. Sign Off

==>
```

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

```
XPREFVV  ENTER  CDR Customer Conference          11/20/14 13:20:03
Prompt Pre-Book VENDOR RECAP Report

Input desired Data, then Press Enter
Then Press CMD6

Date Range:  000000 to  000000  (mmddyy)
              (blanks=ALL Dates)

Select:

PreBook Number:  0000000      (blanks=ALL PreBooks)

Vendor Number:   _____  (blanks=ALL Vendors)

Sequence:

Alpha or Numeric:  N          (A or N)

Templates or Orders:  O        (T or O)

F3=Exit  F4=Prompt  F6=Print
```

3. Enter dates for the **Date Range:** and **to** (6,n) fields to limit the items which are included in the report according to the shipping dates.
4. Enter data as necessary for the following fields:
 - **PreBook Number** (7,n) - a pre-book order's number.
 - **Vendor Number** (6,a) - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
5. Enter *A* for the **Alpha or Numeric** (1,a) field to print the items by description in alphanumeric order.
6. Enter *T* for the **Templates or Orders?** (1,a) field to print a report without pre-book order numbers.

7. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing A Report Of Cancelled Pre-book Orders

The Print Pre-book Orders report details the pre-book orders cancelled since the last time the report was printed.

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

```
User: JEANNINE          Menu: PRBKRCV1          Date: 11/20/14

===== > P R E B O O K   R E P O R T S <=====
=====
|||||
THE   ||
DAC   ||
SYSTEM ||
|||||
1. Buyer/Saleman
2. Customer Collection
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks
22.
20. Billing
23. Dac Main Menu
12. Audit Log
13. User Opts
21.
90. Sign Off

==>
```

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

```
GWU1PVR  ENTER  CDR Customer Conference          11/20/14 13:42:26
                          Prompt For Cancelled Rpt

This Program Will Print All Pre-Book Orders That Have Been Marked CANCELLED.
After The Report Prints, The Cancelled Orders Will Be Purged From The Pre-Book
Order File. Press Enter To Continue Or F3 To Exit Without Running.

F3=Exit
```

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

Printing A Pre-booking Item Summary Report

The Pre-booking Item Summary report is provides a snapshot of the pre-booked items with totals in the warehouse.

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

```
User: JEANNINE           Menu: PRBKRCV1           Date: 11/20/14

===== > P R E B O O K   R E P O R T S <=====
=====
|||||
THE   ||
DAC   ||
SYSTEM ||
|||||

1. Buyer/Saleman           12. Audit Log
2. Customer Collection     13. User Opts
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks              20. Billing
22.                       23. Dac Main Menu
                       21.
                       90. Sign Off

==>
```

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

```
GWMPVVR  ENTER  CDR Customer Conference           11/20/14 13:54:11
Prebook Item Summary

Type choices, press Enter.

From Date _____
End Date   _____
Pre-book#  _____ (Optional)

F3=Exit  F6=Print
```

3. Enter data as necessary for the following fields:
 - **From Date** and **End Date** (6,n) - date range to limit the items which are included in the report according to the shipping dates.
 - Optional: **Pre-book#** (7,n) - a pre-book order's number.
4. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.

Printing Pre-book Recap By Group Reports

The following pre-book recap reports can be printed for a group of pre-book defaults after pre-book orders built using the defaults are posted and end of day processing is completed:

- Pre-booking Vendor Recap is used for collecting from the vendor.
 - Pre-book Customer Recap is a more detailed report used for auditing purposes.
 - Pre-book Recap Summary is used to backup the vendor recap report.
1. Select option 6 (Pre-book Report Menu) from the Pre-book Orders screen. The Pre-book Reports screen appears.

```
User: JEANNINE           Menu: PRBKRCV1           Date: 11/20/14

===== > P R E B O O K   R E P O R T S <=====
=====
|||||
THE   ||
DAC   ||
SYSTEM ||
|||||

1. Buyer/Saleman
2. Customer Collection
3. Pending for Warehouse
4. Buyer by Ship Date
5. Route/Date Notification (Driver)
6. Customer Notification (Alternate)
7. Vendor Recap
8. Cancelled Pre-Book Order Report
9. Prebook Item Summary by Date
10. Prebook Recap by Group
11. Customer Notification (Email)
M E N U   C A L L S
19. Prebooks
22.
20. Billing
23. Dac Main Menu
12. Audit Log
13. User Opts
21.
90. Sign Off

==>
```

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

```
HIB5PVR  ENTER  CDR Customer Conference           11/20/14 14:45:10
Pre-Book Recap by Group

Print a Recap of The Final Results of a Group of Prebook Defaults

Prebook Group _

These Reports Only Reflect Complete Information AFTER the Prebooks Have
Posted in the Order File and Moved to Order History at End of Day.

The Prebooks Must Be Created Via "Prebook Defaults" and Auto Purging Prebooks
After Export Must Be Turned Off.

F3=Exit  F6=Print Vendor Recap  F8=Print Customer Recap  F10=Customer Summary
```

3. Enter a group code for the **Prebook Group** (1,a) field.
4. To print the Pre-booking Vendor Recap, press <F6>, and press <Enter> to confirm. The Pre-book Reports screen appears.

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

Emailing Pre-book Notifications

If outbound email functionality is enabled on the distributor's system, the Customer Pre-book Notification Report and Pre-booked Items report can be emailed as PDF file attachments to notify customers and the account's sales rep in advance of pre-book order deliveries.

No reports are printed on the distributor's system when they are emailed, but the files that are sent as attachments will appear as documents in the DACEMAIL folder of the system. Refer to Emailing Pre-book Notifications of the System File Maintenance document for additional information.

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

```
User: JEANNINE          Menu: PRBKRCV1          Date: 7/23/15

======> P R E B O O K   R E P O R T S <=====
|||||||
THE    ||          1. Buyer/Saleman              12. Audit Log
DAC    ||          2. Customer Collection         13. User Opts
SYSTEM ||          3. Pending for Warehouse
|||||||          4. Buyer by Ship Date
          5. Route/Date Notification (Driver)
          6. Customer Notification (Alternate)
          7. Vendor Recap
          8. Cancelled Pre-Book Order Report
          9. Prebook Item Summary by Date
         10. Prebook Recap by Group
         11. Customer Notification(Email)
M E N U   C A L L S
19. Prebooks          20. Billing                21.
22.                   23. Dac Main Menu          90. Sign Off

==>
```

2. Select option 11 (Customer Notification-Email) from the Pre-book Reports screen. The Pre-Book Notification Report-Email screen appears.

```
HIVEPVR  ENTER  CDR Customer Conference          7/23/15  9:33:43
              Pre-Book Notification Report(Email)

Type choices, press Enter.

      Date Range:  _____ To  _____

      Customer #:  _____
      Cust Coll #:  _____

      Salesman #:  _____
      Corporate #:  _____

      Email Reports?  _ Y (Y,N,Blank)
      Version:       _ 1 (1,2)  Include Online? N  Include Remote? N

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

3. Enter dates for the **Date Range:** and **To** (6,n) fields, and press <Field Exit> to limit the orders which are included in the report according to shipping dates.

4. To email the Customer Pre-book Notification Report, enter 2 for the **Version** (1,a) field, press <Field Exit>, press <Enter>, and enter data as necessary for the following fields:
- **Customer #** (6,n) - a customer's number. Users can press <F4> to select a customer from the Select Customer Master screen.
 - **Cust Coll #** (5,n) - a customer collection number. Users can press <F4> to create and select a collection from the Select Customer Coll screen. Refer to Working With Customer Collections of the Customer File Maintenance document for additional information about creating a collection.
 - **Pre-book #** (7,n) - a pre-book order's number.
 - **Salesman #** (6,a) - a sales representative's employee code. Users can press <F4> to select a code from the Select Employee Master screen.
 - **Corporate #** (6,n) - a corporate customer's number. Users can press <F4> to select a number from the Select Corporate Master screen.
 - **Vendor #** (6,a) - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.
 - **Print Multi-Free Items?** (1,a) - for use with a future upgrade of DAC.
 - **Print Cost Price Info?** (1,a) - enter *N* to prohibit the printing of cost and price information on the report.
 - **Print Item# on Report?** (1,a) - enter *N* to prohibit the printing of item numbers on the report.
 - **Detailed or Consolidated?** (1,a) - enter *C* to print a report without the item detail.
 - **Templates or Orders?** (1,a) - enter *T* to print a report without pre-book order numbers.
5. To email or print the Pre-booked Items report, enter 1 for the **Version** (1,a) field, press <Field Exit>, press <Enter>, and enter data as necessary for the following fields:
- **Customer #** (6,n) - a customer's number. Users can press <F4> to select a customer from the Select Customer Master screen.
 - **Cust Coll #** (5,n) - a customer collection number. Users can press <F4> to create and select a collection from the Select Customer Coll screen. Refer to Working With Customer Collections of the Customer File Maintenance document for additional information about creating a collection.
 - **Salesman #** (6,a) - a sales representative's employee code. Users can press <F4> to select a code from the Select Employee Master screen.
 - **Corporate #** (6,n) - a corporate customer's number. Users can press <F4> to select a number from the Select Corporate Master screen.
 - **Email Reports** (1,a) - enter *Y* to email the report.
 - **Include Online?** (1,a) - enter *Y* to include the pre-booked items that currently appear as "live" orders on the Work With Orders screens.
 - **Include Remote?** (1,a) - enter *Y* to include the pre-booked items that were exported, but do not yet appear as "live" orders.
6. Press <F6> (Print), and press <Enter> to confirm. The Pre-book Reports screen appears.