DAC
User Guide

Customer File Maintenance

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Getting Started

The Customer Related File Maintenance applications are used to create and maintain the following:
- Job titles
- Employee records
- Terms definitions
- Route definitions
- Account types
- Sales group definitions
- Billing matrix definitions
- Retail matrix definitions
- Corporate level definitions
- Demographic areas
- Customer records
- Customer options.

Refer to the Tax System document for information about creating and maintaining:
- State, County and City Codes
- Tax Jurisdictions.

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

```
User: JEANNINE              Menu: FMCV1              Date:  8/07/12

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



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19. Deletions          20.                    21. Reports
22.                    23. Dac Main Menu       90. Sign Off
====================================================================
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==>
```

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

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

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

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

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

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

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


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

Working With Job Titles

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

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

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

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

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

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

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

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

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

Type options, press Enter.
D=Delete request

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












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

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

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


Type options, press Enter.
D=Delete request

?    Job Id        Job Title














                                                              +

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

5. Enter a unique job title code for the **Job ID** (2,a) field.

6. Enter the job title for the **Job Title** (25,a) field.

7. Continue entering job title codes and job titles as necessary, and press <Enter> when data entry is complete.

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


Type options, press Enter.
D=Delete request

?    Job Id        Job Title
     BY     Buyer












                                                              +

F3=Exit    F9=Go to 'Change' mode
                                              CONFIRM: Y (Y/N)
```
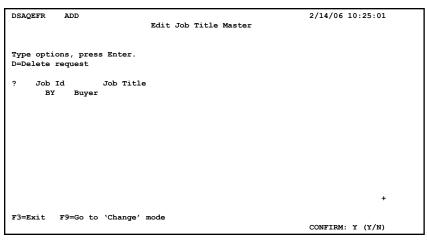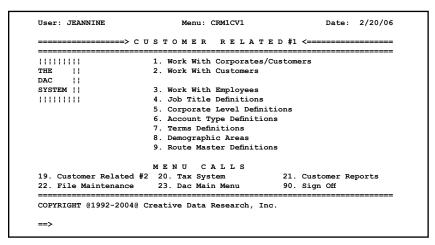
8. Press <Enter> when prompted to confirm. The Edit Job Title Master screen is cleared.

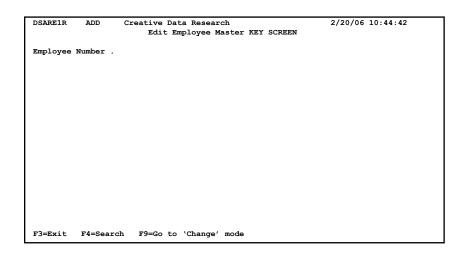9. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Employee Records

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

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

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

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

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

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

3. Select Option 3 (Work With Employees) from the Customer Related #1 screen. The Work With Employee Record screen appears with a list of employee records if any were previously defined.

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

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

  Employee Number .




















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

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

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

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

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

Email 1
Email 2




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

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

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

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

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

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

Email 1
Email 2




F3=Exit   F4=Search   F12=Key screen
                                               CONFIRM: Y (Y/N)
```

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

9. Continue adding employee records, or press <F3> to exit. The Work With
   Employee Record screen appears.

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

Working With Terms Definitions

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

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

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

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

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

1. Select option 7 (Terms Definitions) from the Customer Related #1 screen. The Edit Terms Descriptions screen appears.

2. If necessary, press <F9> (go to 'Add' mode) to add new records.

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


Type options, press Enter.
D=Delete request

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










                                                                        +


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

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

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

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

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

Type options, press Enter.
D=Delete request

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




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

4. If aging is based on terms, enter the number of days in which payment must be received before the customer (or the distributor) is considered past due for the **Age Days** (3,n) field. If *N* (for no) is entered for the **Term based A/R Aging** field of the SYS005 default system option, invoice dates and not the value of the **Age Days** field, are used for aging.
Refer to the DAC Default System Options document for additional information about the SYS005 default system option (Accounting Options). Refer to Working With Accounts Receivable Reports and Working With Statements of the Accounts Receivable document for information about the Aged Trial Balance report, Account Aging Analysis report and customer statements.

5. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:
   • Optional: **Cash Disc %** (5.2,n) - the payment discount percentage received.
   • Optional: **Disc Days** (3,n) field - the number of days within which payment must be received from the customer or by the vendor to qualify for a payment discount.
   • Optional: **Late Days** (3,n) - the number of days in which payment must be received before late charges can be generated for a customer. Refer to the Accounts Receivable document for information about late charges. No value is necessary for the **Late Days** field when the payment terms record is used for vendors.

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

7. Press <Enter> when prompted to confirm.

8. If necessary, press <F9> to display the previously entered payment terms records.

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

Working With Route Definitions

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

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

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

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

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

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

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

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

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

```
DSXXDFR    DISPLAY Creative Data Research               5/05/06 17:36:45
                          Work With Routes
   Route Description              Route   Driver  Salesman  Route
                                  Number                    Type


Type options, press Enter.
2=Edit Record

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






F3=Exit   F10=Add New Record
```

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

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

  Route Number .









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

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

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

  Route Number . . . . . . . :   301

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

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

  Type . . . . . . .
  Current Vehicle  .



F3=Exit    F11=Delete
```

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

- **Route Description** (30,a) - description of the route.

- Optional: **Driver** (6,a) - employee code of the driver for the route. If necessary, press <F4> to select a code from the Select Employee Master screen.

- Optional: **Salesman** (6,a) - employee code of the salesman for the route. If necessary, press <F4> to select a code from the Select Employee Master screen.

- Optional: **Status Day 1 - Status Day 7** (1,a) - are provided for informational purposes only, and to represent Monday through Sunday, respectively. Enter *Y* for yes to designate the day(s) of the week that the route is used. The default value of these fields is *N* for no.

- **Type** (1,a) - enter *D* for deliveries or *S* for sales calls, or leave the field blank to designate that the route is used for both.

- Optional: **Current Vehicle** (6,a) - code designating the vehicle used for the route.

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

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

Route Number . . . . . . :    301

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

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

Type . . . . . . .   D
Current Vehicle  .


F3=Exit    F11=Delete
                                                    CONFIRM: Y (Y/N)
```

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

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

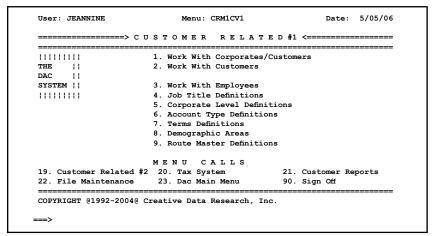10. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Account Types

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

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

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

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

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

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

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

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

3. Select option 6 (Account Type Definitions) from the Customer Related #1 screen. The Edit Customer Type screen appears with a list of account type records if any were previously defined.

4. If account type records exist, press <F9> (Go to 'Add' mode).

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


Type options, press Enter.
D=Delete request

?  Account    Account Type                   Account Type Message
   Type       Description








                                                                    +

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

5. Enter a unique account type code for the **Account Type** (4,a) field.

6. Enter a description of the account type for the **Account Type Description** (30,a) field.

7. If the account type record will be used to print a message on customer invoices, enter the message text for the **Account Type Message** (30,a) field. The value entered will be the default value of the **Special Message 3** field of the Change Order Information screen.

8. Continue entering account type records as necessary, and press <Enter> when data entry is complete.

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


Type options, press Enter.
D=Delete request

?  Account    Account Type                   Account Type Message
   Type       Description
   CNDY       CANDY CUSTOMERS
   DRUG       DRUG STORES                    Check Our Full Line Of HBA
   TOB        TOBACCO OUTLET                 CIGARETTE COUNT _____   DRIVER
   TX         TEXAS CUSTOMERS




                                                                    +

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

9. Press <Enter> when prompted to confirm. The Edit Account Type screen is cleared.

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

Working With Sales Group Definitions

Sales groups can be used to group customers together for:

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

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

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

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

3. Select option 19 (Customer Related #2) from the Customer Related #1 screen. The Customer Related #2 screen appears.

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

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



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

4. Select option 3 (Sales Group Master Definitions) from the Customer Related #2 screen. The Edit Sales Group Master screen appears with a list of sales group records if any were previously defined.

5. If sales group records exist, press <F9> (Go to 'Add' mode).

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


Type options, press Enter.
D=Delete request

?  Sales Group  Sales Group
   Number       Description










                                                                    +

F3=Exit    F9=Go to 'Change' mode
```
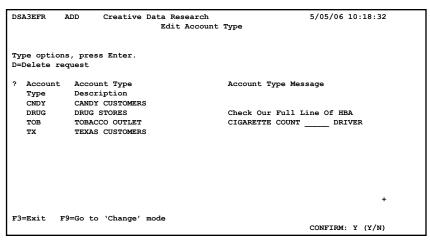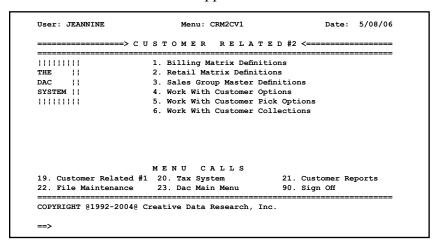
6. Enter a unique sales group code for the **Sales Group Number** (6,a) field.

7. Enter a description of the sales group for the **Sales Group Description** (30,a) field.

8. Continue entering sales group records as necessary, and press <Enter> when data entry is complete.

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


Type options, press Enter.
D=Delete request

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







                                                                    +

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

9. Press <Enter> when prompted to confirm. The Edit Sales Group Master screen is cleared.

10. Press <F3> to exit. The Customer Related #2 screen appears.

Working With Billing Matrix Definitions

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

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

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

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

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

3. Select option 19 (Customer Related #2) from the Customer Related #1 screen. The Customer Related #2 screen appears.

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

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




                          M E N U   C A L L S
           19. Customer Related #1  20. Tax System          21. Customer Reports
           22. File Maintenance      23. Dac Main Menu       90. Sign Off
           ======================================================================
           COPYRIGHT @1992-2004@ Creative Data Research, Inc.

           ===>
```

4. Select option 1 (Billing Matrix Definitions) from the Customer Related #2 screen. The Edit Billing Matrix Master screen appears with a list of billing matrix records if any were previously defined.

5. If billing matrix records exist, press <F9> (Go to 'Add' mode).

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


Type options, press Enter.
D=Delete request

?   Billing   Billing Matrix Desc.
    Matrix




                                                              +

F3=Exit    F9=Go to 'Change' mode
```
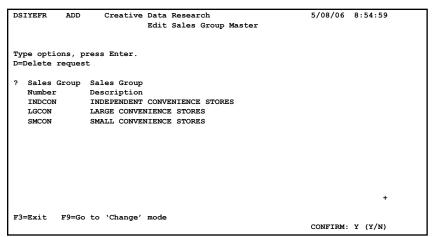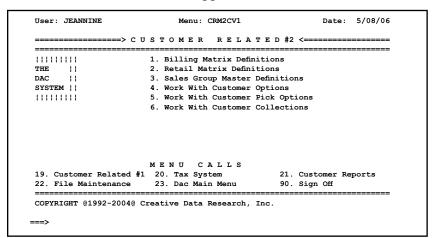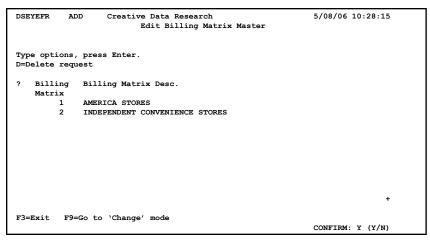
6. Enter a unique number for the **Billing Matrix** (6,n) field.

7. Enter a description of the customer group for the **Billing Matrix Desc** (30,a) field.

8. Continue entering billing matrix records as necessary, and press <Enter> when data entry is complete.

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


Type options, press Enter.
D=Delete request

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




                                                              +

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

9. Press <Enter> when prompted to confirm. The Edit Billing Matrix Master screen is cleared.

10. Press <F3> to exit. The Customer Related #2 screen appears.

Working With Retail Matrix Definitions

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

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

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

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

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

3. Select option 19 (Customer Related #2) from the Customer Related #1 screen. The Customer Related #2 screen appears.

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

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




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

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

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

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


Type options, press Enter.
D=Delete request

?   Retail    Retail Matrix Desc.
    Matrix












                                                            +

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

6. Enter a unique number for the **Retail Matrix** (6,n) field.

7. Enter a description of the customer group for the **Retail Matrix Desc** (30,a) field.

8. Continue entering retail matrix records as necessary, and press <Enter> when data entry is complete.

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


Type options, press Enter.
D=Delete request

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









                                                            +

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

9. Press <Enter> when prompted to confirm. The Edit Retail Matrix Master screen is cleared.

10. Press <F3> to exit. The Customer Related #2 screen appears.

Working With Corporate Level Definitions

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

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

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

3. Select Option 5 (Corporate Level Definitions) from the Customer Related #1 screen. The Edit Level Description screen appears with a list of corporate level descriptions if any were previously defined.

4. If corporate level descriptions were previously defined, press <F9> (Go to 'Add' mode).

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


Type options, press Enter.
D=Delete request

?  Level      Level Description
   Code








                                                                    +

F3=Exit    F9=Go to 'Change' mode
```
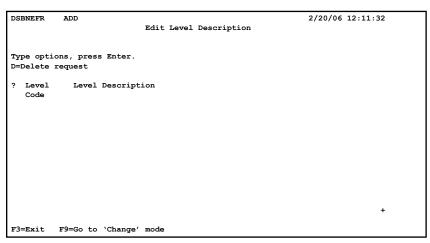
5. Enter a unique code for the **Level Code** (1,a) field.

6. Enter the description for the **Level Description** (25,a) field.

7. Continue entering level codes and descriptions as necessary, and press <Enter> when data entry is complete.

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


Type options, press Enter.
D=Delete request

?  Level      Level Description
   Code
     1      Headquarters
     2      Division
     3      Branch






                                                                    +


F3=Exit   F9=Go to 'Change' mode
                                                     CONFIRM: Y (Y/N)
```
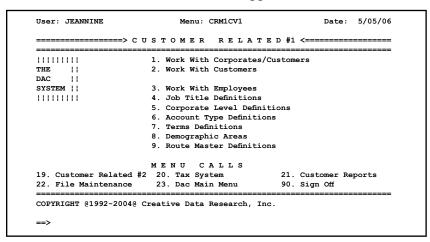
8. Press <Enter> when prompted to confirm. The Edit Level Description screen is cleared.

9. Press <F3> to exit. The Customer Related #1 screen appears.
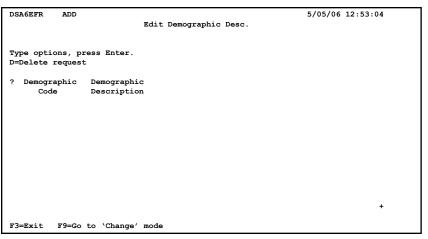
Working With Demographic Areas

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

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

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

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

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

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

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

3. Select option 8 (Demographic Areas) from the Customer Related #1 screen. The Edit Demographic Desc screen appears with a list of demographic records if any were previously defined.

4. If demographic records exist, press <F9> (Go to 'Add' mode).

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


Type options, press Enter.
D=Delete request

?  Demographic   Demographic
      Code          Description









                                                             +

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

5. Enter a unique demographic code for the **Demographic Code** (4,a) field.

6. Enter a description of the demographic area for the **Demographic Description** (30,a) field.

7. Continue entering demographic records as necessary, and press <Enter> when data entry is complete.

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


Type options, press Enter.
D=Delete request

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





                                                             +

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

8. Press <Enter> when prompted to confirm. The Edit Demographic Desc screen is cleared.

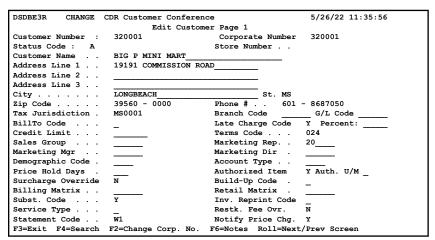9. Press <F3> to exit. The Customer Related #1 screen appears.

Working With Customers

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

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

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

Phone no. ___  - _____    Inter Dialing . . .   ___
Fax Phone ___  - _____    Account Rep Sales .   _____  Statement Code  __
Dataline  ___  - _____    Account Rep A/R . .   _____  Password _____
          Corporate Contacts            Corporate Titles
1 _____  1 _____
2 _____  2 _____
3 _____  3 _____
4 _____  4 _____
5 _____  5 _____
Email _____  _____
Email _____  _____

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

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

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

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

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

Inter Dialing   ____   Fax Phone  601 - 4658999   Dataline Phone  ___ - _____
Store Classification(WAM)  .  ____   Include For USG Reporting?      _
Federal Tax Id    10-3838837_____   State Tax Id . . . .   _____
Cigarette License _____   Tobacco License  . .   635188276_____
License 3 . . .   _____   Tax Group _ Password . . . . .  _____
Retail Labels? . . .    _            Allowance Based Retail . .   Y
Frequent Mailing List _              Exclude From Allowances? .   _
Invoice Trailer Report N             QDN Customer Number      _____
Customer Start Date   _32607         Exclude From Promos?     _
MSA Customer Classification: R       MSA Promotion Acceptance?    Y
Exclude Auto Merge Orders  _         Cash & Carry Customer? . .  _
F3=Exit  F24=Extended Information   Roll=Next/Prev Screen
```

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

      Customer Number  . :   320001    BIG P MINI MART

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

      Delivery Route 1 . .   _____      Delivery Sequence 1 . .   _____
      Delivery Route 2 . .   200___      Delivery Sequence 2 . .   ____5
      Delivery Route 3 . .   _____      Delivery Sequence 3 . .   _____
      Delivery Route 4 . .   _____      Delivery Sequence 4 . .   _____
      Delivery Route 5 . .   _____      Delivery Sequence 5 . .   _____
      Delivery Route 6 . .   _____      Delivery Sequence 6 . .   _____
      Delivery Route 7 . .   _____      Delivery Sequence 7 . .   _____

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

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

Customer Number  :   320001    BIG P MINI MART




    Order Day 1 .   Y         Order Time 1 .   ___12:00
    Order Day 2 .   _         Order Time 2 .   _____
    Order Day 3 .   _         Order Time 3 .   _____
    Order Day 4 .   _         Order Time 4 .   _____
    Order Day 5 .   _         Order Time 5 .   _____
    Order Day 6 .   _         Order Time 6 .   _____
    Order Day 7 .   _         Order Time 7 .   _____






F3=Exit
```

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

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

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

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

- Individual Customer - a customer whose "bill to" address is not the same as that of any other customer. For these customers, records are created by:
    1. Adding a customer corporate record to the Customer Corporate Master file containing "bill to" information for the customer, then
    2. Adding a customer record to the Customer Master file which contains other customer-specific information.

- Chain Customer - a customer whose "bill to" address is the same as that of other customers, such as those of a corporate chain. For a chain of customers, records are created by:
    1. Adding a single customer corporate record to the Customer Corporate Master file that contains the "bill to" information which is shared by all the customers of the chain, then
    2. Adding a customer record *for each customer* to the Customer Master file which contains the customer-specific information for each.

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

The data for which user entry is not required in order to add a customer record is labeled as "Optional" in the instructions which follow. As noted in the instructions, some of the required data may be "entered" by system default, and no user entry is necessary.
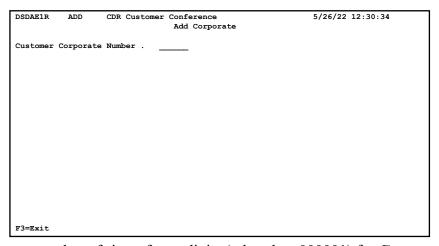
Data entry worksheets are included, following the instructions below, to facilitate data entry. Refer to Copying Customer Records for information about duplicating customer records.

Adding Customer Records

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

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

```
User: JEANNINE              Menu: CRM1CV1              Date:  5/26/22

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

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

3. Select option 1 (Work With Corporates/Customers) from the Customer Related #1 screen. The Display Corporate by Name screen appears.

4. Press <F10> (Enter new record). The Add Corporate screen appears.

```
DSDAE1R    ADD     CDR Customer Conference          5/26/22 12:30:34
                         Add Corporate

Customer Corporate Number .   _____









F3=Exit
```

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

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

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

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

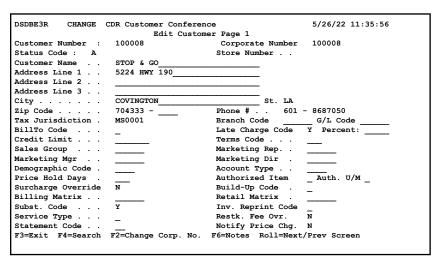6. Press <Enter>. The Add Corporate screen is redisplayed with the customer's corporate number as previously entered.

```
DSDAE1R     ADD      CDR Customer Conference              5/26/22 11:53:12
                              Add Corporate
Customer Corp #: 100008                      Corporate Type .   _
                                             Controlled By Corp #  _____
  Name   . .  _____   Level Code _
  Addr 1  .  _____   Branch Code .   _____
  Addr 2  .  _____
  Addr 3  .  _____   Country Code  ___
  City  . .  _____   State  __  Zip  _____  -  ____

  Phone no.  ___  -  _____   Inter Dialing . . .   ___
  Fax Phone  ___  -  _____   Account Rep Sales .  _____  Statement Code  __
  Dataline   ___  -  _____   Account Rep A/R . .  _____  Password _____
           Corporate Contacts               Corporate Titles
  1  _____  1  _____
  2  _____  2  _____
  3  _____  3  _____
  4  _____  4  _____
  5  _____  5  _____
  Email  _____  _____
  Email  _____  _____

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

7. Enter *I* for **Corporate Type** (1,a) to designate an individual customer.

8. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:
   • Optional: **Controlled By Corporate #** (6,n) - a customer corporate number previously defined by the user. If necessary, press <F4> to select a customer corporate number from the Select Corporate Master screen. This data is not required for using DAC directly, but could be used (with the IBM Query utility) to produce reports concerning a corporation's hierarchical structure.

   • Optional: **Level Code** (1,a) - a corporate level code previously defined by the user. If necessary, press <F4> to select a level code from the Select Level Description screen. This data is not required for using DAC directly, but could be used (with the IBM Query utility) to produce reports concerning a corporation's hierarchical structure.

   • **Name** (35,a) - the company name which is printed on invoices and statements with the billing address.

   • Optional: **Branch Code** (6,a) - a warehouse code previously defined with option 3 (Warehouse Definitions) of the Product Related screen. If *YES* is entered for the **Use Branch Code For Whse** field of the SYS001 default system option, the warehouse code entered for **Branch Code** will be the default value of the **Default Warehouse** field when adding a customer order.

- **Addr 1** (30,a) - street number and street name of the customer's billing address which is printed on invoices and statements.

- Optional: **Addr 2 - Addr 3** (30,a) - the remaining portion of the customer's billing address, such as post office box number, which is printed on invoices and statements.

- Optional: **Country Code** (3,a) - the country in which the customer's office is located

- **City** (30,a) - the city of the customer's billing address.

- **State** (2,a) - the state of the customer's billing address.

- **Zip** (5-9,n) - the zip code and 4-digit extension of the customer's billing address. Entering a value for the **Zip** field is only required if *YES* is entered for the **Make Zip Code Required** field of the SYS001 default system option. Refer to the DAC Default System Options document for additional information.

- Optional: **Phone no** (10,n) - the customer's area code and telephone number.

- Optional: **Inter Dialing** (3,n) - the 3-digit code required for international calling.

- Optional: **Fax Phone** (10,n) - the customer's area code and telephone number for fax transmission.

- Optional: **Account Rep Sales** (6,a) - the employee code of the sales representative assigned to the customer's account. If necessary, press <F4> to select an employee code from the Select Employee Master screen. This field is used for printing Aged Trial Balance reports. Refer to Printing Aged Trial Balance Reports of the Accounts Receivable document for additional information.

- Optional: **Statement Code** (2,a) - a one or two-digit alphanumeric value used to print a single batch of statements for a group of customers. For example, it may designate the day of the week on which the customer's statement is printed, such as *TU* for Tuesday. Refer to the Accounts Receivable document for information about printing statements by statement code.

- Optional: **Dataline** (10,n) - the customer's area code and telephone number for data transmission.

- Optional: **Account Rep A/R** (6,a) - the employee code of the accounts receivable representative as previously defined by the user with option 3 (Work With Employees) of the Customer Related #1 screen. If necessary, press <F4> to select an employee code from the Select Employee Master

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

- Optional: **Password** (8,a) - the customer corporate level password for using Web Console, an optional module of DAC. Refer to the **Password** field of the Edit Customer Page 2 screen below for information about the customer level password.

- Optional: **Corporate Contacts 1** (30,a) - the customer employee's name which is printed on invoices and statements with the billing address.

- Optional: **Corporate Contacts 2 - Corporate Contacts 5** (30,a) - the names of other customer employees with whom the user communicates.

- Optional: **Corporate Titles 1 - Corporate Titles 5** (30,a) - the job titles of the customer's employees designated as **Corporate Contacts 1 - Corporate Contacts 5**.

- Optional: **Email** - one or two addresses can be used for sending velocity reports, pre-book notifications and price change notifications to customers if outbound email functionality is enabled on the distributor's system. Refer to Working With Document Distribution Records of the System File Maintenance document for additional information.

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

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

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

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

11. Enter data for the following fields, as necessary, and press <Field Exit> after each
    entry:
    • Displayed field: **Status Code** (1,a) - the customer status code is *A* for active
      when the user first creates the customer's record. It may be changed to *D* for
      delete and *I* for inactive. Refer to Deleting Customer Records and Changing
      Customer Status for additional information.

    • Optional: **Store Number** (6,n) - the customer's store number may be used
      for entering daily transactions associated with accounts receivable. Refer
      to Working With A/R Batches of the Accounts Receivable document for
      additional information. A different value must be entered for the **Store
      Number** field of each record of a chain of customers.

    • **Customer Name** (35,a) - the company name which is printed on invoices with
      the shipping address.

    • Optional: **Address Line 1 - Address Line 3** (30,a) - the customer's shipping
      address which is printed on invoices.
      If the user participates in reporting programs, such as PMStars, the street
      address must be entered for the **Address Line 1** field. Additional address
      information, such as a contact's name, should be entered for the **Address Line
      2** and **Address Line 3** fields. Refer to Working With Unitrac of the Item File
      Maintenance document for additional information.

    • **City** (30,a) - the city of the customer's shipping address.

    • **St** (2,a) - the state of the customer's shipping address.

    • **Zip Code** (5-9,n) - the zip code and 4-digit extension of the customer's
      shipping address. Entering a value for the **Zip Code** field is only required if
      YES is entered for the **Make Zip Code Required** field of the SYS001 default
      system option. Refer to the DAC Default System Options document for
      additional information.

    • Optional: **Phone #** (10,n) - the customer's area code and telephone number.

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

- **Tax Jurisdiction** (6,a) - a tax jurisdiction code. If necessary, press <F4> to select a tax jurisdiction code from the Select Tax Jurisdiction screen. Refer to the Tax System document for additional information.

- Optional: **BillTo Code** (1,a) - *S* is entered to designate that the customer's name and shipping address can be used for billing, and that the primary contact entered for the **Contacts 1** field (see below), can also be printed on invoices and statements. The value of *Y* must also be entered for the **Use Bill-To Code** field of the SYS036 default system option in order to print the customer's shipping address on invoices and statements.
  If **BillTo Code** is left blank, the customer's name, billing address and primary contact, as entered for the customer corporate record, is used for billing.

- Optional: **Credit Limit** (7,n) - the maximum amount of credit extended to the customer. The *Customer Is Over Their Credit Limit* message will appear on the screen when the user begins to enter an order for a customer who exceeded the credit limit with a previous order. A warning message also appears on the Upload Summary report during remote order entry.
  If **YES* is entered for the **Hold Orders For Over Credit Limit?** field of the SYS036 default system option, users cannot print pick lists (or other pick documents), and cannot print invoices after entering an order for a customer who exceeded their credit limit. Refer to the DAC Default System Options document for additional information.
  Credit limit warnings will not be issued unless *Y* is entered for the **A/R Verification** field for the user's option record. Refer to Working With User Options of the Billing File Maintenance document for additional information.

- Optional: **Sales Group** (6,a) - a sales group code previously defined by the user. If necessary, press <F4> to select a sales group code from the Select Sales Group Master screen. This field can be used for printing the Weekly Sales Recap and the Customer Profitability Analysis reports. Refer to Working With Sales Group Definitions above for additional information.

- Optional: **Marketing Mgr** (6,a) - the employee code of the marketing manager. If necessary, press <F4> to select an employee code from the Select

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

- Optional: **Demographic Code** (4,a) - a demographic area code previously defined by the user. If necessary, press <F4> to select a code from the Select Demographic Code screen. This field is used for enrolling customers in vendor deals. Refer to the Vendor Receivables document for additional information.

- Optional: **Price Hold Days** (3,n) - designates the number of days that will elapse before a price change takes effect for the customer when *Y* is entered for the **Hold** field of the price change record. If the **Price Hold Days** field is left blank, or *N* is entered for the **Hold** field of the price change records, price changes take effect immediately. Refer to Working With Price Maintenance of the Item File Maintenance document for additional information.

- Optional: **Surcharge Override** (1,a) **-** *Y* for yes to exclude this customer from surcharges for ordering eaches when this unit of measure is not the item's standard selling unit of measure (**Standard U/M**). If left blank, the default value of **Surcharge Override** is *N* for no. Refer to Entering Surcharges and Discounts of the Item File Maintenance document for additional information.

- Optional: **Billing Matrix** (6,n) - a billing matrix number previously defined by the user. If necessary, press <F4> to select a billing matrix number from the Select Billing Matrix screen. Refer to Working With Billing Matrix Contracts of the Billing File Maintenance document for additional information.

- Optional: **Subst. Code** (1,a) **-** *Y* designates that the customer will receive out-of-stock and forced item substitutions, and *X* designates that the customer will receive neither type of substitution. If the **Subst Code** field is blank, or its value is *N*, the customer will receive only forced item substitutions. The default value of this field is *Y*. Refer to Adding Item Records of the Item File Maintenance document for information about the **Substitute Item** and **Type** fields of the item record.

- Optional: **Service Type** (1,a) **-** *F* designates that this is the record of a full service customer, and *M* designates maintenance. This data is not required for using DAC directly, but could be used (with the IBM Query utility) to produce reports.

- Optional: **Statement Code** (2,a) - a one or two-digit alphanumeric value used to print a single batch of statements for a group of customers. For example, it may designate the day of the week on which the customer's statement is printed, such as *TU* for Tuesday. Refer to the Accounts Receivable document for information about printing statements by statement code.

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

- Optional: **Branch Code** (6,a) - a warehouse code previously defined with option 3 (Warehouse Definitions) of the Product Related screen. If *YES* is entered for the **Use Branch Code For Whse** field of the SYS001 default system option, the warehouse code entered for **Branch Code** will be the default value of the **Default Warehouse** field when adding a customer order.

- Optional: **G/L Code** (6,a) - the General Ledger sales group code used to transfer sales data by cost center to the General Ledger System. If the DAC G/L System or multiple cost centers are not used, leave this field blank. Refer to Working With Interface Records For Sales of the General Ledger document for additional information.

- Optional: **Late Charge Code** (1,a) - *Y* for yes designates that late charges will be levied against the customer for overdue payments. If left blank, the default value of **Late Charge Code** is *Y*. Refer to Working With Late Charges of the Accounts Receivable document for additional information.

- Optional: **Terms Code** (3,a) - a payment terms code previously defined by the user. If necessary, press <F4> to select a payment terms code from the Select Terms Description screen. The *Customer Is Past Due On Terms* message will appear on the screen when the user begins to enter an order for a customer from whom payment is overdue. A warning message also appears on the Upload Summary report during remote order entry.
Past due warnings will not be issued unless *Y* is entered for the **A/R Verification** field for the user's option record. Refer to Working With User Options of the Billing File Maintenance document for additional information.

- **Marketing Rep** (6,a) - the employee code of the sales representative assigned to the customer's account. If necessary, press <F4> to select an employee code from the Select Employee Master screen. This field is required for numerous functions, such as using the Work With Commissions application, and producing salesman-related reports.

- Optional: **Marketing Dir** (6,a) - the employee code of the marketing director as previously defined by the user. If necessary, press <F4> to select an

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

- Optional: **Account Type** (4,a) - a code previously defined by the user. If necessary, press <F4> to select an account type code from the Select Account Type screen. This field can be used, but is not required, for printing a specific message on invoices, and printing velocity reports. Refer to Working With Account Types for additional information.

- Optional: **Authorized Item** (1,a) - *Y* for yes limits the customer to ordering only items that are authorized for purchase, unless this "unauthorized" status is overridden when an order is entered. The default value of **Authorized Item** is *N* for no. Refer to Working With Customer/Item Records of the Billing File Maintenance document for additional information.

- Optional: **Auth. U/M** (1,a) - *Y* for yes designates that a selling unit of measure may be used to limit the ordering of authorized items to a designated unit. Refer to Working With Customer/Item Records of the Billing File Maintenance document for information about the **Normal Buying Unit** field.

- Optional: **Build-Up Code** (1,a) - *Y* for yes indicates that the customer maintains specific quantity levels for some items as designated by the **Build Up Quantity** field of the customer/item record. Refer to Working With Customer/Item Records of the Billing File Maintenance document for additional information.
  Maintaining quantity levels, based on the quantity on hand, is used when placing remote orders with a Telxon unit. Refer to Working With Telxon of the Billing document for additional information.

- Optional: **Retail Matrix** (6,n) - a retail matrix number previously defined by the user. If necessary, press <F4> to select a retail matrix number from the Select Retail Matrix screen. Refer to Working With Retail Contracts of the Billing File Maintenance document for additional information.

- Optional: **Inv. Reprint Code** (1,n) - the number of additional invoices printed (and reprinted) for this customer. Refer to Working With Customer Orders of the Billing document for information about printing and reprinting invoices.

- Optional: **Restk. Fee Ovr.** (1,a) - *Y* for yes to exclude this customer from restocking fees charged for returning items. If left blank, the default value of **Restk Fee Ovr** is *N* for no.

  Refer to Working With Billing Reasons of the Billing File Maintenance document for information about restocking fee calculations.
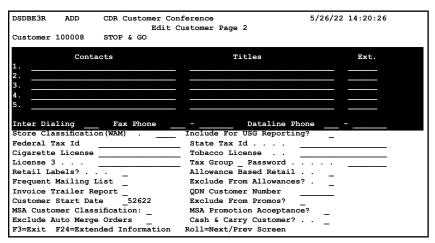
- Optional: **Notify Price Chg.** (1,a) **-** *Y* for yes designates that a notification can be printed when the price of an item which the customer is authorized to purchase is changed by use of the Global Price Changes applications.

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

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

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

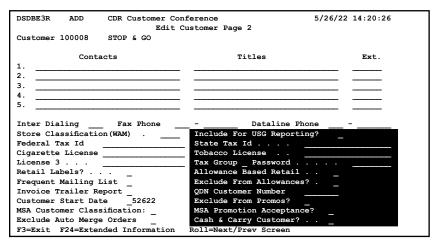12. Press <Page Down> to continue adding data at the Edit Customer Page 2 screen.

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

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

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

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

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

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

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

• Optional: **Store Classification(WAM)** (4,n) - the WAM code designating the customer's classiffication.

• Optional: **Federal Tax Id** (18,a) - the customer's federal tax identification number.

• Optional: **Cigarette License** (18,a) - the customer's cigaette license number. The value of **Cigarette License** appears on all versions of the invoice with the heading *Permit #*. Refer to **Tobacco License** field below concerning the customer's tobacco tax number.

• Optional: **License 3** (18,a) - the customer's license number. The data entered for **License 3** is not required for use by DAC directly, but can be used (with the IBM Query utility) to produce reports.

• Optional: **Retail Labels?** (1,a) - *Y* for yes designates that a retail label batch is created for this customer if the Work With Retail Label Batches application is used to create batches for multiple customers using the same criteria. Refer to the Retail Shelf Labels document for additional information.

• Optional: **Frequent Mailing List** (1,a) - *Y* for yes designates that the customer's address will be included when printing labels for a limited mailing. Refer to Printing Customer Address Labels below for information about the **Mailing List Only** field of the Customer Address Labels screen.

• Optional: **Invoice Trailer Report** (1,a) - *Y* for yes to print a list of unshipped (and shorted) items separately when printing invoices. The default value of **Invoice Trailer Report** is *N* for no. With the exception of invoice version C, the list is printed as a separate file. Refer to Appendix B (Invoice Trailer Report) of the Billing document for additional information.

• Display field: **Customer Start Date** (6,n) - the customer record's entry date.

• Optional: **MSA Customer Classification** (1,a) - *R* for retailer, *D* for distributor and *O* for other designates the customer's classification for

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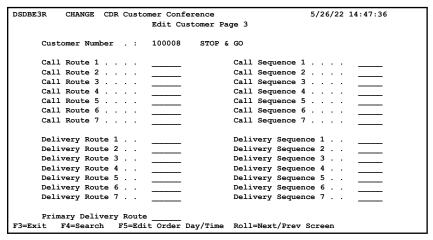
- Optional: **Exclude Auto Merge Orders** (1,a) - *Y* for yes designates that the customer's orders will not be merged if automatic merging is used. Entering a value for the **Exclude Auto Merge Orders** field is only required if **YES* is entered for the **Auto Merge Cust Orders** field of the SYS032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

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

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

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

- Optional: **Include For USG Reporting** (1,a) - *Y* for yes designates that the customer's data will be included in USG reports.

- Optional: **State Tax Id** (18,a) - the customer's state tax identification number.

- Optional: **Tobacco License** (18,a) - the customer's tobacco tax number should be entered for the **Tobacco License** field if it is required before a tobacco item can be ordered by the customer. The tax number can be printed on invoices only if invoice version B is used. Refer to **Cigarette License** and **License 3** fields above for additional information.

- Optional: **Tax Group** (1,a) - the code designating the customer's tax group for use with some state tax reporting.

- Optional: **Password** (8,a) - the customer's password for using Web Console, an optional module of DAC. Refer to the **Password** field of the Edit Corporate screen above for information about the corporate level password.

- Optional: **Allowance Based Retail** (1,a) - *Y* for yes designates that the customer's retail prices should be calculated after selling allowances are deducted. The default value of **Allowance Based Retail** is *N* for no. Refer to Working With Selling Allowances of the Billing File Maintenance document for additional information.

- Optional: **Exclude From Allowances?** (1,a) - *Y* for yes designates that list

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

- Optional: **QDN Customer Number** (6,n) - the number assigned to the customer by Quality Distribution Network. This field will not appear unless *Y* is entered for the **QDN Active** field of the SYS040 default system option.

- Optional: **Exclude From Promos?** (1,a) - *Y* for yes designates that list prices of items which this customer orders are not calculated with salesman promotions. Refer to Working With Salesman Promotions of the Item File Maintenance document for additional information.

- Optional: **MSA Promotion Acceptance?** (1,a) - *N* for no designates that the customer does not accept cigarette promotional items. The value of the field, which defaults to *Y* for yes, is used for cigarette manufacturer reporting. Refer to Working With Unitrac of the Item File Maintenance document for additional information.

- Optional: **Cash & Carry Customer?** (1,a) - *Y* for yes designates that the customer is a cash and carry customer for use with some manufacturer reporting. Refer to Working With Unitrac of the Item File Maintenance document for additional information.

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

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

      Customer Number  . :   100008     STOP & GO

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

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

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

15. Enter data for the following fields, as necessary, and press <Field Exit> after each entry:
    - Optional: **Call Route 1 - Call Route 7** (6,a) - a route code previously defined by the user. If necessary, press <F4> to select a route code from the Select Route Description screen. The **Call Route** fields correspond to the days of

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

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

- Optional: **Call Sequence 1 - Call Sequence 7** (5,n) - represent the customer's place, such as first, second and third, in the course of a sales representative's daily calls. For example, if the customer is the fourth to be visited by the sales rep on Friday, *4* is entered for **Call Sequence 5**.
  The **Call Sequence** fields are used to print customer statements in the order of the sales calls. Note: The **Call Route** fields may be used without entering values for the **Call Sequence** fields.

- Optional: **Delivery Route 1 - Delivery Route 7** (6,a) - a route code previously defined by the user. If necessary, press <F4> to select a route code from the Select Route Description screen. The **Delivery Route** fields correspond to the days of the week, such that **Delivery Route 1** represents Monday, **Delivery Route 2** represents Tuesday, etc.
  The values of these fields are used to print pick lists and invoices. Refer to the Billing document for additional information.

- Optional: **Delivery Sequence 1 - Delivery Sequence 7** (5,n) - represent the customer's place, such as first, second and third, on a delivery route. For example, if the customer is the third stop on Tuesday, *3* is entered for **Delivery Sequence 2**.
  The **Delivery Sequence** fields are used to print pick lists in reverse order for loading trucks, but used to print invoices in ascending order for delivery stops. Note: The **Delivery Route** fields may be used without entering values for the **Delivery Sequence** fields.

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

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

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

Customer Number  :   100008     STOP & GO




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






  F3=Exit
```

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

- The **Order Day 1 - Order Day 7** fields (1,a) represent Monday through Sunday, respectively. Enter *Y* for yes to designate the day(s) of the week that the customer's order is received. The default value of these fields is *N* for no.

- The **Order Time 1 - Order Time 7** fields (6,n) designate the time of day that the customer's order is received, and are provided for informational purposes only. Entering values in military time format, such as *1430* for 2:30 p.m. is recommended.

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

17. If necessary, press <F3> to exit the Edit Order Day/Time screen.

18. Press <Enter> when data entry at the Edit Customer pages is complete.

19. Press <Enter> when prompted to confirm. The Edit Cust From Search KEY SCREEN screen appears with the *Record added* message.

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

Customer Data Worksheets

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

Add Corporate screen

Customer Corporate Number (6,n) _____   Corporate Type (I/C) _____

Controlled By Corp # (6,n) _____

Level Code (1,a) _____

Name (35,a) _____   Branch Code (6,a) _____

Addr 1 (30,a) _____

Addr 2 (30,a) _____

Addr 3 (30,a) _____   Country Code (3,a) _____

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

Phone No (10,n) _____   Inter Dialing (3,n) _____

Fax Phone (10,n) _____   Account Rep Sales (6,a) _____   Statement Code (2,a) _____

Dataline (10,n) _____   Account Rep A/R (6,a) _____   Password (8,a) _____

Corporate Contacts (30,a)   Corporate Titles (30,a)

1. _____   1. _____

2. _____   2. _____

3. _____   3. _____

4. _____   4. _____

5. _____   5. _____

Email (70,a) _____

Email (70,a) _____

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Edit Customer Page 1 screen

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

Store Number (6,n) _____

Customer Name (35,a) _____

Address Line 1 (30,a) _____

Address Line 2 (30,a) _____

Address Line 3 (30,a) _____

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Edit Customer Page 2 screen - *Customer Number* _____

Contacts (30,a)   Titles (30,a)   Ext. (6,n)

1. _____   1. _____   1. _____

2. _____   2. _____   2. _____

3. _____   3. _____   3. _____

4. _____   4. _____   4. _____

5. _____   5. _____   5. _____

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

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

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

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

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

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

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

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

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

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

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

Customer Extended Information screen

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

Address 1 (30,a) _____

Address 2 (30,a) _____

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

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

Primary Email Address (70,a) _____

2nd Email Address (70,a) _____

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

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

Edit Customer Page 3 screen - *Customer Number* _____

Call Routes (6,a)

Monday: Call Route 1 _____

Tuesday: Call Route 2 _____

Wednesday: Call Route 3 _____

Thursday: Call Route 4 _____

Friday: Call Route 5 _____

Saturday: Call Route 6 _____

Sunday: Call Route 7 _____

Call Sequences (5,n)

Call Sequence 1 _____

Call Sequence 2 _____

Call Sequence 3 _____

Call Sequence 4 _____

Call Sequence 5 _____

Call Sequence 6 _____

Call Sequence 7 _____

Delivery Routes (6,a)

Monday: Delivery Route 1 _____

Tuesday: Delivery Route 2 _____

Wednesday: Delivery Route 3 _____

Thursday: Delivery Route 4 _____

Friday: Delivery Route 5 _____

Saturday: Delivery Route 6 _____

Sunday: Delivery Route 7 _____

Primary Delivery Route _____

Delivery Sequences (5,n)

Delivery Sequence 1 _____

Delivery Sequence 2 _____

Delivery Sequence 3 _____

Delivery Sequence 4 _____

Delivery Sequence 5 _____

Delivery Sequence 6 _____

Delivery Sequence 7 _____

Edit Order Day/Time screen

Order Days (Y/N)

Monday: Order Day 1 _____

Tuesday: Order Day 2 _____

Wednesday: Order Day 3 _____

Thursday: Order Day 4 _____

Friday: Order Day 5 _____

Saturday: Order Day 6 _____

Sunday: Order Day 7 _____

Order Times (6,n)

Order Time 1 _____

Order Time 2 _____

Order Time 3 _____

Order Time 4 _____

Order Time 5 _____

Order Time 6 _____

Order Time 7 _____

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Editing Customer Master File Records

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

The following steps describe using the Work With Customers screen to access a customer record that must be changed.
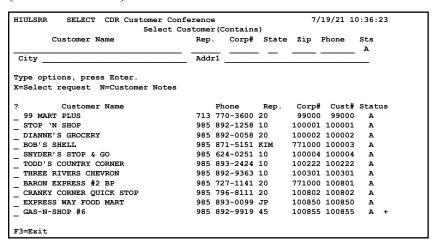
1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.

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

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

```
DISPLAY HWJ7DFR    JEANNINE      CDR Customer Conference                    7/19/21  10:19:05 QPADEV0017
                                    Work With Customers

   Customer Name/Number            City                    Zip   BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
                                                                                                                A
   _____   _____   _____  _____  _____  _____  ____  _____  __  _____  _____

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

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

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

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

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

   • Press <F7> to use the **Owner Name** field of the Display Customer Info screen
     to search for the desired customer. After locating the customer, press <F3> to
     return to the Work With Customers screen.

   • Enter a portion of the customer's name, beginning with the first letter,
     for **Customer Name/Number**, press <Enter> and the list is redisplayed
     beginning with customer names matching the text entered.

   • Use one or more of the restrictor fields at the top of the screen to limit the list
     to include only those customers who have data which precisely matches what
     is entered. For example, by entering a route code of the desired customer for
     Delivery Route, and pressing <Enter>, the list is redisplayed with only those
     customers who are on the specified route.

   • Press <F4> to redisplay the customers in the Select Customer (Contains)
     screen, and use one or more of the restrictor fields at the top of the screen
     (illustrated below) to locate the desired customer.

```
HIULSRR    SELECT  CDR Customer Conference                7/19/21 10:36:23
                          Select Customer(Contains)
          Customer Name                  Rep.   Corp#  State  Zip  Phone   Sts
 _____       _____    __    ____  _____    A
  City _____  Addr1 _____

 Type options, press Enter.
 X=Select request  N=Customer Notes

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

 F3=Exit
```

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

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

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

F2 (Change Corp. No.) - allows users to change **Corporate Number** which is used to access the customer's "ship to" information.

F3 (Exit) - returns user to the previous screen.

F4 (Search) - provides customer-related assistance for entering and changing the customer's tax jurisdiction, branch code, terms code, sales group, marketing representative, marketing manager, marketing director, demographic code, billing matrix and retail matrix. Before pressing <F4>, the cursor must be located at the field, such as **Tax Jurisdiction**, for which assistance is desired.

F6 (Notes) - allows users to add notes concerning the customer. Refer to Adding Customer Notes for additional information.

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

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

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

Inter Dialing     ___   Fax Phone   601 - 4658999   Dataline Phone  ___ - _____
Store Classification(WAM) .    ____   Include For USG Reporting?  _
Federal Tax Id     10-3838837_____  State Tax Id . . . .  _____
Cigarette License _____  Tobacco License  . .  635188276_____
License 3 . . . .  _____  Tax Group _ Password . . . . .  _____
Retail Labels? . . .   _              Allowance Based Retail . .  Y
Frequent Mailing List _               Exclude From Allowances? .  Y
Invoice Trailer Report N              QDN Customer Number    _____
Customer Start Date   _32607          Exclude From Promos?   _
MSA Customer Classification: R        MSA Promotion Acceptance?   Y
Exclude Auto Merge Orders   _         Cash & Carry Customer? . .  _
F3=Exit  F24=Extended Information   Roll=Next/Prev Screen
```

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

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

    Refer to Working With Document Distribution Records of the System File Maintenance document for information about using customer email addresses for remote order confirmations, and emailing velocity reports, pre-book notifications, price change notifications, invoices and more.
    If changes are made to the fields of the Customer Extended Information screen, press <Enter> when done, and again when prompted to confirm.

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

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

       Customer Number  . :    320001     BIG P MINI MART

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

       Delivery Route 1 . .    _____          Delivery Sequence 1 . .    _____
       Delivery Route 2 . .    200___          Delivery Sequence 2 . .    ____5
       Delivery Route 3 . .    _____          Delivery Sequence 3 . .    _____
       Delivery Route 4 . .    _____          Delivery Sequence 4 . .    _____
       Delivery Route 5 . .    _____          Delivery Sequence 5 . .    _____
       Delivery Route 6 . .    _____          Delivery Sequence 6 . .    _____
       Delivery Route 7 . .    _____          Delivery Sequence 7 . .    _____

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

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

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

 Customer Number  :    320001     BIG P MINI MART



       Order Day 1  .    Y         Order Time 1  .    ___14:00
       Order Day 2  .    _         Order Time 2  .    _____
       Order Day 3  .    _         Order Time 3  .    _____
       Order Day 4  .    _         Order Time 4  .    _____
       Order Day 5  .    _         Order Time 5  .    _____
       Order Day 6  .    _         Order Time 6  .    _____
       Order Day 7  .    _         Order Time 7  .    _____




 F3=Exit
```

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

9. Press <Enter> when changes to the Edit Customer pages are complete.

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

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

Customer Number .   320001












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

11. To continue editing customer records, use one of the following methods to access the Edit Customer pages of the desired customer:
    • Enter the customer's number for **Customer Number**, press <Enter>, and the Edit Customer Page 1 screen appears, or
    • Press <F3> for exit, and the Work With Customers screen appears. Note: Delete previous entries for **Customer Name/Number** or restrictor fields of the Work With Customers screen (and press <Enter>) to redisplay its complete list. Repeat the instructions above to locate the desired customer in the screen's list and edit its record.

12. When no other customer records require editing, press <F3> to exit from the Edit Customer screen. The Work With Customers screen appears.

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

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

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

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

```
DSC9DFR    DISPLAY CDR Customer Conference           7/19/21 12:29:31
                        Display Corporate by Name
            Corporate Name                Type   Lvl  Sts
_____           _     _     A

Corp. Number

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

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

F3=Exit    F10=Enter new record
```

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

```
DSC9DFR    DISPLAY CDR Customer Conference           7/19/21 12:40:39
                        Display Corporate by Name
            Corporate Name                Type   Lvl  Sts
_____           C     _     A

Corp. Number

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

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

F3=Exit    F10=Enter new record
```

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

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

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

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




F3=Exit    F10=Enter new record
```
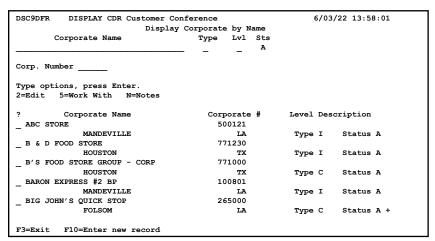
6. Enter *2* (Edit Customer Record) in the selection column next to the customer's
    name and press <Enter>. The Edit Customer Page 1 screen appears. Refer to
    the preceding instructions of this section for information about editing the Edit
    Customer pages.

Editing Customer Corporate Master File Records

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

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

1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen, select option 1 (Customer Related Maintenance) from the File Maintenance screen, and select option 1 (Work With Corporates/Customers) from the Customer Related #1 screen. The Display Corporate by Name screen appears, and displays a list of customers with the status code of *A* for active.
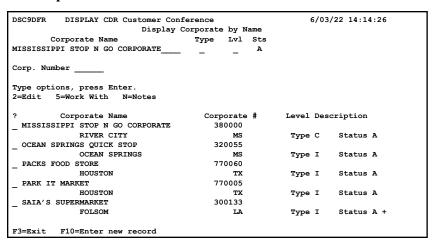
```
DSC9DFR    DISPLAY CDR Customer Conference                 6/03/22 13:58:01
                         Display Corporate by Name
           Corporate Name                 Type   Lvl  Sts
    _____        _      _     A

   Corp. Number _____

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

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

   F3=Exit    F10=Enter new record
```

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

3. Press <Page Down> to locate the desired customer's name in the screen's list, or use one of the following methods:
   - Enter a portion of the customer's name, beginning with the first letter, for **Corporate Name**, press <Enter> and the list is redisplayed beginning with customer names matching the text entered, or
   - Use one or more of the restrictor fields at the top of the screen to limit the list to include only those customers who have data which precisely matches what is entered. In this instance, entering *C* for **Corporate Type**, and pressing <Enter> is recommended.

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

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

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

 Phone no.  601 -  5554443   Inter Dialing  . . .   ___
 Fax Phone   ___  -  _____   Account Rep Sales  .   _____  Statement Code   __
 Dataline    ___  -  _____   Account Rep A/R  . .   DAVID  Password  _____
          Corporate Contacts                Corporate Titles
 1 _____  1  _____
 2 _____  2  _____
 3 _____  3  _____
 4 _____  4  _____
 5 _____  5  _____
 Email  _____
 Email  _____

 F3=Exit    F4=Search
```

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

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

Corp. Number _____

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

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

F3=Exit    F10=Enter new record
```

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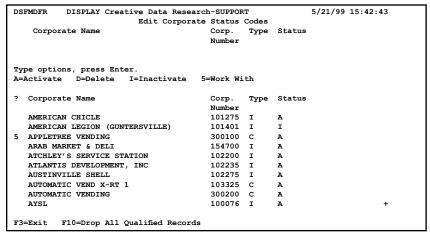
Deleting Customer Records

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

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

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

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

==>
```

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

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


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

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

F3=Exit    F10=Drop All Qualified Records
```

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

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

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

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









 F3=Exit
```

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

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

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

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









 F3=Exit
```

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

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

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

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

 F3=Exit   F10=Drop All Qualified Records
```

6. To delete the record of an individual customer, enter *D* (Delete) in the selection column next to the customer's name, and press <Enter>. The customer status code changes as to *D* (Delete).

7. Press <F10> (Drop All Qualified Records). Records that do not qualify for deletion will maintain the delete request status, and can be removed when they are eligible in the future.
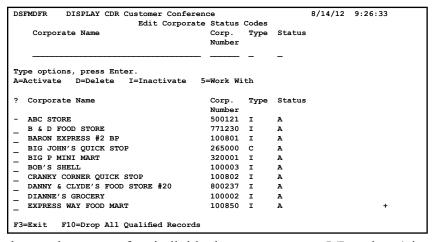
Changing Customer Status

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

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

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

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

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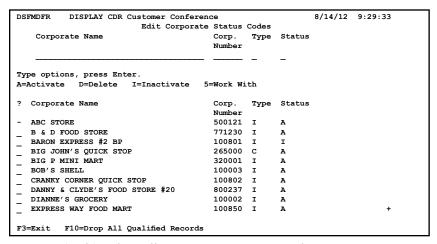
2. Select option 1 (Delete Qualified Customers) from the Deletion Menu screen. The Edit Corporate Status Codes screen appears.

```
DSFMDFR     DISPLAY CDR Customer Conference              8/14/12  9:26:33
                        Edit Corporate Status Codes
     Corporate Name                    Corp.   Type  Status
                                       Number

   _____   _____  _     _

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

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

 F3=Exit   F10=Drop All Qualified Records
```

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

```
DSFMDFR     DISPLAY CDR Customer Conference              8/14/12  9:27:39
                      Edit Corporate Status Codes
       Corporate Name                    Corp.   Type  Status
                                         Number

       _____ _____  _     _

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

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

F3=Exit    F10=Drop All Qualified Records
```

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

```
DSFMDFR     DISPLAY CDR Customer Conference              8/14/12  9:29:33
                      Edit Corporate Status Codes
       Corporate Name                    Corp.   Type  Status
                                         Number

       _____ _____  _     _

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

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

F3=Exit    F10=Drop All Qualified Records
```

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

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

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

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

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




F3=Exit
```
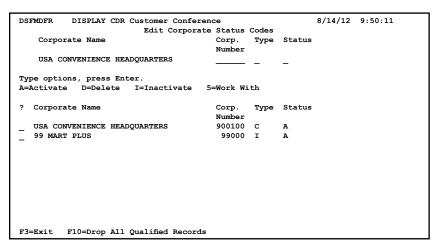
7. Enter *I* (Inactivate) in the selection column next to the customer's name.

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

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

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




 F3=Exit
```

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

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

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

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




 F3=Exit
```

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

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

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

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





 F3=Exit   F10=Drop All Qualified Records
```

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

Copying Customer Records

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

The following steps describe using the Work With Customers screen to add new customer records by copying previously added records.
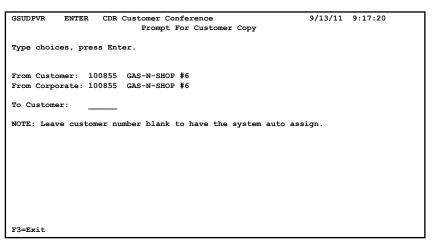
1. Select option 1 (File Maintenance Menu) from the Main Operations Menu screen. The File Maintenance screen appears.

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

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

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

  Customer Name/Number            City                    Zip   BMatrix RMatrix SlsRep Type Route ST SlsGrp Sts  Whs
  _____         _____         _____ _____   _____  _____ ____ _____ __ _____     A  _____

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

F3=Exit  F4=Search  F7=Search By Owner F16=Extended Restrictors
```
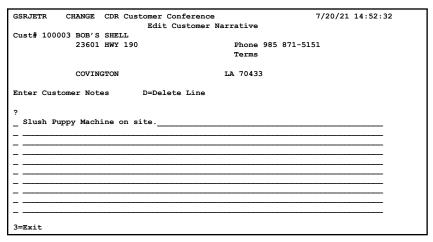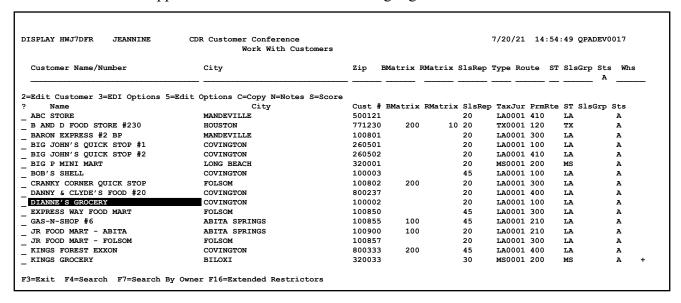
4. After locating the desired customer in screen's list, enter *C* (Copy) in the selection column next to the customer's name.

```
DISPLAY HWJ7DFR    JEANNINE      CDR Customer Conference                    7/19/21  17:46:47 QPADEV0016
                                   Work With Customers

   Customer Name/Number            City                Zip   BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
   LIL_____     _____   _____ _____ _____ _____ ____ _____  __  A     _____

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

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

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

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

   Type choices, press Enter.


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

   To Customer:      _____

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










   F3=Exit
```

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

7. Press <Enter>.

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

Adding Customer Notes

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

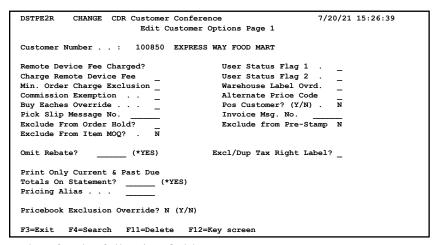2. Select option 1 (Customer Related Maintenance) from the File Maintenance screen. The Customer Related #1 screen appears.

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

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

   Customer Name/Number              City                  Zip   BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
                                                                                                               A
   _____  _____  _____  _____  _____  _____  ____  _____  __  _____  __  _____

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

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

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

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

   Customer Name/Number              City                  Zip   BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
                                                                                                               A
   _____  _____  _____  _____  _____  _____  ____  _____  __  _____  __  _____

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

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

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

```
GSRJETR     CHANGE  CDR Customer Conference                 7/20/21 14:52:32
                            Edit Customer Narrative
Cust# 100003 BOB'S SHELL
             23601 HWY 190                    Phone 985 871-5151
                                              Terms

             COVINGTON                        LA 70433

Enter Customer Notes       D=Delete Line

    ?
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____

    3=Exit
```

6. Enter the customer's notes.

```
GSRJETR     CHANGE  CDR Customer Conference                 7/20/21 14:52:32
                            Edit Customer Narrative
Cust# 100003 BOB'S SHELL
             23601 HWY 190                    Phone 985 871-5151
                                              Terms

             COVINGTON                        LA 70433

Enter Customer Notes       D=Delete Line

    ?
    _ Slush Puppy Machine on site._____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____
    _ _____

    3=Exit
```

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

8. Press <Enter> when prompted to confirm. The Work With Customers screen
appears with the customer's name highlighted.

```
DISPLAY HWJ7DFR     JEANNINE     CDR Customer Conference              7/20/21  14:54:49 QPADEV0017
                                 Work With Customers

    Customer Name/Number              City            Zip  BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
    _____              _____    ____ _____ _____ _____ ____ _____  __ _____  A  _____

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

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

Working With Customer Options

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

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

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

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

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

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

                             M E N U   C A L L S
         19. Customer Related #2  20. Tax System          21. Customer Reports
         22. File Maintenance     23. Dac Main Menu        90. Sign Off
         =================================================================
         COPYRIGHT @1992-2004@ Creative Data Research, Inc.

         ===>
```

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

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

   Customer Name/Number              City              Zip   BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
   _____       _____ _____ _____ _____ _____ ___ _____  __ _____    A   _____

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

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

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

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

   Customer Name/Number          City                     Zip  BMatrix RMatrix SlsRep Type Route  ST SlsGrp Sts  Whs
                                                                                                         A
   _____    _____    _____  _____  _____  _____  ____  ____  ___ _____  ___  _____

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

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

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

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

    Customer Number . . :   100850  EXPRESS WAY FOOD MART

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

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

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

    Pricebook Exclusion Override? N (Y/N)

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

4. Enter data for the following fields as necessary:
   • **Remote Device Fee Charged?** (1,a) - this display field remains blank until *Y* is entered by the system when a remote order is transmitted for the customer. The *Y* value is cleared during end of week processing.

   • **Charge Remote Device Fee** (1,a) - *Y* designates that the customer is charged a weekly remote device fee. Refer to Working With Remote Orders of the Billing document for additional information.

   • **Min. Order Charge Exclusion** (1,a) - *Y* designates that the customer is exempt from minimum order charges. Exceptions can be made for specific orders by entering *Y* for the **Exempt M.O.C.?** field of the Change Order Information screen when entering a customer's order. Refer to Working With Minimum Order Charges of the Billing File Maintenance document for additional information.

- **Commission Exemption** (1,a) - *Y* designates that commissions are not calculated for orders from the customer. Refer to Working With Commissions of the Billing File Maintenance document for additional information.

- **Buy Eaches Override** (1,a) - *Y* designates that the customer is allowed to order an item at a selling level, usually eaches, specified as conditional in the item's record. Refer to Working With Items of the Item File Maintenance document for information about the **Sell1 - Sell4** fields of item records.

- **Pick Slip Message No.** (1,n) - the value entered designates a pick message for printing at the top of the customer's pick lists. Refer to Defining Form Messages of the Billing File Maintenance document for information about the **Message Number** field, and using the *PIC* application code for the **App code** field of form messages.

- **Exclude From Order Hold?** (1,a) - *Y* designates that the printing of pick lists (or other pick documents) and invoices is not be prohibited for the customer when *Y* is entered for the **Hold Orders For Over Credit Limit?** field or the **Hold Orders If Past Due?** field of the SYS036 default system option. Refer to DAC Default System Options document for additional information.

- **Exclude From Item MOQ?** (1,a) - *Y* designates that the customer can order less than the minimum order quantity specified in item records. Refer to Adding Items Records of the Item File Maintenance document for information about the **MOQ1 - MOQ4** fields.

- **Omit Rebate?** (4,a) - **YES* designates that the customer is excluded from receiving rebates. Refer to Working With Rebates of the Billing File Maintenance document for additional information.

- **Print Only Current & Past Due Totals On Statement?** (4,a) - **YES* designates that only current and past due invoice totals are printed on statements. If **NO* is entered, all invoice totals are printed.

- Optional: **Pricing Alias** (6,n) - this field is not used by DAC directly.

- Optional: **User Status Flag 1** (1,a) - this field is not used by DAC directly.

- Optional: **User Status Flag 2** (1,a) - this field is not used by DAC directly.

- **Warehouse Label Ovrd.** (1,a) - this field is no longer used by DAC due to system upgrades.

- **Alternate Price Code** (1,n) - an alternate price code designating the alternate prices (list price, base cost or MSRP) used by the customer. Refer to Entering Alternate Prices of the Item File Maintenance document for additional information.

- **POS Customer?** (1,a) - this field is no longer used by DAC due to system upgrades.

- **Invoice Msg. No.** (6,n) - a message number designating a customer-specific message to be printed on invoices. Refer to Defining Form Messages of the Billing File Maintenance document for information about the **Message Number** field, and using the *CIM* application code for the **App code** field of form messages.

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

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

Customer Number . . :   100850   EXPRESS WAY FOOD MART

Remote Device Fee Charged?              User Status Flag 1  .   _
Charge Remote Device Fee       _        User Status Flag 2  .   _
Min. Order Charge Exclusion _           Warehouse Label Ovrd.   _
Commission Exemption  . .      _        Alternate Price Code    _
Buy Eaches Override . . .      _        Pos Customer? (Y/N) .   N
Pick Slip Message No.  ___999           Invoice Msg. No.      _____
Exclude From Order Hold?       _        Exclude from Pre-Stamp  N
Exclude From Item MOQ?  .      N

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

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

Pricebook Exclusion Override? N (Y/N)

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

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

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

Customer Number .   100850


















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

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

Working With Customer Collections

Customer Collections are used to group customers together for a variety of purposes including, but not limited to:

- Printing three column order books for multiple customers. Refer to the Order Books document for additional information.
- Enrolling multiple customers in vendor deals, and printing a Deal Activity Recap report. Refer to the Vendor Receivables document for additional information.
- Copying pre-book orders. Refer to the Pre-book Orders document for additional information.
- Printing velocity reports. Refer to Printing A Velocity Report below.
- Printing customer price books. Refer to Printing A Customer Price Book below.

```
User: JEANNINE                Menu: CRM1CV1              Date:  1/24/14

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

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

1. Select Option 19 (Customer Related #2) from the Customer Related #1 screen. The Customer Related #2 screen appears.

```
User: JEANNINE                Menu: CRM2CV1              Date:  1/24/14

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


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

2. Select option 6 (With With Customer Collections) from the Customer Related

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

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


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

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











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

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

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

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

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










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

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

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

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

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










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

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

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

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

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

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

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




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

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

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

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

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

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




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

7. To remove all the customers, except those marked *PERMANENT*, from the collection, press <F8> (Remove ALL Customers), enter *Y* when the *Are you sure you want to remove all customers?* message appears, and press <Enter>.

8. To delete the entire collection, press <F11> (Delete Collection), enter *Y* when the *Are you sure you want to delete this collection?* message appears, and press <Enter>.

9. Press <F3> to exit. The Work With Customer Collections screen appears.

Working With Customer Delivery Messages

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

Working With Customer Reports

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

Printing A Customer Corporate Master File Changes Report

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

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

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

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

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

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




                Corporate Number

                Beginning Date .     50806
                Ending Date  . .     50806









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

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

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

Customer Corporate Master File Changes

| Creative Data Research-SUPPORT | Print File Maintenance | JTIPPIN | DSCOPFR | 8/15/99 17:09:08 Page | 1 |

File Name-:

Key of Record	Key Description	Field Name	Before Change	After Change	Date of Change	User Id
100035	ABC	Corporate Zip		74458	7/22/99	JTIPPIN
100035	ABC	Corporate Zip		36420	7/22/99	JTIPPIN
100035	ABC	Corporate Area Code	000	800	7/22/99	JTIPPIN
100035	ABC	Corporate Area Code	000	800	7/22/99	JTIPPIN
100035	ABC	Corporate Phone	0000000	8488514	7/22/99	JTIPPIN
100035	ABC	Corporate Phone	0000000	8488514	7/22/99	JTIPPIN
100035	ABC	Corporate Name		ABC	7/22/99	JTIPPIN
100035	ABC	Corporate Name		ABC	7/22/99	JTIPPIN
100035	ABC	Corporate Addr 1		P.O. BOX 46	7/22/99	JTIPPIN
100035	ABC	Corporate Addr 1		P.O. BOX 46	7/22/99	JTIPPIN
100035	ABC	Corporate Type		I	7/22/99	JTIPPIN
100035	ABC	Corporate Type		I	7/22/99	JTIPPIN
100035	ABC	Corporate City		LULING	7/22/99	JTIPPIN
100035	ABC	Corporate City		LULING	7/22/99	JTIPPIN
100035	ABC	Level Code		S	7/22/99	JTIPPIN
100035	ABC	Level Code		S	7/22/99	JTIPPIN
100035	ABC	Corporate State		LA	7/22/99	JTIPPIN
100035	ABC	Corporate State		MS	7/22/99	JTIPPIN
100035	ABC	Corporate Country Code		USA	7/22/99	JTIPPIN
100035	ABC	Corporate Country Code		USA	7/22/99	JTIPPIN
100035	ABC	Corporate Contact 1		JAMES SMITH	7/22/99	JTIPPIN
100035	ABC	Corporate Contact 1		JAMES SMITH	7/22/99	JTIPPIN
100035	ABC	Corporate Title 1		PARTNER	7/22/99	JTIPPIN
100035	ABC	Corporate Title 1		PARTNER	7/22/99	JTIPPIN
100035	ABC	Corporate Status		A	7/22/99	JTIPPIN
100035	ABC	Corporate Status		A	7/22/99	JTIPPIN
100035	ABC	Account Rep Sales Employe		01	7/22/99	JTIPPIN
100035	ABC	Account Rep Sales Employe		01	7/22/99	JTIPPIN

** END OF REPORT **

Printing A Customer Master File Changes Report

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

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

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

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

1. Select option 2 (Customer Master Changes) from the Customer Reports screen. The Display Maintenance screen appears.

2. Press <F6> (Print Changes). The Print Customer Change screen appears.

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




            Customer Number

            Beginning date .    50806
            Ending date  . .    50806








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

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

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

Customer Master File Changes

File Name-:

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

** END OF REPORT **

Purging File Changes

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

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

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

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

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

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




                 File Name . . .

                 Beginning Date     50806
                 Ending Date . .    50806









   F3=Exit    F4=Search
```

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

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


 Type options, press Enter.
 X=Select request

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





   F3=Exit
```

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

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




                    File Name . . .     DSABREP       Customer Master

                    Beginning Date      50806
                    Ending Date . .     50806







F3=Exit    F4=Search
```

4. Enter dates for the **Beginning Date** and **Ending Date** fields to limit purging to change records created during a particular range of dates.

5. Press <Enter>.

6. Press <Enter> when prompted to confirm. The Customer Reports screen appears.

Printing Customer Address Labels

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

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

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

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

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

```
CDR WHOLESALE DISTRIBUTION
205 E LOCKWOOD STREET


COVINGTION              LA 70433 2827



USA CONVENIENCE STORE #300
25800 HWY 190


COVINGTON               LA  70433
```

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

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

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

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

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

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

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




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

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

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

                Selection      Criteria:

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

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

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

designate the desired customers, and continue with step 8 or 9 as necessary.
- **Customer Number** (6,n) - a customer number to print a label for a single customer. If necessary, press <F4> to select a number from the Select Customer Master screen.
- **Customer Corporate Number** (6,n) - a customer corporate number to print a label for each customer of a corporate chain. If necessary, press <F4> to select a number from the Select Corporate Master screen.
- **Billing Matrix Number** (6,n) - a billing matrix number to print labels for all the customers of the designated billing matrix. If necessary, press <F4> to select a number from the Select Billing Matrix screen.
- **Retail Matrix Number** (6,n) - a retail matrix number to print labels for all the customers of the designated retail matrix. If necessary, press <F4> to select a number from the Select Retail Matrix screen.
- **Customer Collection** (6,n) - a customer collection number to print labels for all the customers of the designated collection. If necessary, press <F4> to select a number from the Work With Customer Collections screen.

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

               Selection        Criteria:


                                      Beginning Salesman    _____
                                      Ending Salesman  :    _____


                                      Customer Collection   _____



                                      Mailing List Code . . . :   Y

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

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

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

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

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

6. If format 4 is used, enter values for the following fields as necessary:
   - **Beginning State** and **Ending State** (2,a) - enter a range of state abbreviations to limit label printing to the customers of the designated state.
   - **Ship or Bill Addr. (S/B)** (1,a) field - enter *S* or *B* to print the customer's "ship to" address or "bill to" address, respectively, on the labels.
   - **Number of Copies** (2,n) - enter any number between *1* and *99* to designate how many labels are printed.

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

8. If format 1 is used, enter values for the following fields:
   - **Return Address To Print?** (1,a) - enter *Y* (yes) to print the distributor's return address on the labels.
   - **Number of Copies** (2,n) - enter any number between *1* and *99* to designate how many labels are printed.
   - **Address Labl Format** (1,a) - enter *1*.

9. If format 2 or 5 is used, enter values for the following fields:
   - **Number of Copies** (2,n) - enter any number between *1* and *99* to designate how many labels are printed.

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

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

Printing A Customer Address List

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

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

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

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

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

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


Type options, press Enter.


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

 F3=Exit   F6=Print
```

2. If necessary, enter the employee code of the desired marketing director for the **Marketing Dir** (6,a) field.

3. If necessary, enter the employee code of the desired marketing manager for the **Marketing Mgr** (6,a) field.

4. If necessary, enter the employee code of the desired sales representative for the **Marketing Rep** (6,a) field.

5. Press <F6> (Print).

6. Press <F3> to exit. The Customer Reports screen appears.

Customer Address List

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

** END OF REPORT **

Printing A Corporate Address List

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

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

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

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

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

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


Type options, press Enter.


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

F3=Exit   F6=Print
```

2. If necessary, enter the employee code of the desired accounts receivable representative for the **A/R Rep** (6,a) field.

3. If necessary, enter the employee code of the desired account sales representative for the **Account Rep** (6,a) field.

4. Press <F6> (Print).

5. Press <F3> to exit. The Customer Reports screen appears.

Corporate Address Listing

```
Creative Data Research              Corporate Address Listing        KAREN      DSFKPFR    11/16/92 10:38:55 Page     1

Corp.   A/R    Sales  Corporate Name                 Address 1                  Address 2                      Sts
Number  Rep.   Rep.   Address 3                      City                       State,Zip,Telephone

200229  44444  10     CDR CONVENIENCE                1150 LOVER'S LANE          P.O. BOX 8989                    A
                                                     MANDEVILLE                 LA  70448 -        504 - 6268408

200232  200002 10     SUPER SPECIAL STORES           777 WISHFUL THINKING DRIVE                                  A
                                                     BATON ROUGE                LA  70808 -        504 - 9287637

200233  200002 10     SUPER SPECIAL STORES MAIN OFFICE 1000 MAIN STREET         CORNER OF MAIN & ELM             A
                                                     NEW ORLEANS                LA  70145 -        504 - 5259090

200217  200002 10     THE VERY BEST CORP             123 HERE                                                    A
                                                     MADISONVILLE               LA  70448 - 1230   504 - 8453333

** END OF REPORT **
```

Printing A Corporate Chain Address List

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

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

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

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

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

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


Type options, press Enter.
7=Print

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







F3=Exit
```

2. Enter *7* (Print) in the selection column next to the desired corporate customer.

3. Press <Enter> to print.

4. Press <F3> to exit. The Customer Reports screen appears.

Corporate Chain Address List

```
Creative Data Research-SUPPORT        Corp Chain Addr. Listing        JTIPPIN    DSFVPFR    8/15/99 18:37:16 Page    1

Corp.   A/R    Sales   Corporate Name              Address 1                    Address 2                        Sts
Number  Rep.   Rep.    Address 3                   City                         State,Zip,Telephone

300800  504    02      SEASIDE FOOD MARKETS                                     P.O. BOX 233                      A
                                                   HUNTSVILLE                    AL  35801 -      205 - 5391362

        Customer Name               Customer City           State   Zip   Code   Salesman   Cust.    Phone   Number
                                                                                  Number     Number
        PANTRY NOTIONS NO. 1        POPLARVILLE             MS     74125 -        02         181130   225 - 6554110
        PANTRY NOTIONS NO. 2        TUPELO                  MS     85522 -        02         181131   933 - 4557801
        PANTRY NOTIONS NO. 3        WIGGINS                 MS     88369 -        02         181140   996 - 4112580
        PANTRY NOTIONS NO. 4        CROSS ROADS             MS     74558 -        02         181141   445 - 5556332
        SHELBURG DISTRIBUTORS       MANDEVILLE              LA     70458 -        02         181011   504 - 9887441
        SHELL CREEK HIGH SCHOOL     WIGGINS                 MS     74896 -        02         173530   601 - 6554477
        SHELL CREEK PRIMARY         POPLARVILLE             MS     54789 -        02         173525   601 - 7789965
        SHELL CREEK SECONDARY       TUPELO                  MS     78965 -        02         173521   601 - 8445898
        SHELL CREEK WHOLESALE       JACKSON                 MS     65877 -        02         172801   604 - 4458745
        SHELTERS GROCER             MERIDIAN                MS     65891 -        02         172800   601 - 5552236
        SHELTON ENTERPRISES         COVINGTON               LA     45878 -        02         181010   504 - 8396655


** END OF REPORT **
```

Printing A Sales Call Route List

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

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

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

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

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

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


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


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

                         Salesman Number      (Blank for All)


                         Report Version       ( 1 or 2 )


F3=Exit    F6=Print
```

2. Enter *Y* in the selection column next to the desired call route days.

3. If necessary, enter the employee code of a sales representative for the **Salesman Number** (6,a) field.

4. Enter *1* or *2* for the **Report Version** (1,n) field to designate the desired report version (see examples below).

5. Press <F6> (Print).

6. Press <Enter> when prompted to confirm.

Sales Call Route List (Report Version 1)

```
Creative Data Research-SUPPORT    Call Route 1 Listing    JTIPPIN    DSWVPFR    8/15/99 18:58:49 Page    1

Customer #    Customer Name            Address Line 1            City/State       Zip   Area/Phone  Seq#

Route 702    SLSMN 02 TUESDAY

                    Salesman:  JAMES PATTON

180830 SHELL STATION NO. 8      P.O. BOX 788              LUBBOCK        TX 47896 908 6993699   10
180831 SHELL STATION NO. 9      5490 HWY 23 WEST          HOUSTON        TX 78965 809 9632589   10
180970 PANTRY NEEDS NO. 2       455 HWY. 22               AUSTIN         TX 74102 966 3998741   20
180971 PANTRY NEEDS NO. 3       3344 HWY 44               LUBBOCK        TX 74558 822 7442233   20
180950 PANTRON QUICK STOP       5556 BRIDE STREET         HATTIESBURG    MS 74122 855 7448547   30
180951 PANTRY NEEDS NO. 1       2233 HWY. 12              WAVELAND       MS 12369 811 5554788   30
173301 SHELL STATION NO. 20     6611 JACKSON STREET       BOGALUSA       LA 74589 504 6889874   40
173301 SHELL STATION NO. 21     222 WEST MINSTRAL STREET  MERIDIAN       MS 78965 601 5698745   40
173000 SHELL STATION NO. 15     8745 TEXAS DRIVE          KENNER         LA 78965 504 7441212   50
173001 SHELL STATION NO. 16     5400 WASHINGTON STREET    NEW ORLEANS    LA 70458 504 8996688   50
180821 SHELL STATION NO. 7      9900 HWY 81 WEST          AUSTIN LLE     TX 74158 801 8745896   60
180825 SHELL STATION NO. 6      5533 ROSE STREET          NATCHEZ        MS 89654 601 6654785   60

** END OF REPORT **
```

Sales Call Route List (Report Version 2)

```
Creative Data Research-SUPPORT    Call Route Listing    JTIPPIN    GSH8PFR    8/15/99 18:59:05 Page    1

Customer #    Customer Name            Address Line 1            City/State       Zip   Area/Phone  Matrix  Route  Seq.   License 1

Salesman 02    JAMES PATTON

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

** END OF REPORT **
```

Printing A Delivery Route List

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

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

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

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

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

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


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


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


                Beginning Route

                Ending Route
                Report Version        ( 1 or 2 )


F3=Exit    F6=Print
```

2. Enter *Y* in the selection column next to the desired delivery route days.

3. If necessary, enter a route code for the **Beginning Route** and **Ending Route** (6,a) fields.

4. Enter *1* for the **Report Version** (1,n) field.

5. Press <F6> (Print).

6. Press <Enter> when prompted to confirm.

Delivery Route List

```
Creative Data Research-SUPPORT    Delivery Route 1 Listing    JTIPPIN    DSXEPFR    8/17/99 16:57:22 Page    1

Cust.     Name                       Address Line 1                     City                            Phone           Stop

Route 1 201    TRUCK #1 TUESDAY

100035  ABC                          P.O. BOX 44                        LULING              MS 800 8481234       1
107300  BILTON GAS                   444 DAN STREET                     METAIRIE            LA 504 8811330       2
121745  DISCOUNT SERVICES            2145 WEST 10TH STREET              JACKSON             MS 956 2365897      50
100075  AIRLINE ROAD TEXACO          601 AIRLINE ROAD                   NEW ORLEANS         LA 205 8813452      60
121765  DISCOUNT QUICK STOP          2145 EAST WYOMING STREET           HATTIESBURG         MS 852 6958852      80
153200  MERVIN TOBACCO               6720 LINCOLN STREET                HOUSTON             TX 966 3665874      90
147125  LACEY'S SPRING PHILLIP 66    529 HWY 231 SOUTH                  LACEY'S SPRING      AL 205 8831169     100
147100  LACEMAN INC.                 34821 GRAVEL STREET                KENNER              LA 655 8996523     110
107214  VIDEO DEPOT                  870 HWY. 90 SOUTH                  FRANKLINTON         LA 504 6632201     120
110267  BROAD'S RESTAURANT           1234 AVE. J                        GULFPORT            MS 205 8809494     140
136000  HILLVIEW DISTRIBUTORS        1134 SOUTH HWY 66                  BAYOU BLUE          LA 333 5662354     150
176700  STARBRITE QUICK STOP         51234 HWY. 21 NORTH                NEW ORLEANS         LA 504 5588569     160
120510  DEANIE'S GROCER              657 SYCAMORE DRIVE                 FOLSOM              LA 563 8596321     170
159500  LACEMAN CHEVRON              456 HWY 654                        HOUMA               LA 322 5698741     180
136500  HOXTON ELEMENTARY            677 MADISON AVENUE                 GRAND ISLE          LA 988 3669002     190
136400  LACETON TOBACCO PRODUCTS     490 HWY 95                         HATTIESBURG         MS 522 6332010     200
156050  MORGAN'S INC.                2190 HWY. 25 SOUTH                 HATTIESBURG         MS 633 9637410     210
167000  RAYMOND'S EXXON              778 HWY. 65                        CROSS ROADS         MS 601 5556969     220
114800  CHARTER COMMUNICATIONS       3443 VIRGINIA STREET               FOLSOM              LA 205 8253226     230
178999  TOBERMAN'S TOBACCO           3300 BLAKE BLVD.                   MERIDIAN            MS 601 9557401     240
185755  INTERSTATE 10 SUPER STORE    1103 I-10 EAST                     TYLER               TX 988 7401258     250
160817  PARTY TREAT                  2299 MISSISSIPPI AVE.              SHREVEPORT          LA 445 6347720     280
101780  JOHNNEY'S EXXON              3245 SOUTH DERBIGNY                BURAS               LA 655 9870203     290
166717  DISCOUNT GROCERS             679 HWY 54 SOUTH                   POPLARVILLE         MS 258 6528974     300
151100  MADISON SHIPYARD             9087 WASHINGTON STREET             TUPELO              MS 522 8965214     310
129800  GLENDALE DISCOUNT            655 MEMORIAL DRIVE                 LUBBOCK             TX 655 9924558     350
116712  COLONIAL PENN                201 CAUSEWAY BLVD.                 MANDEVILLE          LA 205 6281258     360
100540  SPARKTON SHOP                5413 ARIZONA STREET                ALEXANDRIA          LA 504 2236589     380
156215  MOUNTAIN SPRINGS PRIMARY     726 AVE. G                         AUSTIN              TX 855 9633698     390


** END OF REPORT **
```

Printing A Customer List By Sales Representative

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

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

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

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

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

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


 Print Check Digit Y/N Y

Beginning Sales Rep

Ending Sales Rep  .    999999













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

2. Enter *Y* (yes) or *N* (no) for the **Print Check Digit** (1,a) field.

3. If necessary, enter an employee number for the **Beginning Sales Rep** and **Ending Sales Rep** (6,a) fields to limit the list of customers to those assigned to a designated sales representative. Users can press <F4> to select an employee code from the Select Employee Master screen.

4. Press <F6> (Print).

5. Press <F3> to exit. The Customer Reports screen appears.

Customer List By Sales Representative

```
Creative Data Research-SUPPORT        Sales Rep Customer List           JTIPPIN    BSOQPFR     8/17/99 17:18:28 Page     1

   Customer        Name                          City    /    State    Store    Terms      Phone       Last Order   Last Pay
   Number                                                             Number    Code                     Date        Date

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

** END OF REPORT **
```

Printing A Customer Credit Report

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

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

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

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

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

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

Type choices, press Enter.

From Date:
To Date:

From Cust:
To Cust:

   ** OR **

From Corp:
To Corp:

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

2. Enter a range of dates for the **From Date** and **To Date** (6,n) fields to limit the credits which are included in the report.

3. Enter data for one of the following:
    - **From Cust** and **To Cust** (6,n) fields - the desired customer numbers may be entered to limit the report to a group of customers, or a single customer number may be entered to limit the report to one customer. If necessary, press <F4> to select a number from the Select Customer Master screen.
    - **From Corp** and **To Corp** (6,n) fields - the desired corporate numbers may be entered to limit the report to a group of corporate customers, or a single corporate number may be entered to limit the report to one corporate customer.

4. Press <F6> (Print).

5. Press <F3> to exit. The Special Customer Reports screen appears.

Customer Credit Report

```
Creative Data Research              Customer Credit Report          JEANNINE   DCHOPFR   5/08/06 16:36:35 Page    1

Cust #    Name                  Inv. #    Date        Total    Rsn Description             Ctns      Cig Amount

700200 AMERICA'S STORE #103      8060 10/21/03      235.93- A Restock/Apply Fee            7-           172.39-

700200 AMERICA'S STORE #103      8108 11/14/03       41.24- S Shipping Error              12-            41.24-

700200 AMERICA'S STORE #103      8112 11/14/03       41.24- S Shipping Error              12-            41.24-

700200 AMERICA'S STORE #103      8099 11/20/03      595.58- C Customer Refused            20-           565.98-

700200 AMERICA'S STORE #103      8527  3/30/06      299.00- D Damaged                     10-           299.00-

     Totals For: 700200   AMERICA'S STORE #103      1,212.99-                             61-         1,119.85-

Final totals                                        1,212.99-                             61-         1,119.85-

** END OF REPORT **
```

Printing A Customer Price Book

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

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

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

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

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

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

Refer to the following for related information:

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

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

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

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

           ===>
```

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

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

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

                             M E N U   C A L L S
        19.                 20. Customer Reports      21.
        22.                 23. Dac Main Menu          90. Sign Off
        =======================================================================
        COPYRIGHT @1992-2004@ Creative Data Research, Inc.

           ===>
```

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

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

                       CUSTOMIZED PRICE AND RETAIL LIST

   Customer Number _____
    * OR *
   Cust Collection  _____

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

   Print Book Exclude?  N (Y/N)
   Vendor Number   _____  (Use As A Further Restrictor)
   Item Collection  _____  (Use As A Further Restrictor)
   Use Allowances?  .   N (Y/N)
   Item Selection . .   _ (Press ? For Allowed Values)
   Unit Of Measure    SSU (To Print Price In: SSU, EA., UM1-UM4)
   Job Queue   BOOK_____
   Sort By Custom Cat? N Sort Option For PBI  D (Price Book Index)
   Output Data To File? N (Y/N)            Email Report And/Or File? N (Y/N)
   File Name .   PRICEBK_ .DAT  Folder CV1COM_____
   F3=Exit   F4=Search   F6=Print
```

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

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

   ```
   A CUSTOMER COLLECTION & OUTPUT FILE ARE REQUESTED

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



   F3=Exit
   ```

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

4. Enter data for one of the following fields:
   - **Beginning Class** and **Ending Class** (5,n) - a sales class number, or range of numbers, are entered to designate the items included in the price book. If necessary, press <F4> to select a number from the Select Sales Class Master screen.
   - **Beg Book Head.** and **End Book Head.** (4,a) - a book heading code, or range of codes, are entered to designate the items included in the price book. If necessary, press <F4> to select a number from the Select Book Heading screen. Note: Heading codes are numbers which are entered as alphanumeric characters; therefore, users should enter preceding zeros. For example, *0010* should be entered to designate the number 10.
   - **Beg Prod Class** and **End Prod Class** (5,n) - a product class number, or range of numbers are entered to designate the items included in the price book. If necessary, press <F4> to select a number from the Select Product Class screen.

5. To include the retail amount of the unit of measure designated by the **Unit Of Measure** field (see below), enter *2* for the **Version 1,2** (1,a) field. The **Version 1,2** field only appears if the price book is printed by sales class.

6. To include "book-excluded" items in the price book, enter Y for the **Print Book Exclude?** (1,a) field. Refer to Adding Item Records of the Item File Maintenance document for information about the **Book Exclusion** field of item records.

7. To designate that only items of a specific vendor are included in the price book, enter a vendor code for the **Vendor Number** (6,a) field. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.

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

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

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

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

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

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

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

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

15. To create text data and spreadsheet files for a customer collection, enter data for the following fields:
    - **Output Data To File?** (1,a) - *Y* (yes).
    - **Folder** - name of the folder where the files will be located.

    The text data and spreadsheet files are named CP#s.DAT and CP#s.CSV respectively, where #s is the number of each customer of the collection.

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

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

Customer Price/Retail List By Sales Class - Version 1

```
Creative Data Research            Custom Price/Retail List       JEANNINE   DSRGPFR    9/05/06 10:43:08 Page    1
                                 S P E C I A L   C U S T O M E R   S E R V I C E S
========================================================================================================================
For Class   998 -   998    Price & Retail List For —>  AMERICA'S STORE #102              700100

  Item #        Descripton          UPC Number      Unit MOQ/Rtn Packed   Retail Pk   Full Price/Each Price   Retail   Pct

   Sales Class   998  GROCERY

   172407 BUSH CHILI HOT BEANS 16 OZ            CAN        1 CAN 16 OZ           .45              .90   50.00
   172167 BUSH DK RED KIDNEY BEAN 15 OZ         CAN        1 CAN 15 OZ           .45              .90   50.00
   173690 DM CREAM STYLE CORN 17 OZ             CAN        1 CAN 17 OZ           .56             1.12   50.00
   171280 DM CUT GREEN BEANS 16 OZ              CAN        1 CAN 16 OZ           .61             1.22   50.00
   171381 DM FR STYLE GREEN BEANS 16 OZ         CAN        1 CAN 16 OZ           .59             1.18   50.00
   175594 DM PEAS & CARROTS 16 OZ               CAN        1 CAN 16 OZ           .71             1.42   50.00
   176267 DM SPINACH 15 OZ                      CAN        1 CAN 15 OZ           .56             1.12   50.00
   175479 DM SUGAR PEAS 17 OZ                   CAN        1 CAN 17 OZ           .61             1.22   50.00
   173892 DM WHOLE KERNEL CORN 17 OZ            CAN        1 CAN 17 OZ           .55             1.10   50.00
   177410 EL PASO REFRIED BEAN 16 OZ            CAN        1 CAN 16 OZ           .81             1.62   50.00
   174235 FRANKS SAUERKRAUT 14 OZ               CAN        1 CAN 14 OZ           .46              .92   50.00
   174312 FRANKS SAUERKRAUT 32 OZ               CAN        1 CAN 32 OZ          1.07             2.14   50.00
   176584 HUNTS STEWED TOMATOES 14 OZ           CAN        1 CAN 14 OZ           .71             1.42   50.00
   176610 HUNTS TOMATO PASTE 6 OZ               CAN        1 CAN 6 OZ            .40              .80   50.00
   176723 HUNTS TOMATO SAUCE 8 OZ               CAN        1 CAN 8 OZ            .30              .60   50.00
   176545 HUNTS WHOLE TOMATOES 14.5 OZ          CAN        1 CAN 14.5 OZ         .65             1.30   50.00
   172357 J ARC KIDNEY BEANS 15 OZ              CAN        1 CAN 15 OZ           .48              .96   50.00
   175947 LIBBY PUMPKIN 16 OZ                   CAN        1 CAN 16 OZ           .81             1.62   50.00
   171278 RAINBOW CUT GREEN BEAN 16 OZ          CAN        1 CAN 16 OZ           .33              .66   50.00
   175253 RAINBOW SWEET PEAS 16 OZ              CAN        1 CAN 16 OZ           .37              .74   50.00
   173854 RAINBOW WHOLE KERNAL CORN 16 OZ       CAN        1 CAN 16 OZ           .38              .76   50.00
   174603 TV MUSHROOMS PCS/STEMS 4 OZ           CAN        1 CAN 4 OZ            .56             1.12   50.00
   174742 TV MUSHROOMS PCS/STEMS 8 OZ           CAN        1 CAN 8 OZ           1.10             2.20   50.00
   171874 TV SLICED CARROT 16 OZ                CAN        1 CAN 16 OZ           .37              .74   50.00
   175784 TV WHOLE POTATO 16 OZ                 CAN        1 CAN 16 OZ           .43              .86   50.00
   172888 VC PORK & BEANS 16 OZ                 CAN        1 CAN 16 OZ           .53             1.06   50.00
   172902 VC PORK & BEANS 21 OZ                 CAN        1 CAN 21 OZ           .71             1.42   50.00
   174401 VEG-ALL MIXED VEGETABLE 12 OZ         CAN        1 CAN 12 OZ           .58             1.16   50.00

 ** END OF REPORT **
```

Customer Price/Retail List By Sales Class - Version 2

```
Creative Data Research            Custom Price/Retail List3      JEANNINE   GWEKPFR    9/05/06 10:43:14 Page    1
                                 S P E C I A L   C U S T O M E R   S E R V I C E S
========================================================================================================================
For Class   998 -   998    Price & Retail List For —>  AMERICA'S STORE #102              700100

  Item #        Descripton          UPC Number      Unit MOQ/Rtn  Packed  Retail Pk      Full            Each           Pct.
                                                                                     Price  Retail    Price  Retail

   Sales Class   998  GROCERY

   172407 BUSH CHILI HOT BEANS 16 OZ            CAN        1 CAN 16 OZ        .45    .90      .45    .90  50.00
   172167 BUSH DK RED KIDNEY BEAN 15 OZ         CAN        1 CAN 15 OZ        .45    .90      .45    .90  50.00
   173690 DM CREAM STYLE CORN 17 OZ             CAN        1 CAN 17 OZ        .56   1.12      .56   1.12  50.00
   171280 DM CUT GREEN BEANS 16 OZ              CAN        1 CAN 16 OZ        .61   1.22      .61   1.22  50.00
   171381 DM FR STYLE GREEN BEANS 16 OZ         CAN        1 CAN 16 OZ        .59   1.18      .59   1.18  50.00
   175594 DM PEAS & CARROTS 16 OZ               CAN        1 CAN 16 OZ        .71   1.42      .71   1.42  50.00
   176267 DM SPINACH 15 OZ                      CAN        1 CAN 15 OZ        .56   1.12      .56   1.12  50.00
   175479 DM SUGAR PEAS 17 OZ                   CAN        1 CAN 17 OZ        .61   1.22      .61   1.22  50.00
   173892 DM WHOLE KERNEL CORN 17 OZ            CAN        1 CAN 17 OZ        .55   1.10      .55   1.10  50.00
   177410 EL PASO REFRIED BEAN 16 OZ            CAN        1 CAN 16 OZ        .81   1.62      .81   1.62  50.00
   174235 FRANKS SAUERKRAUT 14 OZ               CAN        1 CAN 14 OZ        .46    .92      .46    .92  50.00
   174312 FRANKS SAUERKRAUT 32 OZ               CAN        1 CAN 32 OZ       1.07   2.14     1.07   2.14  50.00
   176584 HUNTS STEWED TOMATOES 14 OZ           CAN        1 CAN 14 OZ        .71   1.42      .71   1.42  50.00
   176610 HUNTS TOMATO PASTE 6 OZ               CAN        1 CAN 6 OZ         .40    .80      .40    .80  50.00
   176723 HUNTS TOMATO SAUCE 8 OZ               CAN        1 CAN 8 OZ         .30    .60      .30    .60  50.00
   176545 HUNTS WHOLE TOMATOES 14.5 OZ          CAN        1 CAN 14.5 OZ      .65   1.30      .65   1.30  50.00
   172357 J ARC KIDNEY BEANS 15 OZ              CAN        1 CAN 15 OZ        .48    .96      .48    .96  50.00
   175947 LIBBY PUMPKIN 16 OZ                   CAN        1 CAN 16 OZ        .81   1.62      .81   1.62  50.00
   171278 RAINBOW CUT GREEN BEAN 16 OZ          CAN        1 CAN 16 OZ        .33    .66      .33    .66  50.00
   175253 RAINBOW SWEET PEAS 16 OZ              CAN        1 CAN 16 OZ        .37    .74      .37    .74  50.00
   173854 RAINBOW WHOLE KERNAL CORN 16 OZ       CAN        1 CAN 16 OZ        .38    .76      .38    .76  50.00
   174603 TV MUSHROOMS PCS/STEMS 4 OZ           CAN        1 CAN 4 OZ         .56   1.12      .56   1.12  50.00
   174742 TV MUSHROOMS PCS/STEMS 8 OZ           CAN        1 CAN 8 OZ        1.10   2.20     1.10   2.20  50.00
   171874 TV SLICED CARROT 16 OZ                CAN        1 CAN 16 OZ        .37    .74      .37    .74  50.00
   175784 TV WHOLE POTATO 16 OZ                 CAN        1 CAN 16 OZ        .43    .86      .43    .86  50.00
   172888 VC PORK & BEANS 16 OZ                 CAN        1 CAN 16 OZ        .53   1.06      .53   1.06  50.00
   172902 VC PORK & BEANS 21 OZ                 CAN        1 CAN 21 OZ        .71   1.42      .71   1.42  50.00
   174401 VEG-ALL MIXED VEGETABLE 12 OZ         CAN        1 CAN 12 OZ        .58   1.16      .58   1.16  50.00

 ** END OF REPORT **
```

Customer Price/Retail List By Book Heading

```
Creative Data Research          Custom Price/Retail List        JEANNINE   GSCNPFR    9/05/06 11:13:49 Page    1
                         S P E C I A L   C U S T O M E R   S E R V I C E S
=================================================================================================================
For Heading 0760 - 0760    Price & Retail List For ——>  AMERICA'S STORE #102              700100

   Item #        Descripton           UPC Number    Unit MOQ/Rtn  Packed    Retail Pk  Full Price  Ea. Price   Retail    Pct

   Product Heading 0760  GROCERIES

   172407 BUSH CHILI HOT BEANS 16 OZ                   CAN          1 CAN 16 OZ            .45                    .90  50.00
   172167 BUSH DK RED KIDNEY BEAN 15 OZ                CAN          1 CAN 15 OZ            .45                    .90  50.00
   173690 DM CREAM STYLE CORN 17 OZ                    CAN          1 CAN 17 OZ            .56                   1.12  50.00
   171280 DM CUT GREEN BEANS 16 OZ                     CAN          1 CAN 16 OZ            .61                   1.22  50.00
   171381 DM FR STYLE GREEN BEANS 16 OZ                CAN          1 CAN 16 OZ            .59                   1.18  50.00
   175594 DM PEAS & CARROTS 16 OZ                      CAN          1 CAN 16 OZ            .71                   1.42  50.00
   176267 DM SPINACH 15 OZ                             CAN          1 CAN 15 OZ            .56                   1.12  50.00
   175479 DM SUGAR PEAS 17 OZ                          CAN          1 CAN 17 OZ            .61                   1.22  50.00
   173892 DM WHOLE KERNEL CORN 17 OZ                   CAN          1 CAN 17 OZ            .55                   1.10  50.00
   177410 EL PASO REFRIED BEAN 16 OZ                   CAN          1 CAN 16 OZ            .81                   1.62  50.00
   174235 FRANKS SAUERKRAUT 14 OZ                      CAN          1 CAN 14 OZ            .46                    .92  50.00
   174312 FRANKS SAUERKRAUT 32 OZ                      CAN          1 CAN 32 OZ           1.07                   2.14  50.00
   176584 HUNTS STEWED TOMATOES 14 OZ                  CAN          1 CAN 14 OZ            .71                   1.42  50.00
   176610 HUNTS TOMATO PASTE 6 OZ                      CAN          1 CAN 6 OZ             .40                    .80  50.00
   176723 HUNTS TOMATO SAUCE 8 OZ                      CAN          1 CAN 8 OZ             .30                    .60  50.00
   176545 HUNTS WHOLE TOMATOES 14.5 OZ                 CAN          1 CAN 14.5 OZ          .65                   1.30  50.00
   172357 J ARC KIDNEY BEANS 15 OZ                     CAN          1 CAN 15 OZ            .48                    .96  50.00
   175947 LIBBY PUMPKIN 16 OZ                          CAN          1 CAN 16 OZ            .81                   1.62  50.00
   171278 RAINBOW CUT GREEN BEAN 16 OZ                 CAN          1 CAN 16 OZ            .33                    .66  50.00
   175253 RAINBOW SWEET PEAS 16 OZ                     CAN          1 CAN 16 OZ            .37                    .74  50.00
   173854 RAINBOW WHOLE KERNAL CORN 16 OZ              CAN          1 CAN 16 OZ            .38                    .76  50.00
   174603 TV MUSHROOMS PCS/STEMS 4 OZ                  CAN          1 CAN 4 OZ             .56                   1.12  50.00
   174742 TV MUSHROOMS PCS/STEMS 8 OZ                  CAN          1 CAN 8 OZ            1.10                   2.20  50.00
   171874 TV SLICED CARROT 16 OZ                       CAN          1 CAN 16 OZ            .37                    .74  50.00
   175784 TV WHOLE POTATO 16 OZ                        CAN          1 CAN 16 OZ            .43                    .86  50.00
   172888 VC PORK & BEANS 16 OZ                        CAN          1 CAN 16 OZ            .53                   1.06  50.00
   172902 VC PORK & BEANS 21 OZ                        CAN          1 CAN 21 OZ            .71                   1.42  50.00

** END OF REPORT **
```

Adjusting UPCs Before Printing

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

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

2. Select option 3 (Billing Related Maintenance) from the File Maintenance screen. The Billing File Maintenance #1 screen appears.

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

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

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

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

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

Type options, press Enter.
2=Edit Record

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

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

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

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

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


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

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

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

Type choices, press Enter.

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

For UPC with Length of . . .   ___

Drop First . . . . . . . . .   ___
Drop Last  . . . . . . . . .   ___

Leading Zeros to Append 1-3    ___

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




F3=Exit
```

7. Enter data for the following fields as necessary, and press <Field Exit> after each
   entry:
   - **For UPC with Length of** (2,n) - enter a length of *15* or less to designate
     which UPC numbers are changed.
   - **Drop First** (1,n) - enter *1*, *2*, or *3* to designate how many leading digits of the
     changed UPC numbers are not printed.
   - **Drop Last** (1,n) - enter *1*, *2*, or *3* to designate how many ending digits of the
     changed UPC numbers are not printed.
   - **Leading Zeros to Append 1-3** (1,n) - enter *1*, *2*, or *3* to designate how many
     leading zeros are added to the UPC numbers that are changed.

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

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

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

Printing An Authorized Item List

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

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

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

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

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

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


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


    Customer Number _____










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

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

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


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



     Customer Number 100002









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

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

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


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



     Customer Number 100002   DIANNE'S GROCERY








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

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

Authorized Item List

Item Number	Item Description	Build Up Quantity	Last Purchase	Normal Buy Unit	Authorization Flag

Customer 100002 DIANNE'S GROCERY

Category 1 CIGARETTES

Item Number	Item Description	Build Up Quantity	Last Purchase	Normal Buy Unit	Authorization Flag
131200	BEST VALUE MENT 100 LT	0	2/18/13	2 CTN	3 Authorized/Print In Book
100500	CAMEL FILTER 85 BOX	0	8/12/13	2 CTN	3 Authorized/Print In Book
125800	DORAL FF MENT 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
108300	B&H MENT 100 LT.	0	8/12/13	2 CTN	3 Authorized/Print In Book
118800	VANTAGE MENT 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
101300	CARLTON MENTHL	0	8/12/13	2 CTN	3 Authorized/Print In Book
131761	BASIC FF 100 BOX	0	8/12/13	2 CTN	3 Authorized/Print In Book
130585	GPC 100 ULTRA BOX	0	8/12/13	2 CTN	3 Authorized/Print In Book
111700	KOOL MENT 100 MILD	0	8/12/13	2 CTN	3 Authorized/Print In Book
102811	LIGGETT SELECT FF MENTH BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
102815	LIGGETT SELECT ULTRA 100 BX	0	8/12/13	2 CTN	3 Authorized/Print In Book
113200	MARLBORO GOLD BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
115401	PALL MALL 100 BOX	0	8/12/13	2 CTN	3 Authorized/Print In Book
119526	VIRGINIA SLIM SILVER MEN BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
120200	WINSTON 100 LIGHT	0	8/12/13	2 CTN	3 Authorized/Print In Book
100002	MARLBORO BLACK BOX K/S SOFTPACK	0	8/12/13	2 CTN	3 Authorized/Print In Book
100003	MARLBORO BLACK BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100004	MARLBORO BLACK MEN BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100028	MARLBORO BLACK MEN SPEC BLEND B 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100026	MARLBORO BLACK MEN SPEC BLEND BX KS	0	8/12/13	2 CTN	3 Authorized/Print In Book
100024	MARLBORO BLACK SPEC BLEND BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100027	MARLBORO BLACK SPEC BLEND BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100001	MARLBORO BLEND BOX K/S SOFTPACK	0	8/12/13	2 CTN	3 Authorized/Print In Book
100005	MARLBORO BLEND BOX KING #27	0	8/12/13	2 CTN	3 Authorized/Print In Book
100006	MARLBORO BLEND BOX KING #54	0	8/12/13	2 CTN	3 Authorized/Print In Book
100007	MARLBORO BLEND BOX 100 #54	0	8/12/13	2 CTN	3 Authorized/Print In Book
100008	MARLBORO BLUE MEN BOX K/S	0	4/09/12	2 CTN	3 Authorized/Print In Book
100010	MARLBORO BLUE MEN BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100013	MARLBORO BLUE MEN 72	0	8/12/13	2 CTN	3 Authorized/Print In Book
100015	MARLBORO BLUE MEN 72	0	8/12/13	2 CTN	3 Authorized/Print In Book
100009	MARLBORO GOLD BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100011	MARLBORO GOLD KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100012	MARLBORO GOLD MEN BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100016	MARLBORO GOLD 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100014	MARLBORO GREEN MEN 72	0	8/12/13	2 CTN	3 Authorized/Print In Book
100017	MARLBORO RED LABEL BOX KING	0	5/28/12	2 CTN	3 Authorized/Print In Book
100018	MARLBORO RED LABEL BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100019	MARLBORO SILVER BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100020	MARLBORO SILVER BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100021	MARLBORO SILVER BOX 72	0	8/12/13	2 CTN	3 Authorized/Print In Book
100022	MARLBORO SILVER MENTHOL BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100023	MARLBORO SILVER MENTHOL BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100029	MARLBORO SPEC BLEND RED BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100030	MARLBORO SPEC BLEND RED BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100031	MARLBORO VIRGINIA BLEND BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100032	MARLBORO VIRGINIA BLEND BOX 100	0	12/24/12	2 CTN	3 Authorized/Print In Book
100051	VIRGINIA SLIM GOLD BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100052	VIRGINIA SLIM GOLD MEN BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100053	VIRGINIA SLIM GOLD MEN 120	0	8/12/13	2 CTN	3 Authorized/Print In Book
100054	VIRGINIA SLIM GOLD 120	0	8/12/13	2 CTN	3 Authorized/Print In Book
100057	VIRGINIA SLIM SILVER BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100055	VIRGINIA SLIMS MENTHOL BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100056	VIRGINIA SLIMS MENTHOL 100	0	1/21/13	2 CTN	3 Authorized/Print In Book
100033	BASIC BLUE BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100034	BASIC BLUE BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100035	BASIC BLUE 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100036	BASIC GOLD BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100037	BASIC GOLD BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100038	BASIC GOLD MENTHOL BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100039	BASIC GOLD MENTHOL BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100040	MERIT BLUE BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100041	MERIT BLUE BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100042	MERIT BLUE 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100043	MERIT BRONZE BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100044	MERIT BRONZE BOX 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100045	MERIT GOLD BOX KING	0	8/12/13	2 CTN	3 Authorized/Print In Book
100046	MERIT GOLD MENTHOL 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100047	MERIT GOLD 100	0	8/12/13	2 CTN	3 Authorized/Print In Book
100048	MERIT SILVER MENTHOL K/S	0	8/12/13	2 CTN	3 Authorized/Print In Book
100058	MARLBORO BLACK BOX 100 B2G$2	0	4/25/12	2 CTN	3 Authorized/Print In Book

Category 2 TOBACCO

Item Number	Item Description	Build Up Quantity	Last Purchase	Normal Buy Unit	Authorization Flag
770130	BLACKJACK FULL FLAVOR 16OZ	0	8/12/13	2 EA	3 Authorized/Print In Book
930030	CAPTAIN BLACK GOLD POUCH	0	8/12/13	2 PK	3 Authorized/Print In Book

Printing A Velocity Report

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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


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

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


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

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

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


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

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


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

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

4. To print velocity reports (or summary reports) for corporate customers, enter
   customer corporate numbers for the **Beg Corp. #** and **End Corp. #** (6,n) fields.
   If necessary, press <F4> to select customer corporate numbers from the Select
   Corporate Master screen. Note: Numbers consisting of less than six digits must be
   entered with preceding zeros. For example, *010100* must be entered to designate
   the number 10100.

5. To print velocity reports (or summary reports) for a range of customers, enter
   customer numbers for the **Beg Cust. #** and **End Cust. #** (6,n) fields.
   If necessary, press <F4> to select customer numbers from the Select Customer
   Master screen. Note: Numbers consisting of less than six digits must be entered
   with preceding zeros. For example, *010100* must be entered to designate the
   number 10100.

6. To print velocity reports for the customer accounts of a particular sales
   representative, enter data for the following:
   • **Salesman** (6,a) field - the employee code of the sales representative assigned
     to the customer accounts. A value should be entered for the **Salesman** field to
     print version 3 of the report (see **Version** below).
     If necessary, press <F4> to select a code from the Select Employee Master
     screen.
   • **End Corp. #** or **End Cust. #** field - enter *999999* for one of these fields.

7. To print velocity reports (or item summary reports) for a group of customers, enter
   a customer collection number for the **Cust. Collection** (6,n) field. If necessary,
   press <F4> to select or create a collection. Refer to Working With Customer
   Collections above, beginning with step 3, for additional instructions.

8. To print velocity reports (or item summary reports) for a group of customers
   based on account type, enter data for the following:
   • **Account Type** (4,a) field - the acount type code of the desired group of

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

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

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


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

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

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

9. Enter a warehouse code for the **Warehouse** (6,a) field to restrict the items included in the velocity reports to a designated warehouse. If necessary, press <F4> to select a warehouse code from the Select Warehouse Master screen.

10. Press <F7> (Toggle Class) as necessary before entering data for one of the following to restrict the items as described for each criteria, and continue with step 12.
    - **Beg Sales Class** and **End Sales Class** (5,n) fields - a sales class number. If necessary, press <F4> to select a number from the Select Sales Class Master screen.
    - **Beg Prod. Class** and **End Prod. Class** (5,n) fields - a product class number. If necessary, press <F4> to select a number from the Select Product Class screen.
    - **Beg Category** and **End Category** (2,n) fields - an item category number. If necessary, press <F4> to select a number from the Select Item Category Master screen.

11. Enter data for one of the following to restrict the items included in the reports:
    - **Item Collection** (5,n) field - an item collection number. If necessary, press <F4> to select a number from the Work With Item Collections screen.
    - **Vendor Number** (6,a) field - a vendor code. If necessary, press <F4> to select a vendor code from the Select Vendor Master screen.

12. Enter a range of dates for the **Start Date** and **End Date** (6,n) fields to limit the item sales to the designated range.

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


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

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

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

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

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

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

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

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

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

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

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


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

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

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

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

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

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

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

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

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


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

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

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

23. Enter one of the following values for the **U/M For Price** (3,a) field to designate for which selling level the items' prices are printed in the report:
    - *SSU* - the standard selling unit of measure
    - *EA.* - the first selling level (**U/M1** field of item records).

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

25. If outbound email functionality is enabled on the distributor's system, enter *Y* (yes) for one of the following fields, if desired:
    - **Output To PDF?** (1,a) - to automatically email the velocity and item summary reports as PDF file attachments to customers.
    - **Output To CSV?** (1,a) - to automatically email the velocity reports as CSV file attachments to customers.

    No reports are printed on the distributor's system when they are emailed, but the files that are sent as attachments will appear as documents in the CV1COM folder of the distributor's system.

26. Press <F6> (Print) to print or email the reports. Below are examples of the prompt screens that appear when the email is used.

27. Press <F3> to exit. The Special Customer Reports screen appears.

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

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

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



                    VA900200 - Velocity Report


                    VD900200 - Item/Cust Summary



                    Send As Email Attachment? Y (Y/N)




F3=Exit
```

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

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

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



                    VA900300 - Velocity Report




                    Send As Email Attachment? Y (Y/N)




F3=Exit
```

Saving and Loading Velocity Report Selection Criteria

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

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


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

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

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

1. After entering all the desired values of the necessary fields on the Velocity By Date Range field, press <F10> (Save Sel.). The Add/Update Velocity Selection Description screen appears.

2. Enter a description of the criteria for the **Selection Desc:** field as illustrated below.

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

Type choices, press Enter.



Selection Desc: Kings Qtly with Item Summary        _____












F3=Exit
```

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

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

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

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

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

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

```
HIS8DFR    DISPLAY CDR Customer Conference             4/22/13 11:09:05
                        Velocity Rpt Selection
VRS
Key
    8

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

?  Sel #  Description                    From  To    From      To
_      8  Kings Qtly with Item Summary                1/01/13   3/31/13
_      9  MS Stop & Go Qtly              01    13










F3=Exit
```

The **VRS Key** field can be used to locate the desired selection criteria.

As illustrated above, selection criteria using a date range is listed with **From** and **To** dates including months, days and years, and those using a range of weeks include only the weeks.

CDR Customer Conference   V E L O C I T Y R E P O R T   JEANNINE   BSKMPFR   4/05/13 12:26:49 Page   1

From: 01/01/13 To: 03/31/13   For -- KINGS GROCERY   BILOXI   MS   Cust #: 320033

Warehouse: 1   MAIN WAREHOUSE   319 CAILAVEL ST   39350 -

Item Number	Description	-Packed-	Unit	Unit Price	Rank	Item %	Cumm %	Whole Units	Each Units	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
	Class 100 PREMIUM CIGARETTES													
111700	KOOL MENT 100 MILD	20PK	CTN	31.37	1	32.55	32.55	1503		47149.11	5.95	89428.50	42279.39	47.28
120200	WINSTON 100 LIGHT	20PK	CTN	31.37	2	28.23	60.78	1201		37675.37	6.19	74341.90	36666.53	49.32
100500	CAMEL FILTER 85 BOX	20PK	CTN	31.37	3	18.52	79.30	855		26821.35	5.95	50872.50	24051.15	47.28
108300	B&H MENT 100 LT.	20PK	CTN	33.90	4	13.00	92.30	603		20441.70	6.19	37325.70	16884.00	45.23
118800	VANTAGE MENT 100	20PK	CTN	33.43	5	7.49	99.79	253		8457.79	7.19	18190.70	9732.91	53.50
115401	PALL MALL 100 BOX	20PK	CTN	27.76	6	1.88	101.67	151		4191.76	4.39	6628.90	2437.14	36.77
100058	MARLBORO BLACK BOX 100 B2G$2	20PK	CTN	36.60	7	.03	101.70	3		109.80	9.98	149.70	39.90	26.65
100056	VIRGINIA SLIMS MENTHOL 100	20PK	CTN	43.38	8	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100055	VIRGINIA SLIMS MENTHOL BOX 100	20PK	CTN	43.38	9	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100057	VIRGINIA SLIM SILVER BOX 100	20PK	CTN	43.38	10	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100054	VIRGINIA SLIM GOLD 120	20PK	CTN	43.38	11	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100053	VIRGINIA SLIM GOLD MEN 120	20PK	CTN	43.38	12	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100052	VIRGINIA SLIM GOLD MEN BOX 100	20PK	CTN	43.38	13	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100051	VIRGINIA SLIM GOLD BOX 100	20PK	CTN	43.38	14	.00	101.70	1		43.38	4.21	42.10	1.28-	3.04-
100017	MARLBORO RED LABEL BOX KING	20PK	CTN	41.60	15	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100014	MARLBORO GREEN MEN 72	20PK	CTN	41.60	16	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100012	MARLBORO GOLD MEN BOX 100	20PK	CTN	41.60	17	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100011	MARLBORO GOLD KING	20PK	CTN	41.60	18	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100009	MARLBORO GOLD BOX KING	20PK	CTN	41.60	19	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100015	MARLBORO BLUE MEN 72	20PK	CTN	41.60	20	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100013	MARLBORO BLUE MEN 72	20PK	CTN	41.60	21	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100010	MARLBORO BLUE MEN BOX 100	20PK	CTN	41.60	22	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100007	MARLBORO BLEND BOX 100 #54	20PK	CTN	41.60	23	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100006	MARLBORO BLEND BOX KING #54	20PK	CTN	41.60	24	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100005	MARLBORO BLEND BOX KING #27	20PK	CTN	41.60	25	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100027	MARLBORO BLACK SPEC BLEND BOX 100	20PK	CTN	41.60	26	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100024	MARLBORO BLACK SPEC BLEND BOX KING	20PK	CTN	41.60	27	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100026	MARLBORO BLACK MEN SPEC BLEND BX KS	20PK	CTN	41.60	28	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100028	MARLBORO BLACK MEN SPEC BLEND B 100	20PK	CTN	41.60	29	.00	101.70	1		41.60	4.03	40.30	1.30-	3.23-
100001	MARLBORO BLACK BOX K/S SOFTPACK	20PK	CTN	31.60	30	.00	101.70	1		31.60	3.02	30.20	1.40-	4.64-
100031	MARLBORO VIRGINIA BLEND BOX KING	20PK	CTN	41.60	31	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100029	MARLBORO SPEC BLEND RED BOX KING	20PK	CTN	41.60	32	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100022	MARLBORO SILVER MENTHOL BOX KING	20PK	CTN	41.60	33	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100020	MARLBORO SILVER BOX 100	20PK	CTN	41.60	34	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100018	MARLBORO RED LABEL BOX 100	20PK	CTN	41.60	35	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100008	MARLBORO BLUE MEN BOX K/S	20PK	CTN	36.60	36	.00	101.70	2		73.20	3.53	70.60	2.60-	3.68-
100004	MARLBORO BLACK MEN BOX 100	20PK	CTN	41.60	37	.00	101.70	2		83.20	4.03	80.60	2.60-	3.23-
100032	MARLBORO VIRGINIA BLEND BOX 100	20PK	CTN	41.60	38	.00	101.70	3		124.80	4.03	120.90	3.90-	3.23-

Velocity Report - Version 1 (continued)

From: 01/01/13 To: 03/31/13   For -- KINGS GROCERY   BILOXI   MS   Cust #: 320033
Warehouse: 1   MAIN WAREHOUSE   319 CAILIAVEL ST   39350 -

Item Number	Description	Packed-	Unit	Unit Price	Rank	Item %	Cumm %	Whole Units	Each Units	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
100030	MARLBORO SPEC BLEND RED BOX 100	20PK	CTN	41.60	39	.00	101.70	3		124.80	4.03	120.90	3.90-	3.23-
100023	MARLBORO SILVER MENTHOL BOX 100	20PK	CTN	41.60	40	.00	101.70	3		124.80	4.03	120.90	3.90-	3.23-
100021	MARLBORO SILVER BOX 72	20PK	CTN	41.60	41	.00	101.70	3		124.80	4.03	120.90	3.90-	3.23-
100019	MARLBORO SILVER BOX KING	20PK	CTN	41.60	42	.00	101.70	3		124.80	4.03	120.90	3.90-	3.23-
100003	MARLBORO BLACK BOX 100	20PK	CTN	36.60	43	.00	101.70	3		109.80	3.53	105.90	3.90-	3.68-
100002	MARLBORO BLACK BOX K/S SOFTPACK	20PK	CTN	36.60	44	.00	101.70	3		109.80	3.53	105.90	3.90-	3.68-
113200	MARLBORO GOLD BOX 100	20PK	CTN	41.60	45	.20	101.50	271		11179.10	4.03	10921.30	257.80-	2.36-
100016	MARLBORO GOLD 100	20PK	CTN	41.60	46	.60	100.90	601		25001.60	4.03	24220.30	781.30-	3.23-
119526	VIRGINIA SLIM SILVER MEN BOX 100	20PK	CTN	43.38	47	.83	100.07	841		36482.58	4.21	35406.10	1076.48-	3.04-
	*** Class Totals ***							6340		219885.42		349785.50	129900.08	
Class 101 DISCOUNT CIGARETTES														
131200	BEST VALUE MENT 100 LT	20PK	CTN	18.50	1	29.30	29.30	2523		46675.50	3.69	93098.70	46423.20	49.86
125800	DORAL FF MENT 100	20PK	CTN	27.76	2	20.39	49.69	2001		55547.76	4.39	87843.90	32296.14	36.77
131761	BASIC FF 100 BOX	20PK	CTN	28.79	3	20.03	69.72	1503		43271.37	4.99	74999.70	31728.33	42.30
130585	GPC 100 ULTRA BOX	20PK	CTN	22.49	4	12.32	82.04	1455		32722.95	3.59	52234.50	19511.55	37.35
101300	CARLTON MENTHOL	20PK	CTN	34.90	5	8.18	90.22	864		30153.60	4.99	43113.60	12960.00	30.06
102811	LIGGETT SELECT FF MENTH BOX 100	20PK	CTN	17.69	6	7.02	97.24	783		13851.27	3.19	24977.70	11126.43	44.55
102815	LIGGETT SELECT ULTRA 100 BX	20PK	CTN	17.69	7	2.98	100.22	332		5873.08	3.19	10590.80	4717.72	44.55
100039	BASIC GOLD MENTHOL BOX 100	20PK	CTN	39.00	8	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100038	BASIC GOLD MENTHOL BOX KING	20PK	CTN	39.00	9	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100037	BASIC GOLD BOX 100	20PK	CTN	39.00	10	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100036	BASIC GOLD BOX KING	20PK	CTN	39.00	11	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100035	BASIC BLUE 100	20PK	CTN	39.00	12	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100034	BASIC BLUE BOX 100	20PK	CTN	39.00	13	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100033	BASIC BLUE BOX KING	20PK	CTN	39.00	14	.00	100.22	3		117.00	3.77	113.10	3.90-	3.45-
100048	MERIT SILVER MENTHOL K/s	20PK	CTN	50.54	15	.02	100.20	2		101.08	3.77	75.40	25.68-	34.06-
100046	MERIT GOLD MENTHOL 100	20PK	CTN	50.54	16	.02	100.18	2		101.08	3.77	75.40	25.68-	34.06-
100044	MERIT BRONZE BOX 100	20PK	CTN	50.54	17	.02	100.16	2		101.08	3.77	75.40	25.68-	34.06-
100042	MERIT BLUE 100	20PK	CTN	50.54	18	.02	100.14	2		101.08	3.77	75.40	25.68-	34.06-
100040	MERIT BLUE BOX KING	20PK	CTN	50.54	19	.02	100.12	2		101.08	3.77	75.40	25.68-	34.06-
100049	MERIT SILVER MENTHOL 100	20PK	CTN	50.54	20	.02	100.10	3		151.62	3.77	113.10	38.52-	34.06-
100047	MERIT GOLD 100	20PK	CTN	50.54	21	.02	100.08	3		151.62	3.77	113.10	38.52-	34.06-
100045	MERIT GOLD BOX KING	20PK	CTN	50.54	22	.02	100.06	3		151.62	3.77	113.10	38.52-	34.06-
100043	MERIT BRONZE BOX KING	20PK	CTN	50.54	23	.02	100.04	3		151.62	3.77	113.10	38.52-	34.06-
100041	MERIT BLUE BOX 100	20PK	CTN	50.54	24	.02	100.02	3		151.62	3.77	113.10	38.52-	34.06-
	*** Class Totals ***							9507		230178.03		388593.10	158415.07	
	*** Customer Totals ***							15847		450063.45		738378.60	288315.15	

Velocity Report - Version 2

From: 01/01/13 To: 03/31/13   For -- KINGS GROCERY   BILOXI   MS   Cust #: 320033
Warehouse: 1   MAIN WAREHOUSE

Item Number	Description	-Packed-	Unit	Unit Price	Rank	Whole Units	Each Units	W Units Last Yr	E Units Last Yr	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
Vendor LIG001 LIGGETT & MEYERS TOBACCO														
Class 101 DISCOUNT CIGARETTES														
102811	LIGGETT SELECT FF MENTH BOX 100	20PK	CTN	17.69	1	783				13851.27	3.19	24977.70	11126.43	44.55
102815	LIGGETT SELECT ULTRA 100 BX	20PK	CTN	17.69	2	332				5873.08	3.19	10590.80	4717.72	44.55
	*** Class Totals ***					1115				19724.35		35568.50	15844.15	
	*** Vendor Totals ***					1115				19724.35		35568.50	15844.15	
Vendor PHI001 PHILLIP MORRIS INC.														
Class 100 PREMIUM CIGARETTES														
108300	B&H MENT 100 LT.	20PK	CTN	33.90	1	603				20441.70	6.19	37325.70	16884.00	45.23
100058	MARLBORO BLACK BOX 100 B2G$2	20PK	CTN	36.60	2	3				109.80	9.98	149.70	39.90	26.65
100056	VIRGINIA SLIMS MENTHOL 100	20PK	CTN	43.38	3	1				43.38	4.21	42.10	1.28-	3.04-
100055	VIRGINIA SLIMS MENTHOL BOX 100	20PK	CTN	43.38	4	1				43.38	4.21	42.10	1.28-	3.04-
100057	VIRGINIA SLIM SILVER BOX 100	20PK	CTN	43.38	5	1				43.38	4.21	42.10	1.28-	3.04-
100054	VIRGINIA SLIM GOLD 120	20PK	CTN	43.38	6	1				43.38	4.21	42.10	1.28-	3.04-
100053	VIRGINIA SLIM GOLD MEN 120	20PK	CTN	43.38	7	1				43.38	4.21	42.10	1.28-	3.04-
100052	VIRGINIA SLIM GOLD MEN BOX 100	20PK	CTN	43.38	8	1				43.38	4.21	42.10	1.28-	3.04-
100051	VIRGINIA SLIM GOLD BOX 100	20PK	CTN	43.38	9	1				43.38	4.21	42.10	1.28-	3.04-
100017	MARLBORO RED LABEL BOX KING	20PK	CTN	41.60	10	1				41.60	4.03	40.30	1.30-	3.23-
100014	MARLBORO GREEN MEN 72	20PK	CTN	41.60	11	1				41.60	4.03	40.30	1.30-	3.23-
100012	MARLBORO GOLD MEN BOX 100	20PK	CTN	41.60	12	1				41.60	4.03	40.30	1.30-	3.23-
100011	MARLBORO GOLD KING	20PK	CTN	41.60	13	1				41.60	4.03	40.30	1.30-	3.23-
100009	MARLBORO GOLD BOX KING	20PK	CTN	41.60	14	1				41.60	4.03	40.30	1.30-	3.23-
100015	MARLBORO BLUE MEN 72	20PK	CTN	41.60	15	1				41.60	4.03	40.30	1.30-	3.23-
100013	MARLBORO BLUE MEN 72	20PK	CTN	41.60	16	1				41.60	4.03	40.30	1.30-	3.23-
100010	MARLBORO BLUE MEN BOX 100	20PK	CTN	41.60	17	1				41.60	4.03	40.30	1.30-	3.23-
100007	MARLBORO BLEND BOX 100 #54	20PK	CTN	41.60	18	1				41.60	4.03	40.30	1.30-	3.23-
100006	MARLBORO BLEND BOX KING #54	20PK	CTN	41.60	19	1				41.60	4.03	40.30	1.30-	3.23-
100005	MARLBORO BLEND BOX KING #27	20PK	CTN	41.60	20	1				41.60	4.03	40.30	1.30-	3.23-
100027	MARLBORO BLACK SPEC BLEND BOX 100	20PK	CTN	41.60	21	1				41.60	4.03	40.30	1.30-	3.23-
100024	MARLBORO BLACK SPEC BLEND BOX KING	20PK	CTN	41.60	22	1				41.60	4.03	40.30	1.30-	3.23-
100026	MARLBORO BLACK MEN SPEC BLEND BX KS	20PK	CTN	41.60	23	1				41.60	4.03	40.30	1.30-	3.23-
100028	MARLBORO BLACK MEN SPEC BLEND B 100	20PK	CTN	41.60	24	1				41.60	4.03	40.30	1.30-	3.23-
100001	MARLBORO BLEND BOX K/S SOFTPACK	20PK	CTN	31.60	25	1				31.60	3.02	30.20	1.40-	4.64-
100031	MARLBORO VIRGINIA BLEND BOX KING	20PK	CTN	41.60	26	2				83.20	4.03	80.60	2.60-	3.23-
100029	MARLBORO SPEC BLEND RED BOX KING	20PK	CTN	41.60	27	2				83.20	4.03	80.60	2.60-	3.23-
100022	MARLBORO SILVER MENTHOL BOX KING	20PK	CTN	41.60	28	2				83.20	4.03	80.60	2.60-	3.23-
100020	MARLBORO SILVER BOX 100	20PK	CTN	41.60	29	2				83.20	4.03	80.60	2.60-	3.23-

Velocity Report - Version 2 (continued)

From: 01/01/13 To: 03/31/13   For -- KINGS GROCERY   BILOXI   MS   Cust #: 320033
Warehouse: 1   MAIN WAREHOUSE

Item Number	Description	-Packed-	Unit	Unit Price	Rank	Whole Units	Each Units	W Units Last Yr	E Units Last Yr	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
100018	MARLBORO RED LABEL BOX 100	20PK	CTN	41.60	30	2				83.20	4.03	80.60	2.60-	3.23-
100008	MARLBORO BLUE MEN BOX K/S	20PK	CTN	41.60	31	2				83.20	4.03	80.60	2.60-	3.23-
100004	MARLBORO BLACK MEN BOX 100	20PK	CTN	36.60	32	2				73.20	3.53	70.60	2.60-	3.68-
100032	MARLBORO VIRGINIA BLEND BOX 100	20PK	CTN	41.60	33	3				124.80	4.03	120.90	3.90-	3.23-
100030	MARLBORO SPEC BLEND RED BOX 100	20PK	CTN	41.60	34	3				124.80	4.03	120.90	3.90-	3.23-
100023	MARLBORO SILVER MENTHOL BOX 100	20PK	CTN	41.60	35	3				124.80	4.03	120.90	3.90-	3.23-
100021	MARLBORO SILVER BOX 72	20PK	CTN	41.60	36	3				124.80	4.03	120.90	3.90-	3.23-
100019	MARLBORO SILVER BOX KING	20PK	CTN	41.60	37	3				124.80	4.03	120.90	3.90-	3.23-
100003	MARLBORO BLACK BOX 100	20PK	CTN	36.60	38	3				109.80	3.53	105.90	3.90-	3.68-
100002	MARLBORO BLACK BOX K/S SOFTPACK	20PK	CTN	36.60	39	3				109.80	3.53	105.90	3.90-	3.68-
113200	MARLBORO GOLD BOX 100	20PK	CTN	41.60	40	271				11179.10	4.03	10921.30	257.80-	2.36-
100016	MARLBORO GOLD 100	20PK	CTN	41.60	41	601				25001.60	4.03	24220.30	781.30-	3.23-
119526	VIRGINIA SLIM SILVER MEN BOX 100	20PK	CTN	43.38	42	841				36482.58	4.21	35406.10	1076.48-	3.04-
	*** Class Totals ***					2377				95590.04		110323.00	14732.96	
Class	101 DISCOUNT CIGARETTES													
131761	BASIC FF 100 BOX	20PK	CTN	28.79	1	1503				43271.37	4.99	74999.70	31728.33	42.30
100039	BASIC GOLD MENTHOL BOX 100	20PK	CTN	39.00	2	3				117.00	3.77	113.10	3.90-	3.45-
100038	BASIC GOLD MENTHOL BOX KING	20PK	CTN	39.00	3	3				117.00	3.77	113.10	3.90-	3.45-
100037	BASIC GOLD BOX 100	20PK	CTN	39.00	4	3				117.00	3.77	113.10	3.90-	3.45-
100036	BASIC GOLD BOX KING	20PK	CTN	39.00	5	3				117.00	3.77	113.10	3.90-	3.45-
100035	BASIC BLUE 100	20PK	CTN	39.00	6	3				117.00	3.77	113.10	3.90-	3.45-
100034	BASIC BLUE BOX 100	20PK	CTN	39.00	7	3				117.00	3.77	113.10	3.90-	3.45-
100033	BASIC BLUE BOX KING	20PK	CTN	39.00	8	3				117.00	3.77	113.10	3.90-	3.45-
100048	MERIT SILVER MENTHOL K/S	20PK	CTN	50.54	9	2				101.08	3.77	75.40	25.68-	34.06-
100046	MERIT GOLD MENTHOL 100	20PK	CTN	50.54	10	2				101.08	3.77	75.40	25.68-	34.06-
100044	MERIT BRONZE BOX 100	20PK	CTN	50.54	11	2				101.08	3.77	75.40	25.68-	34.06-
100042	MERIT BLUE 100	20PK	CTN	50.54	12	2				101.08	3.77	75.40	25.68-	34.06-
100040	MERIT BLUE BOX KING	20PK	CTN	50.54	13	2				101.08	3.77	75.40	25.68-	34.06-
100049	MERIT SILVER MENTHOL 100	20PK	CTN	50.54	14	3				151.62	3.77	113.10	38.52-	34.06-
100047	MERIT GOLD 100	20PK	CTN	50.54	15	3				151.62	3.77	113.10	38.52-	34.06-
100045	MERIT GOLD BOX KING	20PK	CTN	50.54	16	3				151.62	3.77	113.10	38.52-	34.06-
100043	MERIT BRONZE BOX KING	20PK	CTN	50.54	17	3				151.62	3.77	113.10	38.52-	34.06-
100041	MERIT BLUE BOX 100	20PK	CTN	50.54	18	3				151.62	3.77	113.10	38.52-	34.06-
	*** Class Totals ***					1549				45353.87		76733.90	31380.03	
	*** Vendor Totals ***					3926				140943.91		187056.90	46112.99	

Velocity Report - Version 2 (continued)

From: 01/01/13 To: 03/31/13   For -- KINGS GROCERY   BILOXI   MS   Cust #: 320033
Warehouse: 1   MAIN WAREHOUSE

Item Number	Description	-Packed- Unit	Unit Price	Rank	Whole Units	Each Units	W Units Last Yr	E Units Last Yr	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
	Vendor RJR100 R.J. REYNOLDS TOBACCO INC.												
	Class 100 PREMIUM CIGARETTES												
111700	KOOL MENT 100 MILD	20PK CTN	31.37	1	1503				47149.11	5.95	89428.50	42279.39	47.28
120200	WINSTON 100 LIGHT	20PK CTN	31.37	2	1201				37675.37	6.19	74341.90	36666.53	49.32
100500	CAMEL FILTER 85 BOX	20PK CTN	31.37	3	855				26821.35	5.95	50872.50	24051.15	47.28
118800	VANTAGE MENT 100	20PK CTN	33.43	4	253				8457.79	7.19	18190.70	9732.91	53.50
115401	PALL MALL 100 BOX	20PK CTN	27.76	5	151				4191.76	4.39	6628.90	2437.14	36.77
	*** Class Totals ***				3963				124295.38		239462.50	115167.12	
	Class 101 DISCOUNT CIGARETTES												
131200	BEST VALUE MENT 100 LT	20PK CTN	18.50	1	2523				46675.50	3.69	93098.70	46423.20	49.86
125800	DORAL FF MENT 100	20PK CTN	27.76	2	2001				55547.76	4.39	87843.90	32296.14	36.77
130585	GPC 100 ULTRA BOX	20PK CTN	22.49	3	1455				32722.95	3.59	52234.50	19511.55	37.35
101300	CARLTON MENTHOL	20PK CTN	34.90	4	864				30153.60	4.99	43313.60	12960.00	30.06
	*** Class Totals ***				6843				165099.81		276290.70	111190.89	
	*** Vendor Totals ***				10806				289395.19		515753.20	226358.01	
	*** Customer Totals ***				15847				450063.45		738378.60	288315.15	

Velocity Report - Version 2 (continued)

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CDR Customer Conference          V E L O C I T Y   R E P O R T          JEANNINE   GSKKPFR   4/05/13 14:10:12 Page     4

                                  (Customer Vendor/Class Summary)

From: 01/01/13 To: 03/31/13      For -- KINGS GROCERY                             BILOXI                      MS      Cust: 320033

        Class   Description                         Purchases   % Of Total      Retail

Vendor LIG001  LIGGETT & MEYERS TOBACCO
Class   101 DISCOUNT CIGARETTES                      19724.35         4.38     35568.50

                *** Vendor Totals ***               19724.35         4.38     35568.50

Vendor PHI001  PHILLIP MORRIS INC.
Class   100 PREMIUM CIGARETTES                       95590.04        21.24    110323.00
Class   101 DISCOUNT CIGARETTES                      45353.87        10.08     76733.90

                *** Vendor Totals ***              140943.91        31.32    187056.90

Vendor RJR100  R.J. REYNOLDS TOBACCO INC.
Class   100 PREMIUM CIGARETTES                      124295.38        27.62    239462.50
Class   101 DISCOUNT CIGARETTES                     165099.81        36.68    276290.70

                *** Vendor Totals ***              289395.19        64.30    515753.20

                *** Final totals ***               450,063.45               738,378.60

** END OF REPORT **
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CDR Customer Conference          V E L O C I T Y   R E P O R T     JEANNINE   GSWBPFR    4/05/13 16:27:51 Page   1

Salesman: 20    JOE BADEAUX

From: 01/01/13 To: 03/31/13        For -- B & D FOOD STORE                            Cust #: 771230
Warehouse: 1    MAIN WAREHOUSE
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Description	-Packed-	Unit	Unit Price	Rank	Item %	Cumm %	Whole Units	Each Units	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
Class 100 PREMIUM CIGARETTES													
100017 MARLBORO RED LABEL BOX KING	20PK	CTN	53.90	1	.03	.03	2		107.80	12.55	251.00	143.20	57.05
100014 MARLBORO GREEN MEN 72	20PK	CTN	53.90	2	.03	.06	2		107.80	12.55	251.00	143.20	57.05
100012 MARLBORO GOLD MEN BOX 100	20PK	CTN	53.90	3	.03	.09	2		107.80	12.55	251.00	143.20	57.05
100011 MARLBORO GOLD KING	20PK	CTN	53.90	4	.03	.12	2		107.80	12.55	251.00	143.20	57.05
100009 MARLBORO GOLD BOX KING	20PK	CTN	53.90	5	.03	.15	2		107.80	12.55	251.00	143.20	57.05
100015 MARLBORO BLUE MEN 72	20PK	CTN	53.90	6	.03	.18	2		107.80	12.55	251.00	143.20	57.05
100013 MARLBORO BLUE MEN 72	20PK	CTN	53.90	7	.03	.21	2		107.80	12.55	251.00	143.20	57.05
100010 MARLBORO BLUE MEN BOX 100	20PK	CTN	48.90	8	.03	.24	2		107.80	12.55	251.00	143.20	57.05
100058 MARLBORO BLACK BOX 100 B2G$2	20PK	CTN	48.90	9	.04	.28	3		146.70	22.75	341.25	194.55	57.01
100003 MARLBORO BLACK BOX 100	20PK	CTN	48.90	10	.04	.32	3		146.70	11.39	341.70	195.00	57.07
100002 MARLBORO BLACK BOX K/S SOFTPACK	20PK	CTN	48.90	11	.04	.36	3		146.70	11.39	341.70	195.00	57.07
100006 MARLBORO BLEND BOX KING #54	20PK	CTN	53.90	12	.04	.40	3		161.70	12.55	376.50	214.80	57.05
100005 MARLBORO BLEND BOX KING #27	20PK	CTN	53.90	13	.04	.44	3		161.70	12.55	376.50	214.80	57.05
100024 MARLBORO BLACK SPEC BLEND BOX KING	20PK	CTN	53.90	14	.04	.48	3		161.70	12.55	376.50	214.80	57.05
100026 MARLBORO BLACK MEN SPEC BLEND BX KS	20PK	CTN	53.90	15	.04	.52	3		161.70	12.55	376.50	214.80	57.05
100028 MARLBORO BLACK MEN SPEC BLEND B 100	20PK	CTN	53.90	16	.04	.56	3		161.70	12.55	376.50	214.80	57.05
100057 VIRGINIA SLIM SILVER BOX 100	20PK	CTN	55.68	17	.04	.60	3		167.04	12.95	388.50	221.46	57.00
100054 VIRGINIA SLIM GOLD 120	20PK	CTN	55.68	18	.04	.64	3		167.04	12.95	388.50	221.46	57.00
100053 VIRGINIA SLIM GOLD MEN 120	20PK	CTN	55.68	19	.04	.68	3		167.04	12.95	388.50	221.46	57.00
100052 VIRGINIA SLIM GOLD MEN BOX 100	20PK	CTN	55.68	20	.04	.72	3		167.04	12.95	388.50	221.46	57.00
100051 VIRGINIA SLIM GOLD BOX 100	20PK	CTN	55.68	21	.04	.76	3		167.04	12.95	388.50	221.46	57.00
100001 MARLBORO BLEND BOX K/S SOFTPACK	20PK	CTN	43.90	22	.06	.82	5		219.50	10.25	512.50	293.00	57.17
100004 MARLBORO BLACK MEN BOX 100	20PK	CTN	48.90	23	.06	.88	5		244.50	11.39	569.50	325.00	57.07
100056 VIRGINIA SLIMS MENTHOL 100	20PK	CTN	55.68	24	.07	.95	5		278.40	12.95	647.50	369.10	57.00
100055 VIRGINIA SLIMS MENTHOL BOX 100	20PK	CTN	55.68	25	.07	1.02	5		278.40	12.95	647.50	369.10	57.00
100020 MARLBORO SILVER BOX 100	20PK	CTN	53.90	26	.08	1.10	6		323.40	12.55	753.00	429.60	57.05
100018 MARLBORO RED LABEL BOX 100	20PK	CTN	53.90	27	.08	1.18	6		323.40	12.55	753.00	429.60	57.05
100007 MARLBORO BLEND BOX 100 #54	20PK	CTN	53.90	28	.08	1.26	6		323.40	12.55	753.00	429.60	57.05
100008 MARLBORO BLUE MEN BOX K/S	20PK	CTN	53.90	29	.08	1.34	6		323.40	12.55	753.00	429.60	57.05
100027 MARLBORO BLACK SPEC BLEND BOX 100	20PK	CTN	53.90	30	.10	1.44	7		377.30	12.55	878.50	501.20	57.05
100032 MARLBORO VIRGINIA BLEND BOX 100	20PK	CTN	53.90	31	.11	1.55	8		431.20	12.55	1004.00	572.80	57.05
100031 MARLBORO VIRGINIA BLEND BOX KING	20PK	CTN	53.90	32	.11	1.66	8		431.20	12.55	1004.00	572.80	57.05
100029 MARLBORO SPEC BLEND RED BOX KING	20PK	CTN	53.90	33	.12	1.78	9		485.10	12.55	1129.50	644.40	57.05
100022 MARLBORO SILVER MENTHOL BOX KING	20PK	CTN	53.90	34	.12	1.90	9		485.10	12.55	1129.50	644.40	57.05
100021 MARLBORO SILVER BOX 72	20PK	CTN	53.90	35	.12	2.02	9		485.10	12.55	1129.50	644.40	57.05
100019 MARLBORO SILVER BOX KING	20PK	CTN	53.90	36	.12	2.14	9		485.10	12.55	1129.50	644.40	57.05

Velocity Report - Version 3 (continued)

From: 01/01/13 To: 03/31/13   For -- B & D FOOD STORE   Cust #: 771230
Warehouse: 1   MAIN WAREHOUSE

Description	-Packed-	Unit	Unit Price	Rank	Item %	Cumm %	Whole Units	Each Units	Net Dollars	Retail Price	Retail Dollars	Profit Dollars	Profit Pct.
100030 MARLBORO SPEC BLEND RED BOX 100	20PK	CTN	53.90	37	.15	2.29	11		592.90	12.55	1380.50	787.60	57.05
100023 MARLBORO SILVER MENTHOL BOX 100	20PK	CTN	53.90	38	.15	2.44	11		592.90	12.55	1380.50	787.60	57.05
108300 B&H MENT 100 LT.	20PK	CTN	46.20	39	1.54	3.98	516		23839.20	6.19	31940.40	8101.20	25.36
115401 PALL MALL 100 BOX	20PK	CTN	40.06	40	1.56	5.54	153		6129.18	9.35	14305.50	8176.32	57.16
100016 MARLBORO GOLD 100	20PK	CTN	53.90	41	8.20	13.74	602		32447.80	12.55	75551.00	43103.20	57.05
100500 CAMEL FILTER 85 BOX	20PK	CTN	43.67	42	9.47	23.21	855		37337.85	10.19	87124.50	49786.65	57.14
119526 VIRGINIA SLIM SILVER MEN BOX 100	20PK	CTN	55.68	43	11.84	35.05	843		46938.24	12.95	109168.50	62230.26	57.00
113200 MARLBORO GOLD BOX 100	20PK	CTN	53.90	44	11.87	46.92	872		47000.80	12.55	109436.00	62435.20	57.05
120200 WINSTON 100 LIGHT	20PK	CTN	43.67	45	13.32	60.24	1203		52535.01	10.19	122585.70	70050.69	57.14
111700 KOOL MENT 100 MILD	20PK	CTN	43.67	46	16.65	76.89	1503		65636.01	10.19	153155.70	87519.69	57.14
118800 VANTAGE MENT 100	20PK	CTN	45.73	47	23.13	100.02	2001		91505.73	10.65	213106.50	121600.77	57.06
*** Class Totals ***							8728		412996.32		938785.95	525789.63	
Class 101 DISCOUNT CIGARETTES													
100037 BASIC GOLD BOX 100	20PK	CTN	51.30	1	.03	.03	2		102.60	7.35	147.00	44.40	30.20
100036 BASIC GOLD BOX KING	20PK	CTN	51.30	2	.04	.07	3		153.90	7.35	220.50	66.60	30.20
100035 BASIC BLUE 100	20PK	CTN	51.30	3	.04	.11	3		153.90	7.35	220.50	66.60	30.20
100034 BASIC BLUE BOX 100	20PK	CTN	51.30	4	.04	.15	3		153.90	7.35	220.50	66.60	30.20
100039 BASIC GOLD MENTHOL BOX 100	20PK	CTN	51.30	5	.06	.21	5		256.50	7.35	367.50	111.00	30.20
100038 BASIC GOLD MENTHOL BOX KING	20PK	CTN	51.30	6	.06	.27	5		256.50	7.35	367.50	111.00	30.20
100048 MERIT SILVER MENTHOL K/S	20PK	CTN	62.84	7	.11	.38	7		439.88	8.99	629.30	189.42	30.10
100042 MERIT BLUE 100	20PK	CTN	62.84	8	.11	.49	7		439.88	8.99	629.30	189.42	30.10
100040 MERIT BLUE BOX KING	20PK	CTN	62.84	9	.11	.60	7		439.88	8.99	629.30	189.42	30.10
100044 MERIT BRONZE BOX 100	20PK	CTN	62.84	10	.12	.72	8		502.72	8.99	719.20	216.48	30.10
100046 MERIT GOLD MENTHOL 100	20PK	CTN	62.84	11	.14	.86	9		565.56	8.99	809.10	243.54	30.10
100045 MERIT GOLD BOX KING	20PK	CTN	62.84	12	.14	1.00	9		565.56	8.99	809.10	243.54	30.10
100049 MERIT SILVER MENTHOL 100	20PK	CTN	62.84	13	.15	1.15	10		628.40	8.99	899.00	270.60	30.10
100047 MERIT GOLD 100	20PK	CTN	62.84	14	.15	1.30	10		628.40	8.99	899.00	270.60	30.10
100043 MERIT BRONZE BOX KING	20PK	CTN	62.84	15	.15	1.45	10		628.40	8.99	899.00	270.60	30.10
100041 MERIT BLUE BOX 100	20PK	CTN	62.84	16	.15	1.60	10		628.40	8.99	899.00	270.60	30.10
100033 BASIC BLUE BOX KING	20PK	CTN	51.30	17	.18	1.78	14		718.20	7.35	1029.00	310.80	30.20
102811 LIGGETT SELECT FF MENTH BOX 100	20PK	CTN	29.99	18	5.70	7.48	783		23482.17	4.29	33590.70	10108.53	30.09
125800 DORAL FF MENT 100	20PK	CTN	40.06	19	5.93	13.41	603		24156.18	5.75	34672.50	10516.32	30.33
102815 LIGGETT SELECT ULTRA 100 BX	20PK	CTN	29.99	20	10.81	24.22	1485		44535.15	4.29	63706.50	19171.35	30.09
130585 GPC 100 ULTRA BOX	20PK	CTN	34.79	21	12.40	36.62	1455		50619.45	4.99	72604.50	21985.05	30.28
101300 CARLITON MENTHOL	20PK	CTN	47.20	22	20.66	57.28	1805		85196.00	6.75	121837.50	36641.50	30.07
131761 BASIC FF 100 BOX	20PK	CTN	41.09	23	42.73	100.01	1503		61758.27	9.15	137524.50	75766.23	55.09
*** Class Totals ***							7756		297009.80		474330.00	177320.20	
*** Customer Totals ***							16484		710006.12		1413115.95	703109.83	

Velocity Report - Version 3 (continued)

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CDR Customer Conference        V E L O C I T Y   R E P O R T      JEANNINE    GSWBPFR      4/05/13 16:27:51 Page    3

                               (Customer By Class Summary)

   From: 01/01/13 To: 03/31/13    For -- B & D FOOD STORE                          HOUSTON                 TX    Cust #: 771230

      Class    Description           Purchases    % Of Total      Retail

      100      PREMIUM CIGARETTES     412996.32      58.17       938785.95
      101      DISCOUNT CIGARETTES    297009.80      41.83       474330.00

      Final totals                   710,006.12                1,413,115.95
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Customer By Class Summary

(Value of *C* entered for **Print Cust/Class *OR* Print Cust/Group Summary?** field.)

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CDR Customer Conference            V E L O C I T Y   R E P O R T     JEANNINE   BSKMPFR    4/08/13 10:58:55 Page     1

                                     (Customer By Class Summary)

        From: 01/01/13 To: 03/31/13           For -- B & D FOOD STORE           HOUSTON            TX   Cust #: 771230

        Class      Description                  Purchases    % Of Total      Retail

         100     PREMIUM CIGARETTES             412996.32      52.78       938785.95

         101     DISCOUNT CIGARETTES            297009.80      37.96       474330.00

         200     CHEWING TOBACCO                  4872.24        .62         5849.10

         201     SMOKING TOBACCO                 41570.10       5.31        90478.08

         202     MOIST SNUFF                     25800.00       3.30         4257.00

         300     CIGARS                            185.97        .02          250.95

        Final totals                           782,434.43              1,513,951.08

   ** END OF REPORT **
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Corporate By Class Summary

(Value of *C* entered for **Print Cust/Class *OR* Print Cust/Group Summary?** field.)

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CDR Customer Conference            V E L O C I T Y   R E P O R T     JEANNINE   BSKMPFR    4/08/13 15:11:38 Page    13

                                     (Corporate By Class Summary)

        From: 01/01/13 To: 03/31/13           For -- USA CONVENIENCE HEADQUARTERS  BATON ROUGE        LA    Corp #: 900100

        Class      Description                  Purchases    % Of Total      Retail

         100     PREMIUM CIGARETTES            1880233.12      84.35      2711193.60

         200     CHEWING TOBACCO                16880.08        .76         1850.64

         201     SMOKING TOBACCO               144818.70       6.50        31066.20

         202     MOIST SNUFF                   187175.84       8.40        35336.40

         300     CIGARS                            14.59        .00           19.70

        Final totals                         2,229,122.33              2,779,466.54

   ** END OF REPORT **
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Customer By Category Summary

(Value of *G* entered for **Print Cust/Class *OR* Print Cust/Group Summary?** field.)

```
CDR Customer Conference            V E L O C I T Y   R E P O R T     JEANNINE   BSKMPFR    4/08/13 12:09:36 Page     1

                                     (Customer By Category Summary)

        From: 01/01/13 To: 03/31/13           For -- B & D FOOD STORE           HOUSTON            TX   Cust #: 771230

        Category   Description                  Purchases    % Of Total      Retail

           1     CIGARETTES                     710006.12      90.74      1413115.95

           2     TOBACCO                         72242.34       9.23       100584.18

           3     CIGARS                            185.97        .02          250.95

        Final totals                           782,434.43              1,513,951.08

   ** END OF REPORT **
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Velocity Item Summary

(Value of *Y* entered for **Print Corp/Class Summary?** and

C entered for **Print Acct. Type/Item *OR* Print Corp/Item Summary?** field.)

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CDR Customer Conference        V E L O C I T Y (ITEM SUMMARY)     JEANNINE   BSLHPFR    4/08/13 12:29:58 Page  1

  From: 01/01/13 To: 03/31/13       For -- USA CONVENIENCE HEADQUARTERS     BATON ROUGE        LA     CORP. #    900100
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	Description	Unit	-Packed-	Rank	Item %	Cumm %	Whole Units	Each Units	Net Dollars	Retail Dollars	Profit Dollars	Profit Pct.
Category	1 CIGARETTES											
111700	KOOL MENT 100 MILD	CTN	20PK	1	24.76	24.76	13114		461743.94	667502.60	205758.66	30.83
119526	VIRGINIA SLIM SILVER MEN BOX 100	CTN	20PK	2	14.21	38.97	5886		269814.24	387887.40	118073.16	30.44
120200	WINSTON 100 LIGHT	CTN	20PK	3	13.23	52.20	7007		246716.47	356656.30	109939.83	30.83
115401	PALL MALL 100 BOX	CTN	20PK	4	12.73	64.93	7873		239811.58	345624.70	105813.12	30.62
113200	MARLBORO GOLD BOX 100	CTN	20PK	5	9.59	74.52	4063		182267.08	261948.70	79681.62	30.42
105500	CAMEL FILTER 85 BOX	CTN	20PK	6	8.99	83.51	4989		164237.88	238973.10	74735.22	31.27
108300	B&H MENT 100 LT.	CTN	20PK	7	7.80	91.31	4209		149419.50	214238.10	64818.60	30.26
100016	MARLBORO GOLD 100	CTN	20PK	8	5.32	96.63	2340		103006.80	147186.00	44179.20	30.02
118800	VANTAGE MENT 100	CTN	20PK	9	2.94	99.57	1475		55061.75	79502.50	24440.75	30.74
100008	MARLBORO BLUE MEN BOX K/S	CTN	20PK	10	.03	99.60	12		528.24	754.80	226.56	30.02
100009	MARLBORO GOLD BOX KING	CTN	20PK	11	.03	99.63	12		528.24	754.80	226.56	30.02
100006	MARLBORO BLEND BOX KING #54	CTN	20PK	12	.02	99.65	10		440.20	629.00	188.80	30.02
100011	MARLBORO GOLD KING	CTN	20PK	13	.02	99.67	9		396.18	566.10	169.92	30.02
100015	MARLBORO BLUE MEN 72	CTN	20PK	14	.02	99.69	9		396.18	566.10	169.92	30.02
100024	MARLBORO BLACK SPEC BLEND BOX KING	CTN	20PK	15	.02	99.71	9		396.18	566.10	169.92	30.02
100028	MARLBORO BLACK MEN SPEC BLEND B 100	CTN	20PK	16	.02	99.73	9		396.18	566.10	169.92	30.02
100001	MARLBORO BLEND BOX K/S SOFTPACK	CTN	20PK	17	.02	99.75	11		370.92	537.90	166.98	31.04
100017	MARLBORO RED LABEL BOX KING	CTN	20PK	18	.02	99.77	8		352.16	503.20	151.04	30.02
100054	VIRGINIA SLIM GOLD 120	CTN	20PK	19	.02	99.79	7		320.88	461.30	140.42	30.44
100003	MARLBORO BLACK BOX 100	CTN	20PK	20	.02	99.81	8		312.64	447.20	134.56	30.09
100053	VIRGINIA SLIM GOLD MEN 120	CTN	20PK	21	.01	99.82	6		275.04	395.40	120.36	30.44
100055	VIRGINIA SLIMS MENTHOL BOX 100	CTN	20PK	22	.01	99.83	6		275.04	395.40	120.36	30.44
100014	MARLBORO GREEN MEN 72	CTN	20PK	23	.01	99.84	6		264.12	377.40	113.28	30.02
100051	VIRGINIA SLIM GOLD BOX 100	CTN	20PK	24	.01	99.85	5		229.20	329.50	100.30	30.44
100057	VIRGINIA SLIM SILVER BOX 100	CTN	20PK	25	.01	99.86	5		229.20	329.50	100.30	30.44
100010	MARLBORO BLUE MEN BOX 100	CTN	20PK	26	.01	99.87	5		220.10	314.50	94.40	30.02
100056	VIRGINIA SLIMS MENTHOL 100	CTN	20PK	27	.01	99.88	4		183.36	263.60	80.24	30.44
100007	MARLBORO BLEND BOX 100 #54	CTN	20PK	28	.01	99.89	4		176.08	251.60	75.52	30.02
100013	MARLBORO BLUE MEN 72	CTN	20PK	29	.01	99.90	4		176.08	251.60	75.52	30.02
100027	MARLBORO BLACK SPEC BLEND BOX 100	CTN	20PK	30	.01	99.91	4		176.08	251.60	75.52	30.02
100004	MARLBORO BLACK MEN BOX 100	CTN	20PK	31	.01	99.92	4		156.32	223.60	67.28	30.09
100052	VIRGINIA SLIM GOLD MEN BOX 100	CTN	20PK	32	.01	99.93	3		137.52	197.70	60.18	30.44
100012	MARLBORO GOLD MEN BOX 100	CTN	20PK	33	.01	99.94	3		132.06	188.70	56.64	30.02
100026	MARLBORO BLACK MEN SPEC BLEND BX KS	CTN	20PK	34	.01	99.95	3		132.06	188.70	56.64	30.02
100002	MARLBORO BLACK BOX K/S SOFTPACK	CTN	20PK	35	.01	99.96	3		117.24	167.70	50.46	30.09
100005	MARLBORO BLEND BOX KING #27	CTN	20PK	36	.00	99.96	2		88.04	125.80	37.76	30.02
100018	MARLBORO RED LABEL BOX KING	CTN	20PK	37	.00	99.96	2		88.04	125.80	37.76	30.02
100019	MARLBORO SILVER BOX KING	CTN	20PK	38	.00	99.96	2		88.04	125.80	37.76	30.02
100020	MARLBORO SILVER BOX 100	CTN	20PK	39	.00	99.96	2		88.04	125.80	37.76	30.02

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CDR Customer Conference          V E L O C I T Y (ITEM SUMMARY)     JEANNINE   BSLHPFR     4/08/13 12:29:58 Page   2

 From: 01/01/13 To: 03/31/13      For -- USA CONVENIENCE HEADQUARTERS      BATON ROUGE        LA      CORP. #    900100
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Description	-Packed-	Unit	Rank	Item %	Cumm %	Whole Units	Each Units	Net Dollars	Retail Dollars	Profit Dollars	Profit Pct.
100021 MARLBORO SILVER BOX 72	20PK	CTN	40	.00	99.96	2		88.04	125.80	37.76	30.02
100023 MARLBORO SILVER MENTHOL BOX 100	20PK	CTN	41	.00	99.96	2		88.04	125.80	37.76	30.02
100030 MARLBORO SPEC BLEND RED BOX 100	20PK	CTN	42	.00	99.96	2		88.04	125.80	37.76	30.02
100031 MARLBORO VIRGINIA BLEND BOX KING	20PK	CTN	43	.00	99.96	2		88.04	125.80	37.76	30.02
100022 MARLBORO SILVER MENTHOL BOX KING	20PK	CTN	44	.00	99.96	1		44.02	62.90	18.88	30.02
100029 MARLBORO SPEC BLEND RED BOX KING	20PK	CTN	45	.00	99.96	1		44.02	62.90	18.88	30.02
100032 MARLBORO VIRGINIA BLEND BOX 100	20PK	CTN	46	.00	99.96	1		44.02	62.90	18.88	30.02
*** Category Totals ***						51144		1880233.12	2711193.60	830960.48	
*** Corporate Totals ***						51144		1880233.12	2711193.60	830960.48	

Final totals
** END OF REPORT **

Velocity Summary By Item

(Value of *Y* entered for **Print Item Summary?** field.)

Item/UPC	Description	-Packed-	U/M	Whole Units	Each Units	Net Dollars	Retail Dollars	Profit Dollars	Profit Pct.
	Category 1 CIGARETTES								
108300	B&H MENT 100 LT.	20PK	CTN	516		23839.20	31940.40	8101.20	.25
100033	BASIC BLUE BOX KING	20PK	CTN	14		718.20	1029.00	310.80	.30
100034	BASIC BLUE BOX 100	20PK	CTN	3		153.90	220.50	66.60	.30
100035	BASIC BLUE 100	20PK	CTN	3		153.90	220.50	66.60	.30
131761	BASIC FF 100 BOX	20PK	CTN	1503		61758.27	137524.50	75766.23	.55
100036	BASIC GOLD BOX KING	20PK	CTN	3		153.90	220.50	66.60	.30
100037	BASIC GOLD BOX 100	20PK	CTN	2		102.60	147.00	44.40	.30
100038	BASIC GOLD MENTHOL BOX KING	20PK	CTN	5		256.50	367.50	111.00	.30
100039	BASIC GOLD MENTHOL BOX 100	20PK	CTN	5		256.50	367.50	111.00	.30
100500	CAMEL FILTER 85 BOX	20PK	CTN	855		37337.85	87124.50	49786.65	.57
101300	CARLTON MENTHOL	20PK	CTN	1805		85196.00	121837.50	36641.50	.30
125800	DORAL FF MENT 100	20PK	CTN	603		24156.18	34672.50	10516.32	.30
130585	GPC 100 ULTRA BOX	20PK	CTN	1455		50619.45	72604.50	21985.05	.30
111700	KOOL MENT 100 MILD	20PK	CTN	1503		65636.01	153155.70	87519.69	.57
102811	LIGGETT SELECT FF MENTH BOX 100	20PK	CTN	783		23482.17	33590.70	10108.53	.30
102815	LIGGETT SELECT ULTRA 100 BX	20PK	CTN	1485		44535.15	63706.50	19171.35	.30
100002	MARLBORO BLACK BOX K/S SOFTPACK	20PK	CTN	3		146.70	341.70	195.00	.57
100003	MARLBORO BLACK BOX 100	20PK	CTN	3		146.70	341.70	195.00	.57
100058	MARLBORO BLACK BOX 100 B2G$2	20PK	CTN	3		146.70	341.25	194.55	.57
100004	MARLBORO BLACK MEN BOX 100	20PK	CTN	5		244.50	569.50	325.00	.57
100028	MARLBORO BLACK MEN SPEC BLEND B 100	20PK	CTN	3		161.70	376.50	214.80	.57
100026	MARLBORO BLACK MEN SPEC BLEND BX KS	20PK	CTN	3		161.70	376.50	214.80	.57
100024	MARLBORO BLACK SPEC BLEND BOX KING	20PK	CTN	3		161.70	376.50	214.80	.57
100027	MARLBORO BLACK SPEC BLEND BOX 100	20PK	CTN	7		377.30	878.50	501.20	.57
100001	MARLBORO BLEND BOX K/S SOFTPACK	20PK	CTN	5		219.50	512.50	293.00	.57
100005	MARLBORO BLEND BOX KING #27	20PK	CTN	3		161.70	376.50	214.80	.57
100006	MARLBORO BLEND BOX KING #54	20PK	CTN	3		161.70	376.50	214.80	.57
100007	MARLBORO BLEND BOX 100 #54	20PK	CTN	6		323.40	753.00	429.60	.57
100008	MARLBORO BLUE MEN BOX K/S	20PK	CTN	6		323.40	753.00	429.60	.57
100010	MARLBORO BLUE MEN BOX 100	20PK	CTN	2		107.80	251.00	143.20	.57
100013	MARLBORO BLUE MEN 72	20PK	CTN	4		215.60	502.00	286.40	.57
100009	MARLBORO GOLD BOX KING	20PK	CTN	2		107.80	251.00	143.20	.57
113200	MARLBORO GOLD BOX 100	20PK	CTN	872		47000.80	109436.00	62435.20	.57
100011	MARLBORO GOLD KING	20PK	CTN	2		107.80	251.00	143.20	.57
100012	MARLBORO GOLD MEN BOX 100	20PK	CTN	2		107.80	251.00	143.20	.57
100016	MARLBORO GOLD 100	20PK	CTN	602		32447.80	75551.00	43103.20	.57
100014	MARLBORO GREEN MEN 72	20PK	CTN	2		107.80	251.00	143.20	.57
100017	MARLBORO RED LABEL BOX KING	20PK	CTN	2		107.80	251.00	143.20	.57
100018	MARLBORO RED LABEL BOX 100	20PK	CTN	6		323.40	753.00	429.60	.57
100019	MARLBORO SILVER BOX KING	20PK	CTN	9		485.10	1129.50	644.40	.57
100020	MARLBORO SILVER BOX 100	20PK	CTN	6		323.40	753.00	429.60	.57

Item/UPC	Description	-Packed-	U/M	Whole Units	Each Units	Net Dollars	Retail Dollars	Profit Dollars	Profit Pct.
100021	MARLBORO SILVER BOX 72	20PK	CTN	9		485.10	1129.50	644.40	.57
100022	MARLBORO SILVER MENTHOL BOX KING	20PK	CTN	9		485.10	1129.50	644.40	.57
100023	MARLBORO SILVER MENTHOL BOX 100	20PK	CTN	11		592.90	1380.50	787.60	.57
100029	MARLBORO SPEC BLEND RED BOX KING	20PK	CTN	9		485.10	1129.50	644.40	.57
100030	MARLBORO SPEC BLEND RED BOX 100	20PK	CTN	11		592.90	1380.50	787.60	.57
100031	MARLBORO VIRGINIA BLEND BOX KING	20PK	CTN	8		431.20	1004.00	572.80	.57
100032	MARLBORO VIRGINIA BLEND BOX 100	20PK	CTN	8		431.20	1004.00	572.80	.57
100040	MERIT BLUE BOX KING	20PK	CTN	7		439.88	629.30	189.42	.30
100041	MERIT BLUE BOX 100	20PK	CTN	10		628.40	899.00	270.60	.30
100042	MERIT BLUE 100	20PK	CTN	7		439.88	629.30	189.42	.30
100043	MERIT BRONZE BOX KING	20PK	CTN	10		628.40	899.00	270.60	.30
100044	MERIT BRONZE BOX 100	20PK	CTN	8		502.72	719.20	216.48	.30
100045	MERIT GOLD BOX KING	20PK	CTN	9		565.56	809.10	243.54	.30
100046	MERIT GOLD MENTHOL 100	20PK	CTN	9		565.56	809.10	243.54	.30
100047	MERIT GOLD 100	20PK	CTN	10		628.40	899.00	270.60	.30
100048	MERIT SILVER MENTHOL K/S	20PK	CTN	7		439.88	629.30	189.42	.30
100049	MERIT SILVER MENTHOL 100	20PK	CTN	10		628.40	899.00	270.60	.30
115401	PALL MALL 100 BOX	20PK	CTN	153		6129.18	14305.50	8176.32	.57
118800	VANTAGE MENT 100	20PK	CTN	2001		91505.73	213106.50	121600.77	.57
100051	VIRGINIA SLIM GOLD BOX 100	20PK	CTN	3		167.04	388.50	221.46	.57
100052	VIRGINIA SLIM GOLD MEN BOX 100	20PK	CTN	3		167.04	388.50	221.46	.57
100053	VIRGINIA SLIM GOLD MEN 120	20PK	CTN	3		167.04	388.50	221.46	.57
100054	VIRGINIA SLIM GOLD 120	20PK	CTN	3		167.04	388.50	221.46	.57
100057	VIRGINIA SLIM SILVER BOX 100	20PK	CTN	3		167.04	388.50	221.46	.57
119526	VIRGINIA SLIM SILVER MEN BOX 100	20PK	CTN	843		46938.24	109168.50	62230.26	.57
100055	VIRGINIA SLIMS MENTHOL BOX 100	20PK	CTN	5		278.40	647.50	369.10	.57
100056	VIRGINIA SLIMS MENTHOL 100	20PK	CTN	5		278.40	647.50	369.10	.57
120200	WINSTON 100 LIGHT	20PK	CTN	1203		52535.01	122585.70	70050.69	.57
	*** Category Totals ***			16484		710006.12	1413115.95	703109.83	
Final totals				16484		710006.12	1413115.95	703109.83	

** END OF REPORT **

Veloc. Item/Cust Summary

(Value of *Y* entered for **Print Item/Cust Summary?** field.)

```
CDR Customer Conference              Veloc. Item/Cust Summary         JEANNINE   GWR6PFR    4/08/13 13:37:03 Page     1

       From: 01/01/13 To: 03/31/13

          Cust #     Name                                             Full    Eaches     Dollars

     Item/UPC: 306557          WHITE OWL BLUNT GRAPE
           99000  99 MART PLUS                                          3                  48.75
          100001  STOP 'N SHOP                                          1                  16.25
          100003  BOB'S SHELL                                           5                  81.25
          100222  TODD'S COUNTRY CORNER                                 1                  16.25
          100301  THREE RIVERS CHEVRON                                  1                  16.25
          100801  BARON EXPRESS #2 BP                                   2                  32.50
          100802  CRANKY CORNER QUICK STOP                              3                  48.75
          100850  EXPRESS WAY FOOD MART                                 2                  29.18
          100857  JR FOOD MART - FOLSOM                                 1                  16.25
          100900  JR FOOD MART - ABITA                                  1                  16.25
          300133  SAIA'S SUPERMARKET                                   26                 422.50
          320033  KINGS GROCERY                                         1                  16.25
          320055  OCEAN SPRINGS QUICK STOP                             13                 211.25
          320091  LIL SHORT STOP - VANCLEVE                             1                  16.25
          320092  LIL SHORT STOP - OCEAN SPRINGS                        1                  16.25
          380100  MISSISSIPPI STOP N GO                                 1                  16.25
          380110  MISS STOP N GO #110                                   2                  32.50
          500101  UNION GROVE GROCERY                                   2                  32.50
          700180  L & M GROCERY                                         5                  81.25
          770005  PARK IT MARKET                                        1                  16.25
          771230  B & D FOOD STORE                                      3                  48.75
          800237  DANNY & CLYDE'S FOOD STORE #20                        1                  16.25
          800333  KINGS FOREST EXXON                                    1                  16.25
          900600  USA CONVENIENCE STORE #600                            1                  14.59

     Totals For: 306557        WHITE OWL BLUNT GRAPE                   79                1278.77
```

```
CDR Customer Conference              Veloc. Item/Cust Summary         JEANNINE   GWR6PFR    4/08/13 13:37:03 Page     2

       From: 01/01/13 To: 03/31/13

          Cust #     Name                                             Full    Eaches     Dollars

     Item/UPC: 303778          WINCHESTER LITTLE CIGAR
           99000  99 MART PLUS                                          3                 137.22
          100001  STOP 'N SHOP                                          1                  39.70
          100003  BOB'S SHELL                                           5                 198.50
          100222  TODD'S COUNTRY CORNER                                 1                  39.70
          100301  THREE RIVERS CHEVRON                                  1                  39.70
          100801  BARON EXPRESS #2 BP                                   2                  79.40
          100802  CRANKY CORNER QUICK STOP                              3                 119.10
          100850  EXPRESS WAY FOOD MART                                 2                  72.80
          100857  JR FOOD MART - FOLSOM                                 1                  39.70
          100900  JR FOOD MART - ABITA                                  1                  39.70
          300133  SAIA'S SUPERMARKET                                   25                 992.50
          320033  KINGS GROCERY                                         1                  38.26
          320055  OCEAN SPRINGS QUICK STOP                             13                 497.38
          320091  LIL SHORT STOP - VANCLEVE                             1                  38.26
          320092  LIL SHORT STOP - OCEAN SPRINGS                        1                  38.26
          380100  MISSISSIPPI STOP N GO                                 1                  38.26
          380110  MISS STOP N GO #110                                   2                  76.52
          500101  UNION GROVE GROCERY                                   2                  79.40
          700180  L & M GROCERY                                         5                 198.50
          770005  PARK IT MARKET                                        1                  45.74
          771230  B & D FOOD STORE                                      3                 137.22
          800237  DANNY & CLYDE'S FOOD STORE #20                        1                  39.70
          800333  KINGS FOREST EXXON                                    1                  39.70

     Totals For: 303778        WINCHESTER LITTLE CIGAR                 77                3065.22

     Final totals                                                     156                4343.99

     ** END OF REPORT **
```

Printing A Customer Weekly Movement Report

The Customer Weekly Movement Report details 12 weeks of item movement for one or more customers.

```
User: JEANNINE              Menu: CUSPCV1              Date:  2/25/08

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

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

1. Select option 4 (Customer Weekly Report) from the Special Customer Reports screen. The Display For Cust Movement screen appears.

```
BSOPDFR    DISPLAY Creative Data Research, Inc.           2/25/08 15:04:34
                        Display For Cust Movement
      Customer Name                    Cust #  Corp #  Slsman  Demographic

Start Date -->        Report Will Contain 12 Weeks Prior To The Date Entered.
Beg. Cls       End Cls       Sort: 2  (1=Item #, 2=Vendor)  JOBQ BOOK

Type options, press Enter.
M=Mark   U=Unmark

?     Customer Name                    Cust #  Corp #  Slsman  Demographic
      B & D FOOD STORE                 771230  771230  20
      BARON EXPRESS #2 BP              100801  100801  10
      BIG P MINI MART                  320001  320001  20
      BOB'S SHELL                      100003  100003  10
      CRANKY CORNER QUICK STOP         100802  100802  20
      DANNY & CLYDE'S FOOD STORE #20   800237  800237  20
      DIANNE'S GROCERY                 100002  100002  10
      EXPRESS WAY FOOD MART            100850  100850  20
      GAS-N-SHOP #6                    100855  100855  10
      JR FOOD MART - ABITA             100900  100900  20              +

F1=Selected Only   F2=Show All   F3=Exit   F6=Submit Print
```

2. Enter a date for the **Start Date** (6,n) field to limit the report of item movement to the 12 weeks prior to the designated date.

3. Enter sales class numbers for the **Beg Cls** and **End Cls** (5,n) fields.

4. Enter one of the following values to designate the sorting criteria:
   - *1* - item number.
   - *2* - vendor code.

5. If necessary, enter another job queue for the **JobQ** (10,a) field.

6. Use <Page Down> to find the desired customers, enter M (Mark) in the selection column next to each customer name, and press <Enter>.

7. Press <F6> to print.

Customer Weekly Movement Report

```
Creative Data Research, Inc.        Customer Weekly Movement Report     JEANNINE   GSVVPFR   2/25/08 14:48:51 Page    1
                                    ***** Movement Over 12 Weeks *****

   Item #   Description                     Week 1       Week 2       Week 3       Week 4       Week 5       Week 6
                                            Week 7       Week 8       Week 9       Week 10      Week 11      Week 12

   Customer Number 100002  DIANNE'S GROCERY                Start Date:  2/25/08

        Vendor Number BIC001   BIC CORPORATION

   902400   BIC CLASSIC MED BLACK 2PK        2 EA         0 EA         2 EA         0 EA         0 EA         4 EA
                                             0 EA         0 EA         0 EA         0 EA         0 EA         0 EA   Total:        8
            ----------------------------------------------------------------------------------------------------
   802680   BIC LIGHTER COMFORT LITE         0 EA         0 EA         2 EA         0 EA         0 EA         3 EA
                                             0 EA         0 EA         0 EA         0 EA         0 EA         0 EA   Total:        5
            ----------------------------------------------------------------------------------------------------
   802662   BIC LIGHTER MINI CLASSIC 3PK     2 PK         0 PK         2 PK         0 PK         0 PK         4 PK
                                             0 PK         0 PK         0 PK         0 PK         0 PK         0 PK   Total:        8
            ----------------------------------------------------------------------------------------------------
   902026   BIC RED CHRYSTAL                 2 EA         0 EA         2 EA         0 EA         0 EA         3 EA
                                             0 EA         0 EA         0 EA         0 EA         0 EA         0 EA   Total:        7
            ----------------------------------------------------------------------------------------------------
   902663   ZIPPO BLACK MATT                 2 EA         0 EA         2 EA         0 EA         0 EA         4 EA
                                             0 EA         0 EA         0 EA         0 EA         0 EA         0 EA   Total:        8
            ----------------------------------------------------------------------------------------------------

        Vendor Number HER001   HERSHEY CHOCOLATE

   418950   HERSHEY ALMOND 36CT              2 BOX        0 BOX        2 BOX        0 BOX        0 BOX        3 BOX
                                             0 BOX        0 BOX        0 BOX        0 BOX        0 BOX        0 BOX  Total:        7
            ----------------------------------------------------------------------------------------------------
   439635   HERSHEY BITES 11 OZ              2 BAG        0 BAG        2 BAG        0 BAG        0 BAG        4 BAG
                                             0 BAG        0 BAG        0 BAG        0 BAG        0 BAG        0 BAG  Total:        8
            ----------------------------------------------------------------------------------------------------
   616600   HERSHEY CHOCOLATE SYRUP BOTTLE 24OZ 2 EA      0 EA         2 EA         0 EA         0 EA         4 EA
                                             0 EA         0 EA         0 EA         0 EA         0 EA         0 EA   Total:        8
            ----------------------------------------------------------------------------------------------------
   439397   HERSHEY HUGS  12 OZ              2 BAG        0 BAG        2 BAG        0 BAG        0 BAG        3 BAG
                                             0 BAG        0 BAG        0 BAG        0 BAG        0 BAG        0 BAG  Total:        7
            ----------------------------------------------------------------------------------------------------
   439394   HERSHEY KISSES  12 OZ            0 CSE        0 CSE        2 CSE        0 CSE        0 CSE        4 CSE
                                             0 CSE        0 CSE        0 CSE        0 CSE        0 CSE        0 CSE  Total:        6
            ----------------------------------------------------------------------------------------------------
   439393   HERSHEY MINIATURES 12 OZ         0 CS         0 CS         2 CS         0 CS         0 CS         3 CS
                                             0 CS         0 CS         0 CS         0 CS         0 CS         0 CS   Total:        5
            ----------------------------------------------------------------------------------------------------
   403078   HERSHEY NUGGET ASSORTED          0 CS         0 CS         2 CS         0 CS         0 CS         4 CS
                                             0 CS         0 CS         0 CS         0 CS         0 CS         0 CS   Total:        6
            ----------------------------------------------------------------------------------------------------
   439336   HERSHEY PLAIN GIANT BAR          0 BOX        0 BOX        2 BOX        0 BOX        0 BOX        3 BOX
                                             0 BOX        0 BOX        0 BOX        0 BOX        0 BOX        0 BOX  Total:        5
            ----------------------------------------------------------------------------------------------------

        Vendor Number KEE001   KEEBLER COMPANY

   561158   KEEBLER CHIPS DELUXE  2OZ        2 CTN        0 CTN        2 CTN        0 CTN        0 CTN        3 CTN
                                             0 CTN        0 CTN        0 CTN        0 CTN        0 CTN        0 CTN  Total:        7
            ----------------------------------------------------------------------------------------------------
   561759   KEEBLER CLUB CRACKER  5.25 OZ    2 BOX        0 BOX        2 BOX        0 BOX        0 BOX        4 BOX
                                             0 BOX        0 BOX        0 BOX        0 BOX        0 BOX        0 BOX  Total:        8
            ----------------------------------------------------------------------------------------------------
   631127   KEEBLER FUDGE STRIPE COOKIES 11.5OZ 2 BAG     0 BAG        2 BAG        0 BAG        0 BAG        3 BAG
                                             0 BAG        0 BAG        0 BAG        0 BAG        0 BAG        0 BAG  Total:        7
            ----------------------------------------------------------------------------------------------------
   561161   KEEBLER PECAN SANDIES  2 OZ      2 BOX        0 BOX        2 BOX        0 BOX        0 BOX        4 BOX
                                             0 BOX        0 BOX        0 BOX        0 BOX        0 BOX        0 BOX  Total:        8
            ----------------------------------------------------------------------------------------------------
   561167   KEEBLER VIENNA CREMES 2OZ        2 CTN        0 CTN        2 CTN        0 CTN        0 CTN        3 CTN
                                             0 CTN        0 CTN        0 CTN        0 CTN        0 CTN        0 CTN  Total:        7
            ----------------------------------------------------------------------------------------------------

        Vendor Number LIG001   LIGGETT & MEYERS TOBACCO

   102811   LIGGETT SELECT FF MENTH BOX 100  2 CTN        0 CTN        2 CTN        0 CTN        0 CTN        4 CTN
                                             0 CTN        0 CTN        0 CTN        0 CTN        0 CTN        0 CTN  Total:        8
            ----------------------------------------------------------------------------------------------------
   102815   LIGGETT SELECT ULTRA 100 BX      2 CTN        0 CTN        2 CTN        0 CTN        0 CTN        3 CTN
                                             0 CTN        0 CTN        0 CTN        0 CTN        0 CTN        0 CTN  Total:        7
            ----------------------------------------------------------------------------------------------------
```

Customer File Maintenance (Rev. 6/06/22)   **141**

Printing Future Price Changes Reports

The Future Price Changes reports, which are based on the global price change records, are printed for customers who require notification of future price changes. Refer to Working With Global Price Changes of the Item File Maintenance document for additional information.

Refer to Printing An Upcoming Price Changes Report below for a sample of the Upcoming Price Changes report that is printed automatically when users print the Future Price Changes report.

Future Price Change reports:
- List the customer's price, the retail, and the retails' profit percentage before and after the global price change takes effect.
- List the date of the changes.
- Include only items for which notification is designated in the global price change record. Refer to Working With Global Price Changes of the Item File Maintenance document for information about the **Notify** field.
- Are printed only for customers who require notification (with one exception described in the instructions below). Refer to Working With Customers above for information about the **Notify Price Chg** field.
- Are limited to customers and items for which customer/item records exist. Refer to Working With Customer/Item Records of the Billing File Maintenance document for additional information.

The universal product code (UPC) number which is printed on Future Price Changes reports is the UPC of an item's standard selling level unless another unit of measure is designated by the **Price Chg. Rpt. UPC U/M** field of the SYS015 default system option. Refer to the DAC Default System Options document for additional information.

The customer's price and retail at the standard selling unit appear on the reports by default, but can be overridden. Refer to Using A Different U/M For Prices below for information about using a customer's invoice options record to designate a different unit of measure.

Users also have the option of generating and printing a batch of retail shelf labels when printing a Future Price Changes report for a single customer. Refer to the Retail Shelf Labels document for additional information.

When the **Generate Retail Label Batches?** option is used, as described in the following instructions, labels are included in a batch for only the items with retail prices that are changed by the price change. Label batches are only generated for a

customer if *Y* for yes is entered for the **Retail Labels?** field of the customer's record. Refer to Working With Customers for additional information.

Refer to Printing Price Change Notifications below for information about the Notify of Price Changes reports that are printed *after* global price changes have been made.

```
    User: JEANNINE              Menu: CUSPCV1              Date:  8/20/13

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

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

1. Select option 8 (Print Future Price Changes) from the Special Customer Reports screen. The Print Future Price Changes screen appears.

```
    GSG2PVR     ENTER   CDR Customer Conference            8/20/13 14:24:56
                        Print Future Price Changes



    Corporate Number  . . . . . . .   _____   (Leave blank for all customers)
       ** O R **
    Customer Number . . . . . . . .   _____   (Leave blank for all customers)

    Limit to notified customers only?  _(Y/N)

    Print changes effective from  .   _____ to _____

    Use Allowances? . . . . . . . .   _ (Y, N, Blank)

    Purge old change details? . . .   N (Y/N)

    Generate Retail Label Batches?    _ (Y, N, Blank)




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

2. To print a report for a single customer, enter the customer number for the **Customer Number** (6,n) field, or press <F4> to select a number from the Select Customer Master screen.

3. To print reports for more than one customer, leave the **Customer Number** field blank, and enter *Y* (yes) for the **Limit to notified customers only?** (1,a) field.

4. Enter a range of dates for the **Print changes effective from** and **to** (6,n) fields to limit the changes which are included in the report.

5. To include selling allowances in the calculation of the item's prices, enter *Y* (yes) for the **Use Allowances?** (1,a) field.

6. To eliminate price change records for which reports have been printed, enter *Y* (yes) for the **Purge old change details** (1,a) field.

7. To print reports for more than one customer, press <F6> (Print) and press <Enter> to confirm. The Special Customer Reports screen appears.

8. To generate retail shelf label batches with the report for a single customer, enter *Y* (yes) for the **Generate Retail Label Batches?** (1,a) field, and press <Enter>.

```
GSG2PVR     ENTER    CDR Customer Conference                    8/20/13 14:26:44
                             Print Future Price Changes



   Corporate Number  . . . . . . .    _____  (Leave blank for all customers)
      ** O R **
   Customer Number . . . . . . . .    100002  (Leave blank for all customers)

   Limit to notified customers only?  _(Y/N)

   Print changes effective from  .    82013 to  83013

   Use Allowances? . . . . . . . .    _ (Y, N, Blank)

   Purge old change details? . . .    N (Y/N)

   Generate Retail Label Batches?     Y (Y, N, Blank)
                     Print Retail?    _ (Y, N, Blank)
                    UPC To Print :    _ (1-4, Blank)
                Auto Print Batches?   _ (Y, N, Blank)

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

9. Enter data for the following fields:
   • **Print Retail?** (1,a) field - enter *Y* (yes) to designate that retail prices are printed on the label if possible.

   • **UPC To Print** (1,n) field - enter *1*, *2*, *3* or *4* to designate which UPC numbers are printed on the labels if possible.

   • **Auto Print Batches?** (1,a) field - enter *Y* (yes) to designate that the labels are automatically printed.

10. Press <F6> (Print) and press <Enter> to confirm. The Special Customer Reports screen appears.

Future Price Changes Reports

```
Creative Data Research, Inc.          Future Price Changes          JEANNINE    GSG0PFR    3/31/08 14:48:09 Page      1

Customer Customer Name
Number

100002    DIANNE'S GROCERY
78352 HWY 437
COVINGTON                    LA 70435

Item    Whs.                                UPC Number      Price     Price      Retail  Prof.%   Retail  Prof.%   Date of
Number  Code                                                Before    After      Before  Before   After   After    Change

418950 1      HERSHEY ALMOND 36CT           03400024100     14.160    14.260 |     .69   42.99     .79   49.85   4/01/08

439635 1      HERSHEY BITES 11 OZ           03400092320     21.860    21.960 |    2.99   39.07    3.09   40.77   4/01/08

439397 1      HERSHEY HUGS  12 OZ           03400011000     29.060    29.170 |   39.50   26.43   39.60   26.33   4/01/08

439394 1      HERSHEY KISSES  12 OZ         03400013000     58.130    58.230 |    6.95   30.29    7.05   31.17   4/01/08

439393 1      HERSHEY MINIATURES 12 OZ      03400021303     58.130    58.230 |    3.95   38.68    4.05   40.09   4/01/08

403078 1      HERSHEY NUGGET ASSORTED       03400001688     59.900    60.000 |   10.85   53.99   10.95   54.33   4/01/08

439336 1      HERSHEY PLAIN GIANT BAR       03400019036     31.800    31.900 |    2.15   38.37    2.25   40.92   4/01/08
```

```
Creative Data Research, Inc.          Future Price Changes          JEANNINE    GSG0PFR    3/31/08 14:48:09 Page      2

Customer Customer Name
Number

100802    CRANKY CORNER QUICK STOP
28098 HWY 40
FOLSOM                       LA 70444

Item    Whs.                                UPC Number      Price     Price      Retail  Prof.%   Retail  Prof.%   Date of
Number  Code                                                Before    After      Before  Before   After   After    Change

418950 1      HERSHEY ALMOND 36CT           03400024100     16.560    16.660 |     .69   33.33     .79   41.42   4/01/08

439635 1      HERSHEY BITES 11 OZ           03400092320     26.400    26.500 |    2.99   26.42    3.09   28.53   4/01/08

439397 1      HERSHEY HUGS  12 OZ           03400011000     35.100    35.200 |   39.50   11.13   39.60   11.11   4/01/08

439394 1      HERSHEY KISSES  12 OZ         03400013000     70.200    70.300 |    6.95   15.82    7.05   16.90   4/01/08

439393 1      HERSHEY MINIATURES 12 OZ      03400021303     70.200    70.300 |    3.95   25.94    4.05   27.67   4/01/08

403078 1      HERSHEY NUGGET ASSORTED       03400001688     70.000    70.100 |   10.85   46.23   10.95   46.65   4/01/08

439336 1      HERSHEY PLAIN GIANT BAR       03400019036     38.400    38.500 |    2.15   25.58    2.25   28.70   4/01/08

Final totals

** END OF REPORT **
```

Using A Different U/M For Prices

Users have the option of overriding the standard selling unit as the one used for designating the price and retail appearing in the Future Price Changes reports printed for a specific customer. The instructions below describe using a customer's invoice option record to designate the desired unit of measure.

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

2. Select option 3 (Billing Related Maintenance) from the File Maintenance screen. The Billing File Maintenance #1 screen appears.

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

```
    User: JEANNINE              Menu: BFM2CV1              Date:  8/21/13

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

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

```
BSRJDFR    DISPLAY CDR Customer Conference              8/21/13 11:47:28
                     Work With Customer Invoice Options
 Position  Edit
 Customer  Customer
 _____    _____

Type options, press Enter.
2=Edit Record

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

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

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

```
BSRFE1R    CHANGE  CDR Customer Conference              8/21/13 11:50:03
                        Customer Invoice Options

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


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

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

```
CVW2PVR    ENTER   CDR Customer Conference              8/21/13 11:50:03
                        Edit More Upc Options

Type choices, press Enter.

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

For UPC with Length of . . .    ___

Drop First . . . . . . . . .    ___
Drop Last  . . . . . . . . .    ___

Leading Zeros to Append 1-3     ___

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




F3=Exit
```

7. Enter *1*, *2*, *3* or *4* for the **U/M For Future Price Chg Rpt** (1,n) field, and press
    <Enter>.

8. Press <Enter> when prompted to confirm. The Customer Invoice Options screen
    appears.

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

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

Printing An Upcoming Price Changes Report

The Upcoming Price Changes report is based on global price change records. It lists the current pricing, the change prices, and the date set for all the changes that fall within a designated date range.

It is strongly recommended that the Upcoming Price Changes report is printed before using the Perform Global Price Changes application. Refer to Working With Global Price Changes of the Item File Maintenance document for additional information.

The Upcoming Price Changes report prints automatically when users print Future Price Changes reports for customers. Refer to Printing Future Price Changes Reports above for additional information.

Refer to Printing Price Change Notifications below for information about the Notify of Price Changes reports that are printed *after* global price changes have been made.

```
User: JEANNINE              Menu: CUSPCV1              Date:  8/20/13

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

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

1. Select option 8 (Print Future Price Changes) from the Special Customer Reports screen. The Print Future Price Changes screen appears.

```
GSG2PVR    ENTER   CDR Customer Conference              8/20/13 14:24:56
                    Print Future Price Changes



Corporate Number  . . . . . . .    _____   (Leave blank for all customers)
   ** O R **
Customer Number . . . . . . . .    _____   (Leave blank for all customers)

Limit to notified customers only?  _(Y/N)

Print changes effective from  .   _____  to _____

Use Allowances? . . . . . . . .    _ (Y, N, Blank)

Purge old change details? . . .    N (Y/N)

Generate Retail Label Batches?    _ (Y, N, Blank)




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

2. Enter a range of dates for the **Print changes effective from** and **to** (6,n) fields to limit the changes which are included in the report.

3. To eliminate price change records for which reports have been printed, enter *Y* (yes) for the **Purge old change details** (1,a) field.

4. Press <F6> (Print) and press <Enter> to confirm. The Special Customer Reports screen appears.

```
 User: JEANNINE              Menu: CUSPCV1             Date:  8/21/13

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

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

Upcoming Price Chages Report

Creative Data Research, Inc.   Upcoming Price Changes   JEANNINE   GSIZPFR   5/09/08 11:16:41 Page   1

Item Number	Whse.	Description	Alt. Price	Net Before	Cost After	Base Before	Cost After	List Before	Price After	Suggested Before	Retail After	Apply Date
418950	1	HERSHEY ALMOND 36CT		13.050	13.150	13.050	13.150	16.560	16.660	.69	.79	5/09/08
439635	1	HERSHEY BITES 11 OZ		20.800	20.900	21.120	21.220	26.400	26.500	2.99	3.09	5/09/08
439397	1	HERSHEY HUGS 12 OZ		27.520	27.620	28.080	28.180	35.100	35.200	39.50	39.60	5/09/08
439394	1	HERSHEY KISSES 12 OZ		55.040	55.140	56.160	56.260	70.200	70.300	6.95	7.05	5/09/08
439393	1	HERSHEY MINIATURES 12 OZ		55.040	55.140	56.160	56.260	70.200	70.300	3.95	4.05	5/09/08
403078	1	HERSHEY NUGGET ASSORTED		56.710	56.810	57.870	57.970	70.000	70.100	10.85	10.95	5/09/08
439336	1	HERSHEY PLAIN GIANT BAR		30.110	30.210	30.720	30.820	38.400	38.500	2.15	2.25	5/09/08

** END OF REPORT **

Printing Price Change Notifications

The Notify of Price Changes reports, also called price change notifications, are printed for customers after a global price change has been made. Refer to Working With Global Price Changes of the Item File Maintenance document for additional information.

If outbound email functionality is enabled on the distributor's system, price change notifications can be automatically emailed as PDF file attachments to customers when the Notify of Price Changes reports are printed. Refer to Emailing Price Change Notifications of the System File Maintenance document for additional information.

Price change notifications:
- List the customer's price and retail before and after the global price change was made, and the date of each change.
- Include only items for which notification was designated in the global price change record. Refer to Working With Global Price Changes of the Item File Maintenance document for information about the **Notify** field.
- Are printed only for customers who require notification. Refer to Working With Customers above for information about the **Notify Price Chg** field.
- Are limited to customers who are authorized to purchase changed items. Refer to Working With Customer/Item Records of the Billing File Maintenance document for additional information.

As described in the instructions below, price change notifications can be printed only once after global price changes are made.

The universal product code (UPC) number which is printed on price change notifications will be the UPC of an item's standard selling level unless another unit of measure is designated by the **Price Chg. Rpt. UPC U/M** field of the SYS015 default system option. Refer to the DAC Default System Options document for additional information. Note: The customer's price and retail at the standard selling level appear on the price change notifications regardless of the U/M that is printed.

When an item's list price changes, a *$* (dollar sign) can be printed on invoices next to its unit price for 14 days after the change occurs. Refer to the DAC Default System Options document for information about the **Use Price Change Notify For Price Change On Invoice?** field of the SYS031 default system option.

```
     User: JEANNINE               Menu: CUSPCV1                Date:   3/27/13

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

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

1. Select option 5 (Price Change Notification) from the Special Customer Reports screen. The Print Price Change Notice screen appears.

```
DCNIPVR     ENTER    CDR Customer Conference              3/27/13 13:24:47
                        Print Price Change Notice



Customer Number . . . . . . . .   _____   (To print for a single customer)

Customer Corporate Number . . .   _____   (To print for a single Corporate)

Print All Customer Notices  . .   _ (Y/N)

Restrict To Warehouse:  . . . .   _____








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

2. To print a price change notification for a single customer, enter the customer number for the **Customer Number** (6,n) field, or press <F4> to select a number from the Select Customer Master screen.

   The report cannot be reprinted for a single customer after printing notifications for all customers (see the **Print All Customer Notices** field below).

3. To print price change notifications for a corporate customer, leave the **Customer Number** field blank, and enter a customer corporate number for the **Customer Corporate Number** (6,n) field. If necessary, press <F4> to select customer corporate numbers from the Select Corporate Master screen.

   The reports cannot be reprinted for a corporate customer after printing notifications for all customers (see the **Print All Customer Notices** field below).

4. To print price change notifications for all customers, leave the **Customer Number** and **Customer Corporate Number** fields blank, and enter *Y* (yes) for the **Print All Customer Notices** (1,a) field.

Price change notifications cannot be reprinted after they are printed for all customers.

5. To restrict the price change notifications printed to the items of a specific warehouse, enter a warehouse code for the **Restrict To Warehouse** (6,a) field.

6. Press <F6> (Print) and press <Enter> to confirm. The Special Customer Reports screen appears.

Price Change Notifications

```
CDR Customer Conference          Notify of Price Changes          JEANNINE   DSSQPFR    4/03/13 11:23:38 Page      1

Salesman 20      JOE BADEAUX

Customer Customer Name
Number
380110   MISS STOP N GO #110                 Prices are being held for     days after applied date.
         PO BOX 779
         BRANCH                  MS 39001
   Item     Description                Qty   UPC Code        Price      Price                  Retail   Retail  Date
   Number                              Mult.                 Before     After                  Before   After   Applied
   200022   COPENHAGEN FINE CUT          5                   16.880     16.590          |       3.24     2.99    4/03/13
   200030   COPENHAGEN LONG CUT          5   073100014613    16.880     16.590          |       3.24     2.99    4/03/13
   200014   SKOAL BERRY LONG CUT         5                   16.880     16.590          |       3.24     2.99    4/03/13
```

```
CDR Customer Conference          Notify of Price Changes          JEANNINE   DSSQPFR    4/03/13 11:23:38 Page      2

Salesman 20      JOE BADEAUX

Customer Customer Name
Number
380120   MISS STOP N GO #120                 Prices are being held for     days after applied date.
         3500 EAST SIDE BLVD
         JACKSON                 MS 30091
   Item     Description                Qty   UPC Code        Price      Price                  Retail   Retail  Date
   Number                              Mult.                 Before     After                  Before   After   Applied
   200022   COPENHAGEN FINE CUT          5                   16.880     16.590          |       3.24     2.99    4/03/13
   200030   COPENHAGEN LONG CUT          5   073100014613    16.880     16.590          |       3.24     2.99    4/03/13
   200014   SKOAL BERRY LONG CUT         5                   16.880     16.590          |       3.24     2.99    4/03/13
```

```
CDR Customer Conference          Notify of Price Changes          JEANNINE   DSSQPFR    4/03/13 11:23:38 Page      3

Salesman 20      JOE BADEAUX

Customer Customer Name
Number
380130   MISS STOP N GO #130                 Prices are being held for     days after applied date.
         2009 FOURTH ST
         NORTH BRANCH            MS 39004
   Item     Description                Qty   UPC Code        Price      Price                  Retail   Retail  Date
   Number                              Mult.                 Before     After                  Before   After   Applied
   200022   COPENHAGEN FINE CUT          5                   16.880     16.590          |       3.24     2.99    4/03/13
   200030   COPENHAGEN LONG CUT          5   073100014613    16.880     16.590          |       3.24     2.99    4/03/13
   200014   SKOAL BERRY LONG CUT         5                   16.880     16.590          |       3.24     2.99    4/03/13


** END OF REPORT **
```

Printing An Invalid Route Codes List

This option prints a list of customer records that have invalid call route or delivery route numbers.

```
User: JEANNINE              Menu: CUSPCV1              Date:  2/12/10

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

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

1. Select option 6 (Print Customers With Invalid Codes) from the Special Customer Reports screen.

Check Customers Codes

```
      Creative Data Research          Check Customer Codes          KAREN      BSRGPFR    12/06/93 14:49:04 Page      1

Cust.          Customer Name
Number

     8 LUCKY 13
Call    Call    Call    Call    Call    Call    Call    Delivery Delivery Delivery Delivery Delivery Delivery Delivery
Route 1 Route 2 Route 3 Route 4 Route 5 Route 6 Route 7 Route 1  Route 2  Route 3  Route 4  Route 5  Route 6  Route 7

    26 TEST CUSTOMER            _____  _____        Invalid corp #
    34 TEST CUSTOMER 2                                Invalid corp #
30100 A.J.'S BEACON
Call    Call    Call    Call    Call    Call    Call    Delivery Delivery Delivery Delivery Delivery Delivery Delivery
Route 1 Route 2 Route 3 Route 4 Route 5 Route 6 Route 7 Route 1  Route 2  Route 3  Route 4  Route 5  Route 6  Route 7
_____
30750 COUNTRY CORNER MARKET
Call    Call    Call    Call    Call    Call    Call    Delivery Delivery Delivery Delivery Delivery Delivery Delivery
Route 1 Route 2 Route 3 Route 4 Route 5 Route 6 Route 7 Route 1  Route 2  Route 3  Route 4  Route 5  Route 6  Route 7
                                                        _____   _____   _____
31099 DAILYS MARKET
Call    Call    Call    Call    Call    Call    Call    Delivery Delivery Delivery Delivery Delivery Delivery Delivery
Route 1 Route 2 Route 3 Route 4 Route 5 Route 6 Route 7 Route 1  Route 2  Route 3  Route 4  Route 5  Route 6  Route 7
                                                        _____   _____
31500 HARVEST MOON MARKET
Call    Call    Call    Call    Call    Call    Call    Delivery Delivery Delivery Delivery Delivery Delivery Delivery
Route 1 Route 2 Route 3 Route 4 Route 5 Route 6 Route 7 Route 1  Route 2  Route 3  Route 4  Route 5  Route 6  Route 7
                                                        _____   _____   _____   _____
31501 HARVEST MOON GRN VALLEY
Call    Call    Call    Call    Call    Call    Call    Delivery Delivery Delivery Delivery Delivery Delivery Delivery
Route 1 Route 2 Route 3 Route 4 Route 5 Route 6 Route 7 Route 1  Route 2  Route 3  Route 4  Route 5  Route 6  Route 7
                                                        _____            _____
31800 41ST AVE LIQUOR
Call    Call    Call    Call    Call    Call    Call    Delivery Delivery Delivery Delivery Delivery Delivery Delivery
Route 1 Route 2 Route 3 Route 4 Route 5 Route 6 Route 7 Route 1  Route 2  Route 3  Route 4  Route 5  Route 6  Route 7
_____                                                  _____   _____   _____
32150 HECKER PASS MARKET
Call    Call    Call    Call    Call    Call    Call    Delivery Delivery Delivery Delivery Delivery Delivery Delivery
Route 1 Route 2 Route 3 Route 4 Route 5 Route 6 Route 7 Route 1  Route 2  Route 3  Route 4  Route 5  Route 6  Route 7
        _____   _____                                 _____   _____   _____   _____
```

Printing An Office Staff Price List

Price lists may be printed for Billing Matrices by creating customer records and assigning a Billing Matrix code to each. To print taxing information, assign tax jurisdiction codes to customer records.

Lists can only be printed for 6 matrices at a time.

```
User: JEANNINE              Menu: CUSPCV1              Date:  2/12/10

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

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

1. Select option 7 (Office Staff Price List) from the Special Customer Reports menu.

```
GSDOPVR     ENTER           Creative Data Research        5/03/94 14:37:33
                            Office Staff List Prompt

Type choices, press Enter.

 You must enter a customer number that represents the pricing structures
 you want printed on the list.  Only the first number is required.  All others
 can be left blank and no price will be printed for those structures.


           Pricing   Pricing   Pricing   Pricing   Pricing   Pricing
           Matrix 1  Matrix 2  Matrix 3  Matrix 4  Matrix 5  Matrix 6
           800001    800002    800003    800004    800005    800006


Beginning Product Heading 1

Ending Product Heading    100

Submit to JOBQ BOOK


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

2. Input up to 6 matrices, or press F4 to search for records.
3. Input a beginning and ending product heading number.
4. Change default JOBQ, if applicable.
5. Press <F6> to print list.

Office Staff Price List

==

For Heading 0001 - 0015   Price List For ----> 800001 800002

Item #	Item Description	Retail	PacK	U/M	Packed	Base Cost	Price Matrix	Price Matrix	Price Matrix	Price Matrix	Price Matrix	Price Matrix

Product Heading 0001 King / Regular

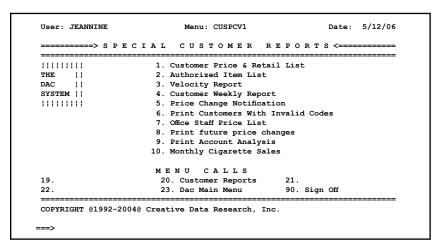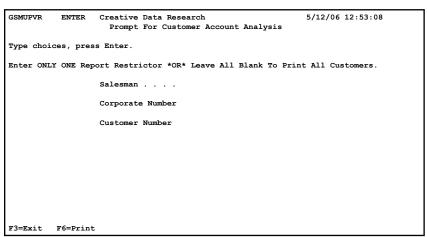| Item #	Item Description	Retail	PacK	U/M	Packed	Base Cost	Price Matrix	Price Matrix	Price Matrix	Price Matrix	Price Matrix	Price Matrix
005650	BARCLAY BOX 85 MMXXXXXXXXXXXXXXXXXXXX	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
010080	BARCLAY 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
126710	BELAIR FILTER KING	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
070806	CAMEL *WIDE* LIGHT 83 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
111503	CAMEL B2G1F DISPLAY	02000	PK	DSP	40	69.56	68.35	73.70	.00	.00	.00	.00
100700	CAMEL FILTER BOX	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
111522	CAMEL FILTER BOX B2G1F	02000	PKS	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
010306	CAMEL FILTER HARD PACK 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
999508	CAMEL LIGHT BOX	02000	PK	CTN	10	16.14	15.93	12.62	.00	.00	.00	.00
111523	CAMEL LIGHT BOX B2G1F	02000	PKS	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
002100	CAMEL LIGHT HARD PACK 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
101000	CAMEL LIGHTS	32.00	OZ	CTN	10	21.86	20.59	19.15	.00	.00	.00	.00
001160	CAMEL LITE 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
066606	CAMEL SPECIAL LIGHT BOX 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
066506	CAMEL SPECIAL LIGHT SOFT 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
021412	CAMEL ULTRA LIGHT 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
992319	CAMEL ULTRA LT	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
992318	CAMEL ULTRA LT BX	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999998	CARLTON	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
101400	CARLTON BOX	32.00	OZ	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
029010	CARLTON BOX 85	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
999910	CARLTON MENTHOL	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
005720	CARLTON MENTHOL 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
004390	CHESTERFIELD *SHORT* NF 70 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
011236	CHESTERFIELD FULL FLAVOR 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
010370	CIGARETTES PREMIUM 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
004420	COMMANDER *SHORT* NON-FILT 70	0.00		CTN	1	12.84	12.63	13.21	.00	.00	.00	.00
001140	COMMANDER KING NON-FILTER 85	0.00B		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
007515	HERBERT TAREYTON NON-FILT 85MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
102400	KENT BOX KING	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999911	KENT FILTERS	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
102100	KENT GOLDEN LIGHTS	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
001210	KENT GOLDEN LIGHTS MEN 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
001200	KENT GOLDEN LIGHTS 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
992229	KENT GOLDEN LT BOX KING	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
102300	KENT III ULTRA LIGHT KINGS	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
111584	KENT KINGS B1G1F	02000	PK	CTN	10	13.18	13.04	9.22	.00	.00	.00	.00
002500	KENT 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
999912	KOOL BOX	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
102700	KOOL FILTER	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999916	KOOL LIGHTS	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
102900	KOOL MILD BOX	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
002126	KOOL MILD BOX 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
005600	KOOL MILD 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
103000	KOOL MILDS	16.00	OZ	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
004380	KOOL REG NON-FILTER SHORT 70MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
104500	KOOL ULTRA KING	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999493	L & C CLASSIC DARK 5/4 PACK	00400	PK	CTN	10	11.76	11.70	7.60	.00	.00	.00	.00
103300	L & M FILTER	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
999917	LARK FILTER	02000	PK	CTN	10	21.22	20.97	18.42	.00	.00	.00	.00
014142	LARK FULL FLAVOR 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00
003460	LARK LIGHT 85 MM	0.00		CTN	1	11.01	10.80	11.99	.00	.00	.00	.00

Printing A Customer Account Analysis Report

The Customer Account Analysis report details the current account of an individual customer, of a corporate customer, of all the customers of a designated sales representative, or of all the distributor's customers.

```
    User: JEANNINE              Menu: CUSPCV1              Date:  5/12/06

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

                       M E N U   C A L L S
    19.                   20. Customer Reports       21.
    22.                   23. Dac Main Menu           90. Sign Off
    ======================================================================
    COPYRIGHT @1992-2004@ Creative Data Research, Inc.

    ===>
```

1. Select option 9 (Print Account Analysis) from the Special Customer Reports screen. The Prompt For Customer Account Analysis screen appears.

```
GSMUPVR     ENTER    Creative Data Research            5/12/06 12:53:08
                     Prompt For Customer Account Analysis

Type choices, press Enter.

Enter ONLY ONE Report Restrictor *OR* Leave All Blank To Print All Customers.

                    Salesman . . . .

                    Corporate Number

                    Customer Number












F3=Exit    F6=Print
```

2. To print an account analysis report for the customer accounts of a particular sales representative, enter the employee code of the sales representative assigned to the customer accounts for the **Salesman** (6,a) field.
3. To print an account analysis report for a corporate customer, enter the desired corporate number for the **Corporate Number** (6,n) field.
4. To print an account analysis report for an individual customer, enter the desired customer number for the **Customer Number** (6,n) field.
5. To print account analysis reports for all the customers, leave every field of the Prompt For Customer Account Analysis screen blank.
6. Press <Enter> when data entry is complete.
7. Press <F6> (Print). The Special Customer Reports screen appears.

Customer Account Analysis

```
Creative Data Research-SUPPORT        Customer Account Analysis         JTIPPIN    GSMTPFR    8/18/99 11:22:16 Page    1

Salesman No: 26

  Customer No. 100407 DANIEL'S GROCERY                 Terms Days   7      ***  A C C O U N T   A N A L Y S I S  ***
  Terms Code    2    NET 7 DAYS                         Days Past Terms          Period To Date       Year To Date

  Charges This Month :     897.64    Current Due      897.64    0 -   7   Sales :        897.64         44255.11
  Credits This Month :        .00    Age Period 1        .00    8 -  14   Cost  :        914.37         41789.74
  Adj. This Month  . :        .00    Age Period 2     35.39-   15 -  30   Profit          16.73CR        2465.37
  Net Last Month . . :    _____    Age Period 3        .00   31 -  45   Profit %  . :    1.86-            5.57
  Amount Due  . . :       4088.26    Age Period 4    3226.01   46 - 999   # Of Orders  :       2               90

  Late Charge PTD     0.00  Late Charge YTD      0.00 Last Late Chg            Last Pay Date  5/25/98   Last Order Date  8/17/99
  _____

** END OF REPORT **
```

Printing A Monthly Cigarette Sales Report

The Monthly Cigarette Sales report lists the total cartons sold and total sales amount for each customer in a designated month. This report is based on Accounts Receivable data, and limited to how long AR data is retained in history.

```
    User: JEANNINE              Menu: CUSPCV1            Date:  2/22/08

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

                          M E N U   C A L L S
    19.                20. Customer Reports      21.
    22.                23. Dac Main Menu         90. Sign Off
    ========================================================================
    COPYRIGHT @1992-2004@ Creative Data Research, Inc.

    ==>
```

1. Select option 10 (Monthly Cigarette Sales) from the Special Customer Reports screen. The Monthly Cigarette Sales Report screen appears.

```
GSOXPVR    ENTER    Creative Data Research, Inc.            2/22/08 16:30:19
                       Monthly Cigarette Sales Report

Type choices, press Enter.


Enter The Month For Which The Cigarette Sales Report Is Needed:
 Enter The Year For Which The Cigarette Sales Report Is Needed:  8











F3=Exit    F6=Print
```

2. Enter the number of the desired month for the **Enter The Month For Which The Cigarette Sales Report Is Needed** (2,n) field.

3. Enter the number of the desired year for the **Enter The Year For Which The Cigarette Sales Report Is Needed** (2,n) field.

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

Monthly Cigarette Sales

```
Creative Data Research, Inc.          Monthly Cigarette Sales          JEANNINE   GSBLPFR   2/22/08 12:46:37 Page     1

Cust #     Customer Name                    Ctns.        Sales

 99000    99 MART PLUS                        18          785.34

100001    STOP 'N SHOP                       150         4397.20

100003    BOB'S SHELL                         80         2349.10

100222    TODD'S COUNTRY CORNER              150         4397.20

100301    THREE RIVERS CHEVRON                 4           94.83

100801    BARON EXPRESS #2 BP                150         4397.20

100802    CRANKY CORNER QUICK STOP           110         3442.40

100850    EXPRESS WAY FOOD MART              110         3437.40

100857    JR FOOD MART - FOLSOM              150         4397.20

320055    OCEAN SPRINGS QUICK STOP            13          364.48

320091    LIL SHORT STOP - VANCLEVE          150         4125.70

320092    LIL SHORT STOP - OCEAN SPRINGS      90         2536.20

500101    UNION GROVE GROCERY                100         2785.60

700180    L & M GROCERY                       80         2327.30

770001    TEXAS TRUCK STOP                    70         2422.80

770005    PARK IT MARKET                      30         1026.50

770031    TAYLOR'S MINI MART                 120         4767.05

770060    PACKS FOOD STORE                    13          524.23

800237    DANNY & CLYDE'S FOOD STORE #20     130         3745.80

Final Totals For The Month Of    DECEMBER   1718        52323.53

** END OF REPORT **
```

Appendix A: Customer Price Book Data File Definition

Refer to Printing A Customer Price Book for information about creating a data file with the following:

Field Name	Start	End	Length	Data Type	Comments
Customer Number	1	6	6.0	Numeric	Customer That Price Book Is For
Item Number	7	12	6.0	Numeric	Item Number
Sales Class	13	17	5.0	Numeric	Sales Class This Item Belongs To
Product Heading	18	21	4	Alpha Numeric	Product Heading This Item Belongs To
Item Description	22	56	35	Alpha Numeric	Description Of The Item
UPC Number	57	71	15	Alpha Numeric	UPC Of Selected U/M
U/M	72	74	3	Alpha Numeric	Selected U/M (Example: CTN)
MOQ	75	79	5.0	Numeric	Minimum Order Quantity
Packed	80	88	9	Alpha Numeric	How The U/M Is Packed (Example: 10 PKS)
Retail Pack	89	98	10	Alpha Numeric	How The Retail Unit Is Packed (Example: 20 CIGS)
Case Pack	99	103	5.0	Numeric	How Many Are In A Case (Example: 60)
Weight	104	110	7.2	Numeric	Weight Of Selected U/M
Unit Price	111	119	9.2	Numeric	Customer's Unit Price For Selected U/M
Retail Price	120	126	7.2	Numeric	Customer's Retail
Profit %	127	131	5.2	Numeric	Profit %
UPC Unit 1	132	146	15	Alpha Numeric	UPC For U/M 1
UPC Unit 2	147	161	15	Alpha Numeric	UPC For U/M 2
UPC Unit 3	162	176	15	Alpha Numeric	UPC For U/M 3
UPC Unit 4	177	191	15	Alpha Numeric	UPC For U/M 4
Each Price	192	198	7.2	Numeric	Customer's Price for Each Unit
Stamp Tax 1	199	203	5.2	Numeric	Applicable Stamp Tax 1
Stamp Tax 2	204	208	5.2	Numeric	Applicable Stamp Tax 2
Stamp Tax 3	209	213	5.2	Numeric	Applicable Stamp Tax 3
Stamp Tax 4	214	218	5.2	Numeric	Applicable Stamp Tax 4
Stamp Tax 5	219	223	5.2	Numeric	Applicable Stamp Tax 5
Allowance Amount	224	228	5.2	Numeric	Allowance If Applicable
Category Number	229	230	2.0	Numeric	Item Category Number