

MEMO SYSTEM

THE "MEMO SYSTEM" IS A SERIES OF PROGRAMS DESIGNED TO FACILITATE TRANSFER OF MESSAGES FROM THE CUSTOMER TO THE DELIVERY PERSON AND KEEP A RECORD OF SUCH MESSAGES FOR FOLLOW UP BY MANAGERS.

F.1 ENTER ACCOUNT MEMO

THE "ENTER ACCOUNT MEMO" SCREENS ALLOW THE CUSTOMER SERVICE REPRESENTATIVE TO SEND MESSAGES TO THE ROUTE SALES DEPARTMENT ABOUT CUSTOMERS' ACCOUNTS. THE MESSAGES CAN BE PRINTED IMMEDIATELY OR SAVED FOR LATER RETRIEVAL AND PRINTING.

THE MEMO SERVICE MESSAGE ENTRY CAN ALSO BE ACCESSED AT THE "TELSEL ORDER ENTRY SCREEN" BY HOLDING DOWN {CTRL} AND PRESSING {I}.

AN ACCOUNT NUMBER IS NEEDED TO ENTER A MEMO SERVICE MESSAGE. AN ALPHA SEARCH ALLOWS YOU TO FIND THE ACCOUNT NUMBER IF THE CUSTOMER DOES NOT HAVE IT AVAILABLE.

THE "MEMO SERVICE ACCOUNT NUMBER SCREEN" ALLOWS YOU TO ENTER A CUSTOMER # OR TO LOOK UP THE CUSTOMER NUMBER THROUGH "NAME SEARCH" SELECTION OF {PF4} ALPHA LOOK UP DISPLAYS A "NAME SEARCH SCREEN" WHICH ALLOWS YOU TO SEARCH FOR THE CUSTOMERS' ACCOUNT WITH PART OR ALL OF THE ACCOUNT NAME.

ENTRY OF FULL OR PARTIAL ACCOUNT NAME RETRIEVES ACCOUNTS CLOSEST TO THE ENTERED NAME. THE ACCOUNT WITH THE CLOSEST MATCH TO THEN INFORMATION ENTERED IS IN THE MIDDLE OF THE SCREEN OF NAMES RETRIEVED. USE THE ARROW KEYS TO HIGHLIGHT THE NAME DESIRED AND PRESS {PF1}.

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SCREEN FIELDS      DESCRIPTION  
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1ST COLUMN        CUSTOMER ACCOUNT NUMBER  
  
2ND COLUMN        CUSTOMER NAME  
  
3RD COLUMN        1ST LINE OF CUSTOMER ADDRESS  
  
4TH COLUMN        11 CHARACTERS OF CITY, STATE, ZIP FIELD
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USE THE UP/DOWN ARROW KEYS TO POSITION THE INVERSE VIDEO LINE OVER THE DESIRED CUSTOMER LINE AND PRESS {PF1}. THE "MEMO SERVICE MESSAGE SCREEN" APPEARS.

MEMO SERVICE MESSAGE SCREEN

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SCREEN FIELDS      DESCRIPTION
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CUSTOMER #        NUMBER OF CUSTOMER SELECTED FOR ENTRY OF MESSAGE

DATE              SYSTEM DATE.

TIME              SYSTEM TIME

NAME & ADDRESS    CUSTOMERS NAME AND ADDRESS

A/R BALANCE      CUSTOMERS ACCOUNT RECEIVABLE BALANCE AT TIME OF
RETRIEVAL.

LAST PURCHASE    DATE OF LAST INVOICE ENTERED IN SYSTEM

LAST PAYMENT     DATE OF LAST PAYMENT ENTERED IN SYSTEM

CONTACT          NAME OF CONTACT PERSON IF INFORMATION ENTERED

RETURN           NEXT TIME CUSTOMER IS SCHEDULED FOR DELIVERY

PH               PHONE NUMBER

CL               CREDIT LIMIT

ROUTE#           NUMBER OF ROUTE CUSTOMER IS ON

SM               NUMBER OF SALESMAN SERVICING THE CUSTOMER

AGING            CUSTOMERS' BALANCE  SPLIT OUT BY DATE OF INVOICES
OUTSTANDING

OPTIONS          (R)EVIEW - REVIEW EXISTING MEMOS ON CUSTOMERS ACCOUNT
                (A)DD NEW MEMO - ADD NEW MEMO TO CUSTOMERS ACCOUNT
                (C)HANGE ACCT - CHANGE ACCOUNT NUMBER FROM ONE SHOWN
                (E)XIT - LEAVE MEMO SERVICE MESSAGE WITHOUT CREATING MEMO

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CHOOSING TO (A)DD NEW MEMO BRINGS UP THE "MESSAGE TYPE WINDOW"

NOTE: THESE FIELDS CAN BE EDITED AND ADDED TO IN THE "MEMO SYSTEM" EXTENSION PROGRAM.

OPTIONS (CHOOSE MESSAGE TYPE) ENTER NUMBER OF MESSAGE TYPE THAT FITS MEMO TO BE ENTERED

(M)ORE - LOOK FOR MORE "MESSAGE TYPES"
(E)XIT - LEAVE MEMO SERVICE MESSAGE WITHOUT CREATING MEMO

SELECTION OF A MESSAGE TYPE RETRIEVES A MESSAGE ENTRY SCREEN WITH 13 LINES AVAILABLE FOR INPUT.

PF1 ALLOWS YOU TO DELETE INPUT ONE LINE AT A TIME. {PF3} PRESSED AT THE END OF A LINE OF TEXT ENTERED CENTERS THE LINE.

WHEN YOU ARE FINISHED ENTERING THE MESSAGE PRESS {PF2} TO SAVE AND EXIT THE SCREEN.

PRESS {S} TO SAVE THE MESSAGE. THE MESSAGE CAN BE RETRIEVED LATER THROUGH THE "VIEW/PRINT MEMOS" PROGRAM. (SECTION F.4)

PRESS {E} TO EXIT THE MEMO WITHOUT SAVING.

PRESS {P} TO PRINT AND SAVE THE MESSAGE. SELECT THIS OPTION ONLY FOR URGENT MESSAGES. THE MESSAGE PRINTS IMMEDIATELY TO THE DEFAULT DESTINATION PRINTER FOR MEMO SERVICE MESSAGES LOCATED BY THE DISPATCHER.

F.2 STATISTICS MENU

THIS PROGRAM PRINTS A SUMMARY LISTING BY MESSAGE TYPE OF ALL CALLS ENTERED INTO THE SYSTEM FOR THE DAY, PERIOD, OR YEAR TO DATE.

1 TODAYS SUMMARY PRESS {1} THEN {ENTER} IF YOU WISH TO PRINT A REPORT FOR THE CURRENT DAYS ACTIVITY. A CSR OR ROUTING SUPERVISOR MIGHT REQUEST THIS REPORT AT THE END OF THE DAY FOR MANAGEMENT REPORTING.

NOTE: THE DAY AUTOMATICALLY CLOSES AT MIDNIGHT AND CALL STATISTICS ARE AUTOMATICALLY REMOVED.

2 PERIODIC SUMMARY PRESS {2} THEN {ENTER} TO PRINT A REPORT SHOWING DAILY AND PERIOD SUMMARY STATISTICS.

NOTE: FUTURE PROGRAMMING ENHANCEMENTS WILL RESET AND CLOSE THE PERIOD AUTOMATICALLY WHEN THE "CLOSE RECEIVABLES" PROGRAM IS RUN.

3 YEAR TO DATE SUMMARY PRESS {3} THEN {ENTER} TO PRINT A REPORT SHOWING DAILY, PERIODIC, AND YEAR TO DATE SUMMARY STATISTICS.

4 EXIT

F.3 PRINT MEMO

THE "PRINT MEMOS" PROGRAM IS DESIGNED TO ALLOW MANAGERS OR DISPATCHERS TO VIEW OR PRINT MESSAGES ENTERED INTO THE MEMO SYSTEM.

SCREEN OPTIONS DESCRIPTION

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1  CONDENSED /   DEFAULT IS "DETAILED".  IF YOU DO NOT WISH THE
   DETAILED     DETAIL(MESSAGE ENTERED) TO PRINT ON THIS REPORT, PRESS
               {1} THEN {ENTER}.  THE DISPLAY CHANGES TO "CONDENSED".

2  MEMO TYPE    DEFAULT IS "ALL".  TO SELECT ONLY MESSAGES FOR A SINGLE
               MEMO TYPE, PRESS {2} THEN {ENTER}.  TYPE IN THE NUMBER OF
               THE MEMO TYPE AND PRESS {ENTER}.

3  DATE        DEFAULT IS SYSTEM DATE.  TO SELECT A RANGE OF DATES,
               PRESS {3} THEN {ENTER}.  TYPE IN THE BEGINNING DATE AND
               PRESS {ENTER}.  TYPE IN THE ENDING DATE AND PRESS
               {ENTER}.

4  OPERATOR    DEFAULT IS "ALL".  TO SELECT ONLY MESSAGES ENTERED BY A
               SINGLE OPERATOR TO PRINT, PRESS {4} THEN {ENTER}.  TYPE IN
               THE OPERATORS LOGIN NAME (LOWERCASE) AND PRESS {ENTER}.

5  ACCOUNT     DEFAULT IS "ALL".  TO SELECT ONLY MESSAGES FOR A SINGLE
               ACCOUNT OR A RANGE OF ACCOUNTS TO PRINT, PRESS {5} THEN
               {ENTER}.  TYPE IN THE BEGINNING ACCOUNT NUMBER AND PRESS
               {ENTER}.  TYPE IN THE ENDING ACCOUNT NUMBER AND PRESS
               {ENTER}.  IF YOU WANT THE REPORT TO PRINT FOR A SINGLE
               ACCOUNT THE BEGINNING AND ENDING ACCOUNT NO. THE SAME.

6  COMPANY    DEFAULT IS "ALL".  TO SELECT A SINGLE COMPANY, PRESS {6}
               THEN {ENTER}.  TYPE IN THE COMPANY NUMBER AND PRESS
               {ENTER}.

7  SALESMAN   DEFAULT IS "ALL".  TO SELECT A SINGLE SALESMAN OR A RANGE
               OF SALESMAN, PRESS {7} THEN {ENTER}.  TYPE IN THE
               BEGINNING SALESMAN NUMBER AND PRESS {ENTER}.  TYPE IN THE
               ENDING SALESMAN NUMBER AND PRESS {ENTER}.

A  INCLUDE REPRINTS  DEFAULT IS "NO".  TO INCLUDE REPRINTS(PRINT MESSAGES THAT
               HAVE ALREADY BEEN PRINTED ONCE) PRESS {A} THEN {ENTER}.
               THE DISPLAY CHANGES TO "YES".

B  UPDATE ?      DEFAULT IS "NO".  TO UPDATE(TELL THE SYSTEM THAT THE
               MESSAGES HAVE BEEN PRINTED) PRESS {B} THEN {ENTER}.  THE
               DISPLAY CHANGES TO "YES".  THE DISPATCHER PRINTS "MEMO
               SERVICE MESSAGES PERIODICALLY THROUGHOUT THE DAY.
               ANSWERING "YES" TO THIS OPTION PREVENTS PREVIOUSLY
               DISPATCHED MESSAGES FROM PRINTING EVERY TIME THE REPORT
               IS REQUESTED.

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ONCE THE REPORT FINISHES PROCESSING THE "REPORT SELECTIONS MENU" APPEARS.

F.4 PURGE MEMOS

THE "PURGE MEMOS" PROGRAM PURGES SELECTED MEMOS FROM THE SYSTEM.

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SCREEN OPTIONS  DESCRIPTION

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1  TYPE                DEFAULT IS "ALL".  TO SELECT ONLY MESSAGES FOR A SINGLE
                        MEMO TYPE, PRESS {1} THEN {ENTER}.  TYPE IN THE NUMBER OF
                        THE MEMO TYPE AND PRESS {ENTER}.

2  PURGE DATE          DEFAULT IS "ALL".  TO SELECT A RANGE OF DATES, PRESS {2}
                        THEN {ENTER}.  TYPE IN THE BEGINNING DATE AND PRESS
                        {ENTER}.  TYPE IN THE ENDING DATE AND PRESS {ENTER}.

4  OPERATOR            DEFAULT IS "ALL".  TO SELECT ONLY MESSAGES ENTERED BY A
                        SINGLE OPERATOR, PRESS {3} THEN {ENTER}.  TYPE IN THE
                        OPERATORS LOGIN NAME (TYPE IN LOWER CASE) AND PRESS
                        {ENTER}.

5  ACCOUNT             DEFAULT IS "ALL".  TO SELECT ONLY MESSAGES FOR A SINGLE
                        ACCOUNT OR A RANGE OF ACCOUNTS, PRESS {4} THEN {ENTER}.
                        TYPE IN THE BEGINNING ACCOUNT NUMBER AND PRESS {ENTER}.
                        TYPE IN THE ENDING ACCOUNT NUMBER AND PRESS {ENTER}.  IF
                        YOU WANT TO PURGE MESSAGES FOR A SINGLE ACCOUNT THE
                        BEGINNING AND ENDING ACCOUNT NUMBER MUST BE THE SAME.

5  ROUTE              DEFAULT IS "ALL".  TO SELECT ONLY MESSAGES FOR A SINGLE
                        ROUTE OR A RANGE OF ROUTES, PRESS {5} THEN {ENTER}.  TYPE
                        IN THE BEGINNING ROUTE NUMBER AND PRESS {ENTER}.  TYPE IN
                        THE ENDING ROUTE NUMBER AND PRESS {ENTER}.  IF YOU WANT
                        TO PURGE A SINGLE ROUTE THE BEGINNING AND ENDING ROUTE
                        NUMBER MUST BE THE SAME.

6  ACCOUNT NUMBER     DEFAULT IS "ALL".  TO SELECT A SINGLE ACCOUNT OR A RANGE
    RANGE              OF ACCOUNTS, PRESS {6} THEN {ENTER}.  TYPE IN THE
                        BEGINNING ACCOUNT NUMBER AND PRESS {ENTER}.  TYPE IN THE
                        ENDING ACCOUNT NUMBER AND PRESS {ENTER}.  IF YOU WANT TO
                        PURGE A SINGLE ACCOUNT THE BEGINNING AND ENDING ACCOUNT
                        NUMBER MUST BE THE SAME.
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F.5 EXTENSION MENU

THIS MENU CONTAINS VARIOUS OPTIONS THAT FUNCTION AS MENU SELECTIONS FOR DEFINING INFORMATION USED BY THE MEMO SYSTEM.

PRESS {5} TO EXIT THE MEMO MASTER SETUP.

F.7.1 DEFINE QUICK CODES

QUICK CODES ONCE DEFINED AS A LETTER OR NUMBER ALLOW AN OPERATOR TO PUT IN A WORD, A LINE, OR SEVERAL LINES OF INFORMATION IN "MEMO SERVICE MESSAGES" BY PRESSING THE @ SIGN AND THE LETTER OR NUMBER.

TYPE IN A NUMBER(0-9) OR A LETTER (A-Z) THAT IS TO BE USED AS THE QUICK CODE AND PRESS {ENTER}. A BOX DISPLAYS. TYPE IN A WORD, A LINE, OR LINES OF INFORMATION THAT YOU WANT TO WRITE EACH TIME THE QUICK CODE IS USED. PRESS {PF2} WHEN FINISHED. A WINDOW APPEARS IN THE MIDDLE OF THE BOX. PRESS {S}

TO SAVE THE QUICK CODE OR PRESS {E} TO EXIT THE QUICK CODE WITHOUT SAVING.
YOU MAY DEFINE ANOTHER QUICK CODE OR PRESS {PF2} TO EXIT.

NOTE: IF YOU TYPE IN A NUMBER OR LETTER THAT HAS ALREADY BEEN DEFINED, THE
PREVIOUS INFORMATION IS WIPED OUT.

F.7.2 VIEW/PRINT QUICK CODES

THIS PROGRAM ALLOWS YOU TO VIEW OR PRINT THE QUICK CODES THAT HAVE BEEN
DEFINED. WHEN YOU SELECT THIS PROGRAM A "REPORT SELECTIONS MENU" APPEARS.

F.7.3 ASSIGN MEMO PRINTER

ACCESSES PRINTER UTILITIES FOR THE MEMO SYSTEM MOST OF THE UTILITIES ARE THE
SAME AS FOUND IN THE "SYSTEM MENU" (9).

PRESS {7} TO EXIT THE MEMO PRINTER UTILITY PROGRAMS.

F.7.4 ADD/EDIT MEMO TYPES

THIS PROGRAM ALLOWS YOU TO ADD OR EDIT THE MEMO TYPES USED TO INPUT MEMO
SERVICE MESSAGES.

PRESS {1} THEN {ENTER} TO EDIT AN OLD MEMO TYPE. TYPE IN THE MEMO TYPE
NUMBER AND PRESS {ENTER}. THE OLD MEMO TYPE NUMBER AND DESCRIPTION
DISPLAYS.
TYPE IN THE NEW DESCRIPTION AND PRESS {ENTER}.

PRESS {2} THEN {ENTER} TO ADD A NEW MEMO TYPE. THE NEXT AVAILABLE MEMO TYPE
NUMBER DISPLAYS. TYPE IN THE DESCRIPTION AND PRESS {ENTER}.

PRESS {3} THEN {ENTER} TO DISPLAY ALL THE MEMO TYPES ALREADY DEFINED IN THE
SYSTEM. PRESS {PF2} TO EXIT WHEN FINISHED VIEWING.