



CoLinear Systems Inc.

Response Quick Start Guide



v10



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If you read nothing else...

Please read the next 6 pages!

There are a few things to learn before you can use *Response* effectively.

Skip this part and you'll likely be frustrated and miss those things that make it unique and such a pleasure to use.

Worse, you may come to think *Response* is not so powerful or user-friendly when, in fact, it's richer, faster and easier to use than competitive products! Familiarity is the key. Take just three minutes now to study these next few pages. You'll be glad you did!



CoLinear's Design Philosophy

Making a program easy-to-use for “new” users is very different from optimizing it for experienced ones. Experienced users already know how *Response* works and don't want or need to be distracted by superfluous information. By making as much as possible happen “behind the scenes,” experienced users can get the most done without unnecessary screen clutter or wasted effort. We expressly designed *Response* with this in mind.

We continually strive to optimize the link between the user and the application in order to complete the most work, in the shortest time, with the least amount of effort possible. For example, *Response* automatically releases backorders into credit card and fulfillment processing streams without *any* user intervention. [But, of course, you may assume manual control if and whenever you wish.]

Becoming familiar with *Response*, like anything else, entails a short learning curve. So it's important not to miss the opportunity to learn some tricks that make it uniquely efficient. Understanding what *Response* is doing and how to most efficiently interact with it is important since you might otherwise be doing something the hard way.

What may at first seem daunting, quickly becomes second nature. Please don't allow any initial frustration to throw you off track. You'll be a *Response* expert in no time at all!

If you have the time, please review the tutorials that follow. The more you learn about *Response* the more you'll be able to take advantage of everything it can do for you and your organization!



Hot Keys

Whenever you see a Button, Field, Tab, or Menu where the label has one letter underlined -- that letter is a “Hot Key” that will access that control.



In the first example holding down the **[Alt]** key and then pressing the N key will have the same effect as clicking the “Next” button. In the second example, pressing **[Alt]+L** will move the cursor directly to the Last Name field. (**[Alt]+L** is another way of saying ‘hold down the **[Alt]** key, then press the L key’).

Key Chart

For a print out of some of more commonly used Hot Keys Print download and print out our [Key Chart](#) to place at the top of your keyboard to assist you.

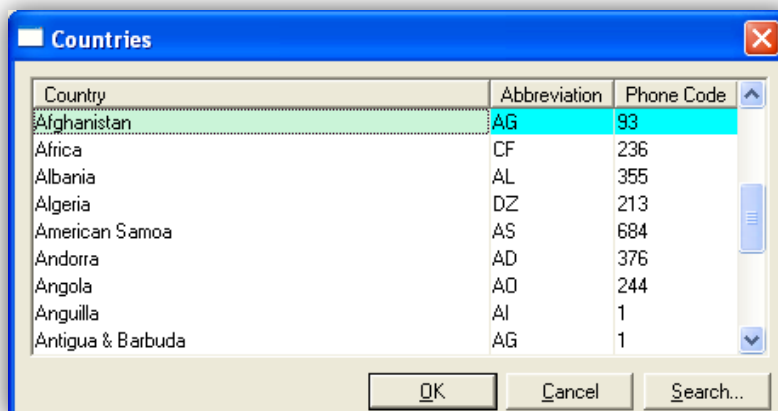
FIND Keys

Whenever you see a field that looks like this:  you may FIND a record there. The button to the right of the field is called the Prompt button.

Press **[F9]** with the cursor in one of these fields and a record will display to the screen, if one exists. You may also type some text to “seed” the search with that information before pressing **[F9]**.

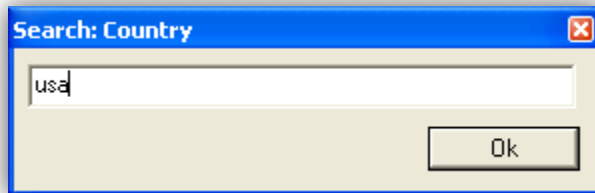
Pressing **[F8]** displays the NEXT record in sequence. Similarly, **[F7]** displays the PREVIOUS record in sequence.

You may also press the Prompt key **[F4]** in one of these fields to display a Selection List, which looks like this:





Please note that the first line of the Country column (Afghanistan) has a dotted box around it and is highlighted in green. This indicates that this is the active column. All Selection Lists automatically sort by the active column. If you change columns using the Tab key or the mouse, the Selection List will resort by that column automatically. The Search Dialog appears whenever you click the “Search” button, or you can just start typing and the Dialog box will automatically appear.



Click “OK” or press **Enter** to FIND the closest match to the text you typed.

It’s often faster and easier, however, to type your search criteria directly into the field (if you know what it is) and press one of the FIND keys to display the closest match.

These  fields are special because they are “indexed” and provide instant access to the database. By typing relevant data *before* pressing a FIND key, desired records can be located more quickly and easily.

For example, say the field is Zipcode: 

If you type “30062” and press **F9**, the program will display the first record in the database (if any) with zipcode 30062. If no record exists with the zipcode you typed, *the first record with a higher zipcode* will display instead. If no record qualifies, an appropriate message will display.

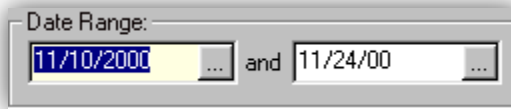
So, without using pull-down options or other wasteful clicks or keystrokes you can freely search the database by different criteria using the actual fields to do so. In customer service, for example, many of these indexed fields offer you faster, more convenient and more flexible look-ups than you’ll find in most other programs.

Turn to page 35 to take a quick “test-drive” of the look-up capabilities in *Response*.



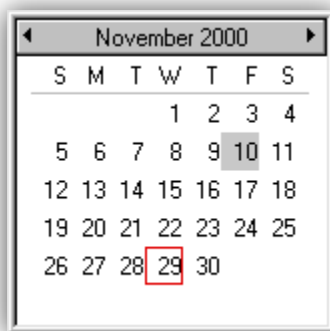
Date Fields

Date fields work a little differently from other types of fields in *Response*.



Press the letter “T” in the date field to display today’s date. You may also press the + or - keys to increment the date by one day.

Pressing the Prompt button **F4** in a date field pops up a calendar instead of a Selection List.



Use the Calendar to scroll through and display the desired date, if you’d prefer not to type in the date directly. **Ctrl**+**→** advances the month; **Ctrl**+**←** displays the previous month. Similarly, **Ctrl**+**↑** advances the year, and vice versa for **Ctrl**+**↓**.

Buttons and Focus

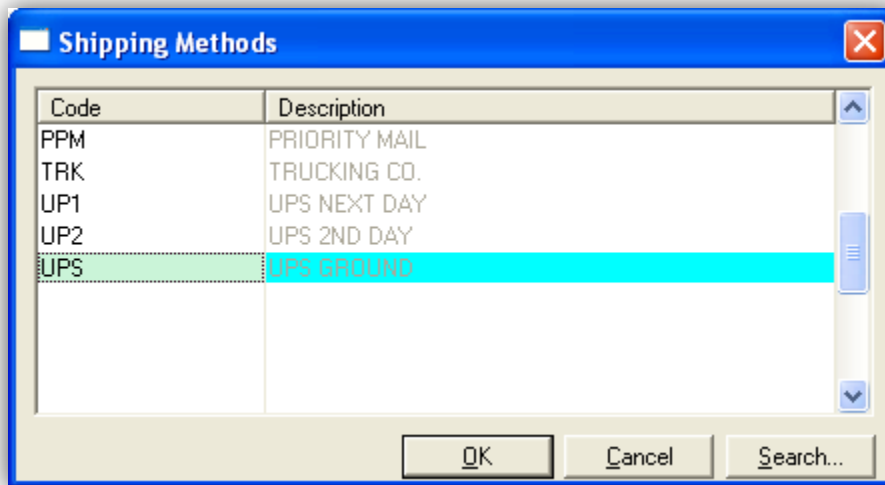
A button with a dotted box inside is said “to have the focus.”



Pressing **Enter** has the same effect as clicking the button. For quick and efficient data entry it’s important to keep track of where the focus lies, and to use the keyboard, rather than the mouse, to activate the behavior associated with it. It’s also worth noting that if a button has focus, you may use the more convenient **Spacebar** rather than **Enter**; but only if that button is also the current default.



Default and Non-Default Buttons



Note, in the Selection List above, that the “OK” button has a bold outline while the “Cancel” and “Search” buttons do not. This denotes that “OK” is the current default button. For any view where there is a default button, pressing **Enter** will have the same effect as clicking that button.



Secure LOGIN

Response requires that every user login in order to track and audit their actions. The pre-defined default login is:

Login: SUPERVISOR

Password: RESPONSE

Once you've logged in, you'll have supervisor privileges allowing you to add new login names to the system. Just remember that a valid account is required to log in. Unless you change the default login shown above, you can always get into the system this way.



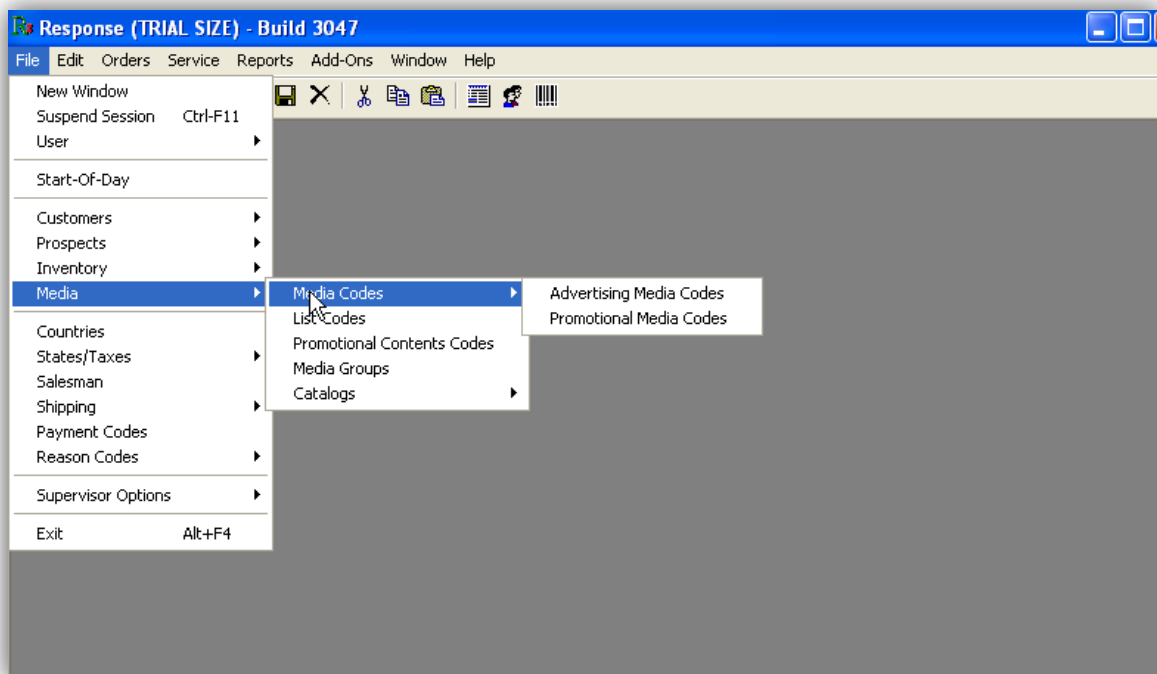
Using Response

Since you're not yet familiar with *Response*—it's a large application covering a lot of ground—we've included this short Tutorial to help you get started.

The data supplied is based on the TravelSmith, once one of our largest and most successful customers. You'll see that all of the inventory items from this catalog have been entered, as well as more than a thousand customers and orders. This way you'll be able to generate meaningful reports right away. Of course, enter your own data (or change what's already there) as you please.

Only a handful of the programs have been disabled (such as electronic credit card processing, rate shopping, and a few other modules which cannot function without live installation or additional third-party products).

Try out the various menus and options. Extensive on-line help is available to assist you.

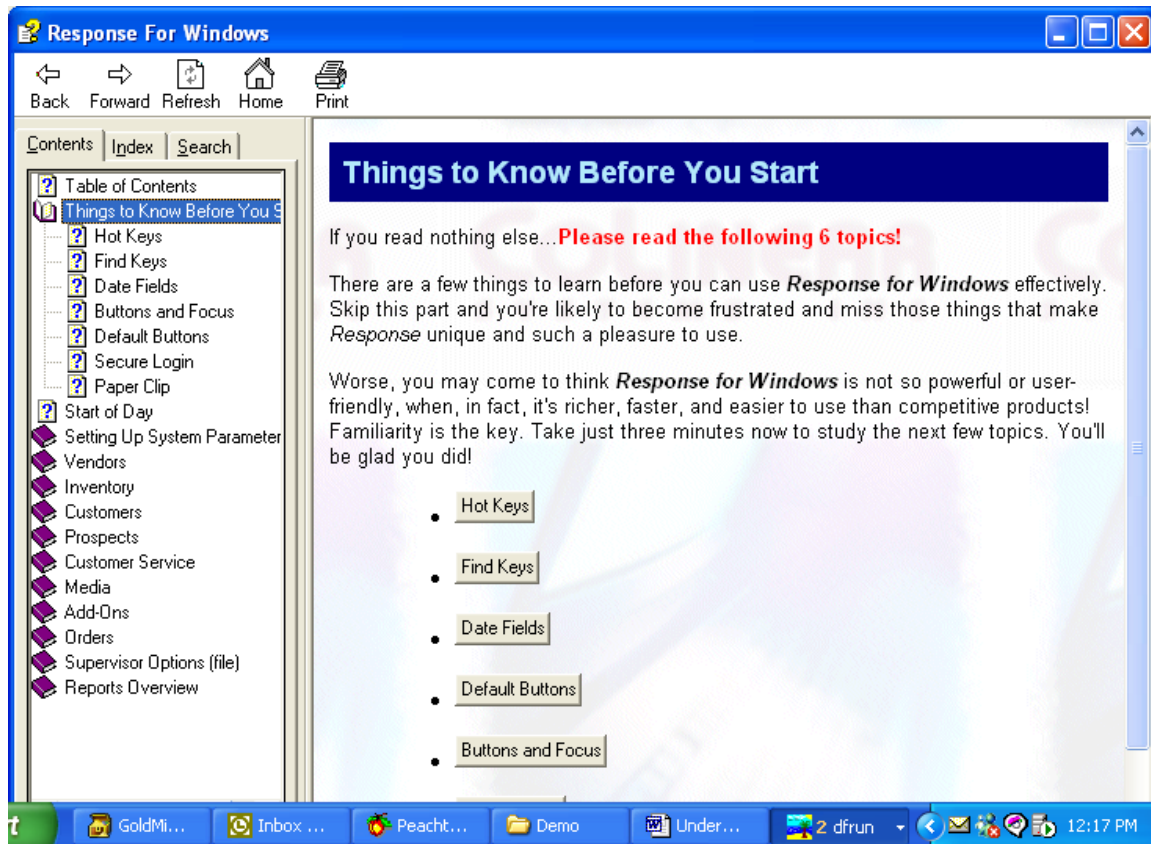




Help!

If at anytime you need help running *Response*, you have two options:

1. Press **[F1]** to jump into **Context-Sensitive Help**.
2. Select one of the **Help** menu options.





Getting Around

Moving Within Fields:

Response uses standard Windows key combinations for things like cut, copy, paste, highlight, etc.

Press:	To:
← or →	Moves the cursor right or left one space without erasing any data.
Delete	Deletes all highlighted characters (or one character to the right of the cursor).
← Bksp	Moves the cursor one character to the left while erasing data.
Ctrl + ← Bksp	Erases the entire contents of a field.

Moving Between Fields:

Response uses standard Windows keys for window navigation

Press:	To:
Tab	Move to the next field on a screen.
Enter	Move to accept an entry and move to the next highlighted window.
Esc	Close the current window (or view).

Choosing Menu Options:

Use the arrow keys to highlight the option desired and press **Enter**.
Or use your mouse to click on the option.
Or press **Alt** plus the underlined letter of the option [a Hot Key].

Press **Esc** to back up to a previous menu.



Function Keys

Function keys allow you to perform quick, pre-programmed actions with a single or dual keystroke. Use these to access records in a database, access context-sensitive help, save entries and much more.

The table below describes the function keys available in *Response*. For quick reference, refer also to the enclosed laminated “function key card.”

The Function Keys you will use most often are:

Keys:	To:
Tab	Go to NEXT ITEM or field
⇧ Shift + Tab	Back to PREVIOUS ITEM or field
F9	FIND record
F8	Find NEXT
F7	Find PREVIOUS
F2	SAVE entry
⇧ Shift + F2	DELETE record

The Save (**F2**) key is unique because, instead of having to **Tab** through every field, you may press **F2** to save and continue. If you fail to enter any required information, the system will prompt you accordingly.

Function Keys

Action	Key	Description
Help	F1	Brings up the programmed help screen to explain the screen displayed.
Next item	Tab	In some programs, moves the cursor to the next item or field.
Previous item	⇧ Shift + Tab	Moves the cursor back to the previous item or field.
Add a row	⇧ Shift + F10	Adds a row to a table.
Beginning of data	Ctrl + Home	Moves the cursor to the beginning of the data.
End of data	Ctrl + End	Moves the cursor to the end of the data.
Beginning of line	Home	Moves the cursor to the beginning of the line.
End of line	Esc	Moves the cursor to the end of the line.
Calculate	Alt + F5	Launches the Windows calculator. Note that <i>Response</i> for Windows makes its own integrated calculator available in various programs that can benefit from this.

Function Keys (continued)

Action	Key	Description
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Clear screen	F5	Clears all fields on the screen so you can enter new information.
Copy	Ctrl + C	Copies the selected text to the Windows clipboard.
Cut	Ctrl + X	Cuts the selected text and moves it to the Windows clipboard.
Paste	Ctrl + V	Pastes the Windows clipboard contents to the cursor location.
Delete character	Delete	Removes a character at the cursor location.
Delete record	Shift + F2	Deletes the current record. WARNING: This permanently removes a record from a file. An appropriate warning will display for confirmation. Exercise care when using this function key!
Erase EOL	Ctrl + Bksp Spacebar + Esc	Deletes data from where the cursor is to the end of the line.
Close Window	Esc	Exits the current window, or returns to the previous menu. Does not save the record you are exiting.
Terminate program	Alt + F4	Terminates a program. WARNING: This should only be used in emergency situations, e.g. if a fatal error message box appears and no other keys are operational.
Find record	F9	With the cursor in any field marked with the Prompt button,  , the system brings up records that match the information entered in the field
Superfind record	Shift + F9	Used the same way as Find record, but accesses multiple files on the same screen.
Next record	F8	Scrolls forward through a file to find the record you want.
Previous record	F7	Scrolls backward through a file to find the record you want.
Go back	Bksp	Removes the character entry and moves the cursor back a character space.
Insert character	Insert	Creates a space at the cursor location so you can enter a character.
Next character		Moves the cursor forward one character.
Previous character		Moves the cursor back one character.
Next panel	F6	Moves to the next panel.
Previous panel	Shift + F6	Move to the previous panel.
Perform special functions	Alt + F1 or Alt + F2	On some screens, such as in the prospecting system, these keys perform special functions. (See appropriate sections for details.)
Print screen	Alt + PrtScr	Copies the screen to the clipboard, at which point you can open a word document or word pad to paste the contents for printing.
Prompt	F4	Prompts a list of available items or codes.
Save record	F2	Saves the current entry (and may clear the current screen).



Search Options

To search for inventory items:

Ctrl+K or press the keyword search button.

This brings up the Inventory Keyword Search selection list.

To locate records quickly:

Any field that has a Prompt button, , can be used to find records.

Key	Description
F8	Find Next
F7	Find Previous
F9	Find record

Typing relevant data before pressing a FIND key refines your search.

For example, say the field is Zipcode: 

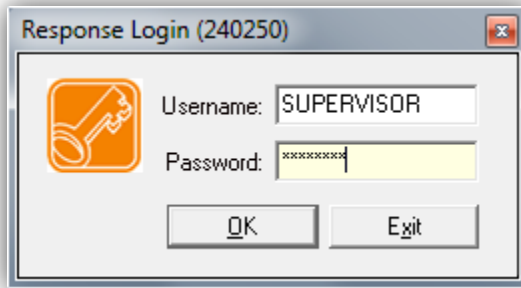
Type "30062" and press **F9**, to display the first record (if any) with zipcode 30062. If no such record exists, the first record with a higher zipcode will display instead. If no record qualifies, an appropriate message displays to tell you so.

F7 and **F8** will scroll back and forward, respectively.



Tutorial: Login & Security

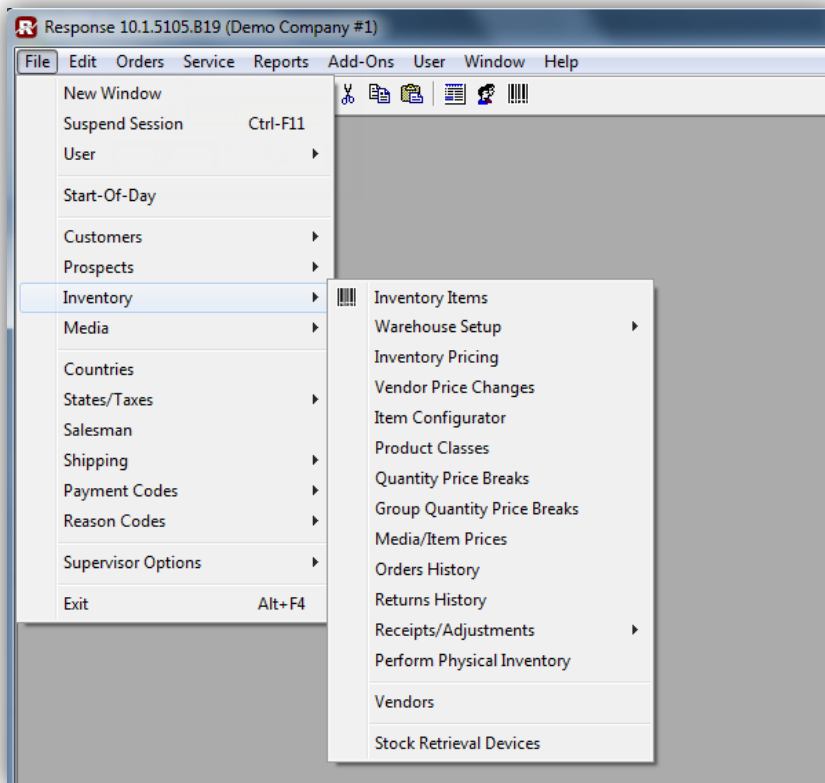
To access the system:



Login: **SUPERVISOR**

Password: **RESPONSE**

Once logged in, you'll find yourself at the Main Menu. You can use your mouse or keyboard – whichever you prefer – to explore it. The menu system is comprised of a hierarchical series of drop-down options. You can open as many different “Views” as you like. *Response* will layer all open Views just like a mini-desktop. To close an open View, press **[Esc]**.

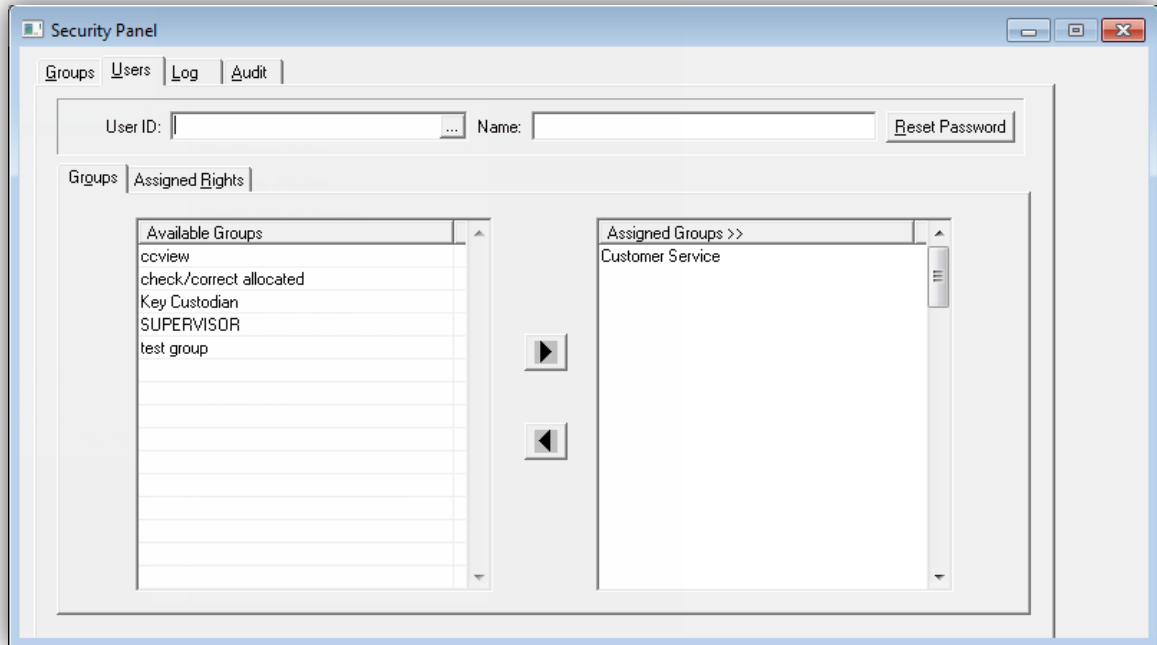




Adding New Users:

Select: **File / Supervisor Options / Security Setup**

“Supervisor Level” security is required to access this View.



1. Press **[Alt]+U** to display the Users view. Type a new User ID, then **[Tab]** to the name field. (*Response* is automatically saving this information.)
2. Type the full name then **[Tab]** to the available groups window.
3. Select the level of security you want to assign by double clicking on the appropriate row (or highlight the row then click on the  button to move the appropriate group over to the Assigned Groups column).
 - Customer Service – access to the areas needed by a typical CSR.
 - Manager – Customer Service access plus many restricted areas such as “Merge/Purge,” “Delete Inactive Customers” and “Company Setup”
 - SUPERVISOR – full access to all parts of the system
4. Press **[F2]** to save. Congratulations! You just created your first *Response* User.
5. Log out of *Response* and back in using the new User ID you just created. The default password for a new User is <blank>, so leave the password blank when you log in.

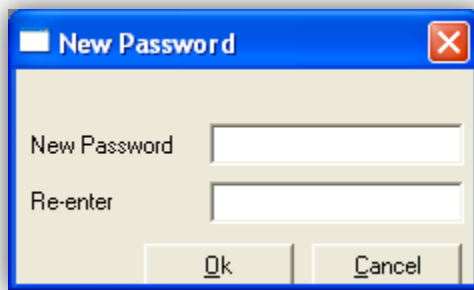


Changing your Password:

Select: **File / User / Change Password**



1. The User ID that you logged in with will be automatically entered in the Name field.
2. Type the old password, which is <blank> in this case, since you are setting your password for the first time.



3. Type in a new password, press **Tab** and re-enter it to confirm. [Passwords are not case-sensitive.]
4. Click "OK", or press **Enter** twice, to complete.

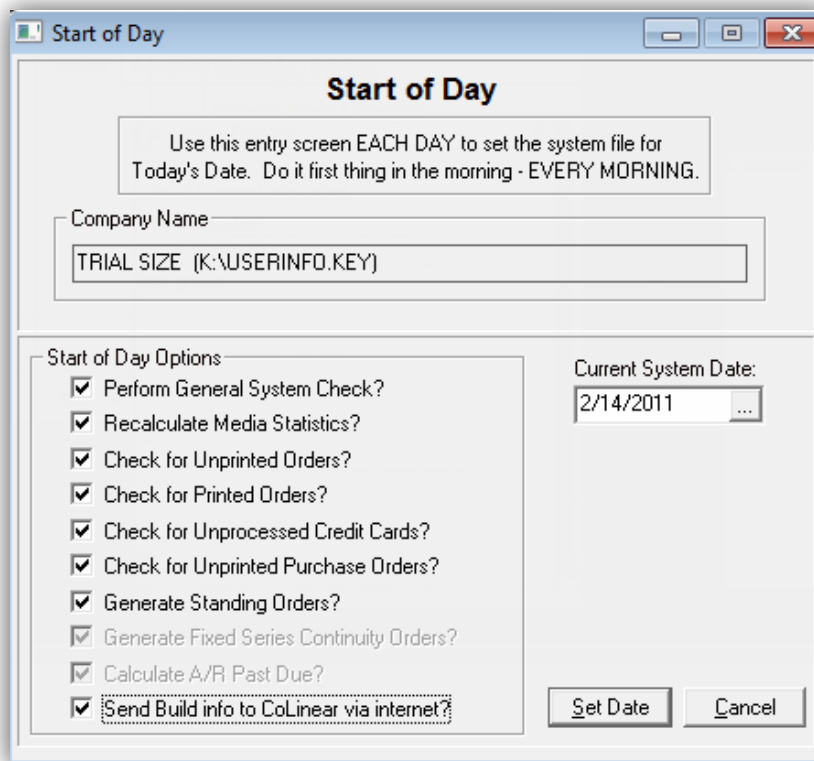
**** NOTE: FOR SECURITY REASONS, ALL PASSWORDS ARE PERMANENTLY ENCRYPTED IN RESPONSE. THERE IS NO WAY TO DETERMINE A USER'S PASSWORD — EVER (EVEN IF YOU'RE A SUPERVISOR). IF A USER FORGETS THEIR PASSWORD THE ONLY REMEDY IS TO USE SECURITY SETUP TO RESET THEIR PASSWORD TO BLANK. THEY MAY THEN LOGIN AND ASSIGN A NEW PASSWORD.**



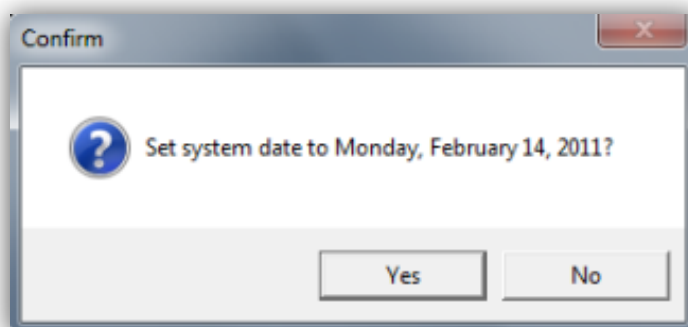
Tutorial: Start-Of-Day

Select: **File / Start-Of-Day**

At the beginning of each workday, you must set the system date by performing the Start of Day routine. This program sets the system date and optionally allows you to run a general system check, recalculate media statistics, check for unprinted orders and purchase orders, and check for unprocessed credit cards.



If you do not perform the start-of-day routine, you will be notified of the following every time you take a new order.





Tutorial: Order Entry

Select: **Orders / Order Entry/Edit**

A “Daily Specials” screen displays (conditionally) along with the main Order Entry screen.

The screenshot shows the 'Order - 1' entry form. A 'Today's Specials' window is open in the foreground, displaying a special offer: '\$5.00 off all regular sale items!'. The main form contains fields for Customer ID, Batch No., PO Number, Order Date (2/14/2011), Order Type (phone), and Status. It also includes sections for Media Source, Price Code, Division, and Customer Demographics. A 'Phones' section has dropdowns for Main, Alt, and Fax numbers. At the bottom, there are checkboxes for 'OK to Mail' and 'Residential', and buttons for 'Ship Tos...' and 'Next >'.

Order Header:

Scenario:

A customer is placing a phone order. When asked, they cannot recall if they have ever ordered before.

One way to find out is:

1. Press **[Alt]+P** to land on the phone number field.
2. Type their phone number: **“714-555-9090”** (without the dashes) then **[Tab]**. *Response* will instantly check for a match in the customer file. If the customer is found, a list (sorted by phone number) will display. If not, the cursor will just advance to the next field.



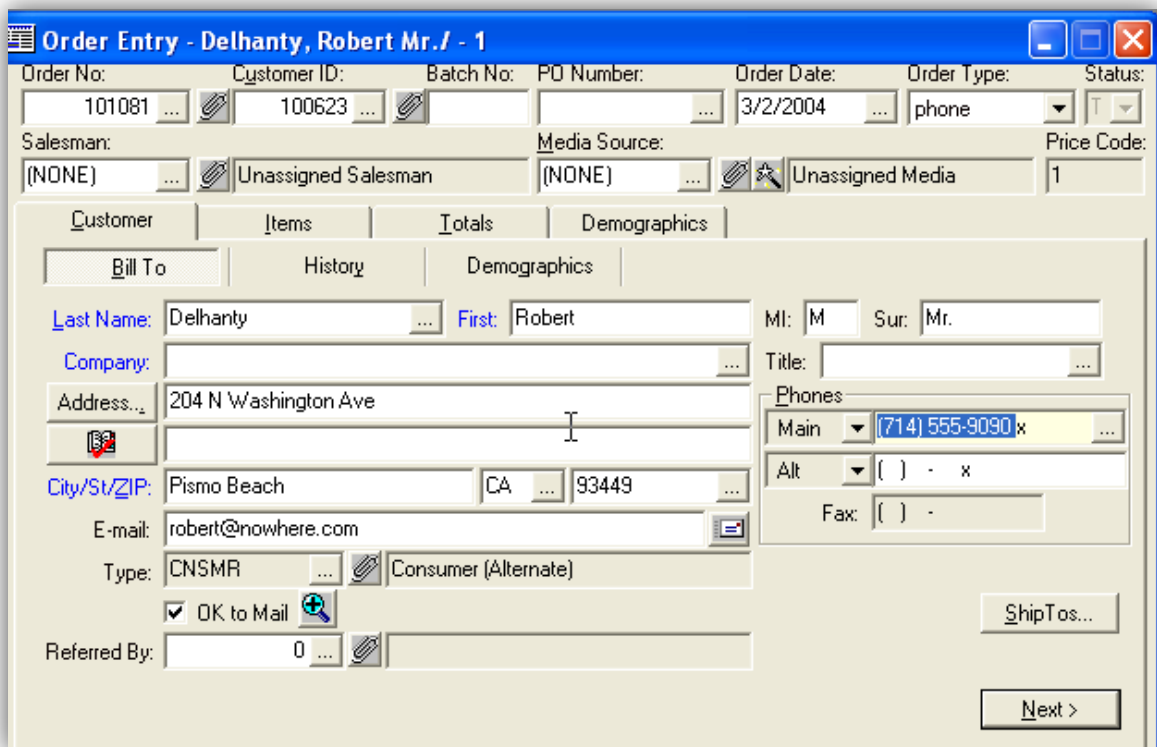
Mr. Robert Delhanty's record is found, so the search list displays:



ID	Company Name	Last Name	First Name	ZIP Code	Phone
100452		Benson	K.T.	92635	7145262193
100151		Boudreau	Walter	92703	7145547722
100623		Delhanty	Robert	93449	7145559090
100601		Quinn	David	92376	7146822678
100649		Warren	H.	92509	7146856581
100346		Schaller	Wanda	92691	7147683400

Click on OK, or press **Enter**, to select this customer and populate the order entry screen with his information.

**** Note:** When more than one customer shares the same phone number – such as multiple contacts at a business, or a mother and daughter in the same household – *Response* will group them together for easy review and selection.



Order Entry - Delhanty, Robert Mr. / - 1

Order No: 101081 Customer ID: 100623 Batch No: PO Number: Order Date: 3/2/2004 Order Type: phone Status: T

Salesman: (NONE) Unassigned Salesman Media Source: (NONE) Unassigned Media Price Code: 1

Customer Items Totals Demographics

Bill To History Demographics

Last Name: Delhanty First: Robert MI: M Sur: Mr. Title:

Company:

Address: 204 N Washington Ave

City/St/ZIP: Pismo Beach CA 93449

E-mail: robert@nowhere.com

Type: CNSMR Consumer (Alternate)

OK to Mail

Referred By: 0

Phones: Main (714) 555-9090 x Alt () - x Fax: () -

ShipTo...

Next >



Another way to find a customer is to simply key the name and address without searching at all. *Response* will automatically find and display any close matches.

We'll key straight through the customer info this time to demonstrate:

- 1) **F5** to clear the screen.
- 2) **Alt**+Z to jump to the Zipcode field.
- 3) Type "**93449**" then **Tab** (notice how city and state fill in automatically).
- 4) **Alt** +L to jump to Last Name. Type "**Delhanty**" and **Tab**.
- 5) Type "**Robert**" in the First Name field, then **Tab** to Address.
- 6) Type "**204 N Washington Ave**" on the first Address line, then **Tab**. The system automatically performs a fuzzy search and finds a match as shown here.

The screenshot shows a window titled "Duplicates" with a blue header bar. Inside, there are two tabs: "Customers" and "Prospects". The "Customers" tab is active, displaying a table with the following columns: ID, Company name, Last name, First name, and Phone. The first row of the table is highlighted in cyan and contains the following data: ID: 100623, Company name: (empty), Last name: Delhanty, First name: Robert, and Phone: (714) 555-9090. Below the table, there is an "Address" section with two input lines. Line 1 contains "204 N Washington Ave" and Line 2 is empty. Below the address lines, there are four input fields for "City", "State", "Zip", and "Country". The "City" field contains "Pismo Beach", "State" contains "CA", "Zip" contains "93449", and "Country" contains "USA". At the bottom right of the window are "OK" and "Cancel" buttons.

ID	Company name	Last name	First name	Phone
100623		Delhanty	Robert	(714) 555-9090

Address

Line 1: 204 N Washington Ave

Line 2:

City: Pismo Beach State: CA Zip: 93449 Country: USA

- **Enter** to select this record.

Good typists, in particular, prefer to just key the customer info since it's the easiest and most consistent way to enter orders. It also requires the fewest keystrokes and mouse movement overall. This is especially true when entering "mail" orders. Typing in the name and address—as though the customer were new—will almost always find a match (if there is one) and display it



immediately after keying the address. Data entry is faster, more fluid and more consistent this way.

Manual searches using the Customer Selection List are convenient but not always the best way. Searching wastes a lot of time, by definition in fact, when the customer is not in your database. A manual search is probably best avoided unless there is good reason to believe the customer is already in the database.

NOTE: For times when searching is desirable or appropriate, several fields are indexed including Company Name, Last/First Name, Zip Code, City/State, and Phone Number (you may also search by Email Address if you create an indexed demographics field).

- Press **[Alt]+Y** to view Mr. Delhanty's history. This gives you some historical information about this customer.

Lifetime		
	Number of	Amount of
Orders:	6	1043.50
Returns:	0	0.00
Gifts:	0	0.00

Orders	
High:	354.00
Avg:	\$173.92

Credit	
Limit:	\$0.00
Avail:	\$0.00

At this point we can take one of several different paths to complete the order. Let's take care of Media/Source code and Salesman right now to get them out of the way.

- Press **[Alt]+M** to jump to the Media field.
- Type **"F&W1097"** and **[Tab]** to assign the **October '97 Food and Wine Catalog** to this order.
- Press **[Shift]+[Tab]** to move to the Salesman field.



- We want to assign “**Jan Hartford**” so type the letter “**J**” followed by **[F9]** [i.e. find the first Salesman ID beginning with “J”].

Of course, we could have pressed the prompt key, **[F4]**, to display the full Salesman list, or just typed in the code, JLH, directly.

Order Entry - Delhanty, Robert Mr./ - 1

Order No: 101081 Customer ID: 100623 Batch No: PO Number: Order Date: 3/2/2004 Order Type: phone Status: T

Salesman: JLH Jan Hartford Media Source: F&W1097 Food&Wine Oct97 Price Code: 1

Customer | Items | Totals | Demographics

Bill To | History | Demographics

Purchases

First:	4/12/2000
Last:	3/2/2004
Prior:	3/14/2002
MTD:	1043.50
YTD:	1043.50
YTD Profit:	549.47

Lifetime

	Number of	Amount of
Orders:	6	1043.50
Returns:	0	0.00
Gifts:	0	0.00

Orders

High:	354.00
Avg:	\$173.92

Credit

Limit:	\$0.00
Avail:	\$0.00

Receivables Orders

Next >



Multiple ShipTos

Response supports Multiple ShipTos per order, with the capability of separate shipping methods per ShipTo.

- Press **[Alt] + B** to jump back to the main customer screen.
- Press **[Alt] + S** to jump to the ShipTo screen.

The customer is automatically defaulted as the first ShipTo address. You can add new ShipTos to the order by clicking on the Add button, or by pressing **[Alt] + A**. Response stores all prior ShipTos for a customer. To find prior shipping addresses, click on the Find Prior Shipping Addresses button or press **[Alt] + F**.

	Last name	First name	Company name	ZIP Code	Phone
☒	Adams	Samuel	Sterling Bank	77007	(555) 555-1212
☐	Delhanty	Robert		93449	(714) 555-9090
☒	Den Beste	Alicia	CoLinear Systems, Inc.	30062	(770) 643-0000
☐	Hunt	Helen		90210	(555) 123-6987



Select the ShipTo addresses for the order and click OK or press **Alt**+O. Note that each ShipTo can have separate shipping methods.

The 'Order ShipTos' dialog box is shown with the following fields and sections:

- Find Prior Shipping Addresses...** (button)
- Shipping Addresses:**
 - ☐ [DEFAULT] Robert Delhanty/Pismo Beach
 - ☒ [DEFAULT] Alicia Den Beste/Marietta GA
 - ☐ [DEFAULT] Samuel Adams/Houston TX
- Personal Information:**
 - Last/First/M: Den Beste Alicia Sur: Ms.
 - Company: CoLinear Systems, Inc.
 - Address: 4343 Shallowford Drive, Suite H7
 - City/St/Zip: Marietta GA 30062
 - Attn:
 - Phone: (770) 643-0000 x Residential Copy from Sold To
 - email: adenbeste@colinear.com Save Prospect
- Shipping Info:** (indicated by a red arrow)
 - Gift Order: ☐ Message: From Warehouse: DEFAULT
 - Ship Method: FDX
 - Requested: 3/2/2004 Weight: 0.0
 - Shipping: \$0.00 Rate Shop
 - Tax: 0.00% \$0.00
- ShipTo Actions:**
 - Add Delete Duplicate < Previous Next > View Items... Enter Items Close

To begin entering line items, click on the Enter Items button or press **Alt**+I.



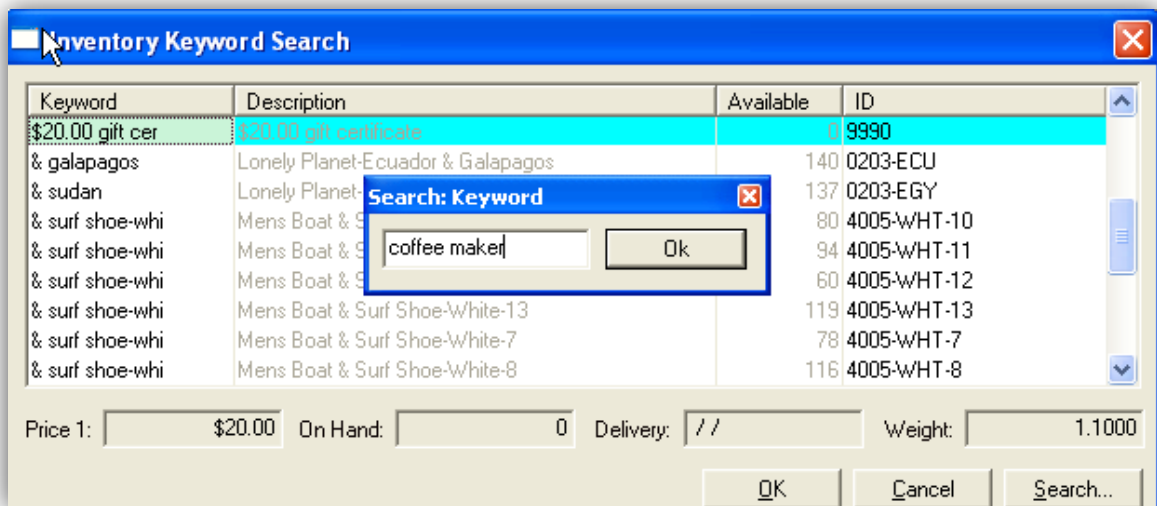
Line Items

Scenario:

Mr. Delhanty would like to order a “Brew for the Road” coffeemaker (see page 23 of the TravelSmith catalog). He doesn’t know the Item Number.

We’ll use the *Response* keyword retrieval engine to quickly and easily locate this item.

- Press **[Alt]+I** to switch to the Items tab and land in the **ITEM ID** field.
- Press **[Ctrl]+K** to bring up the Inventory Keyword Search.



- Type **coffee maker** and press **[Enter]** to execute the search.
- Before selecting the coffeemaker, bring up the search window again by pressing **[Alt]+S**, then type **brew** **[Enter]**. Notice how the same item is located differently by another keyword.



Inventory Keyword Search

Keyword	Description	Available	ID
coffee maker	Brew For The Road Coffee Maker	85	9403
coffee-10	Womens Track Shoe-Coffee-10	141	4503-COF-10
coffee-10/44	Mens Track S	58	4003-COF-10
coffee-11	Womens Trac	129	4503-COF-11
coffee-11/45	Mens Track S	65	4003-COF-11
coffee-12/46	Mens Track S	138	4003-COF-12
coffee-13/47	Mens Track Shoe-Coffee-13/47	95	4003-COF-13
coffee-5	Womens Track Shoe-Coffee-5	54	4503-COF-5
coffee-6	Womens Track Shoe-Coffee-6	63	4503-COF-6

Price 1: \$42.00 On Hand: 92 Delivery: // Weight: 1.1000

OK Cancel Search...

- Next, press **[Enter]** to select the coffeemaker.
- **[Tab]** to the Qty (Order Quantity) field and type "1".
- Press **[Alt]+L** to find or create a lineitem message for this item, if you'd like. This message prints below this lineitem on the combination picking ticket/packing list. Press the Prompt key, **[F4]**, to select from a list of any predefined messages or type your own.

Order Entry - Delhanty, Robert Mr./ - 1

Order No: 101081 Customer ID: 100623 Batch No: PO Number: Order Date: 3/2/2004 Order Type: phone Status: T

Salesman: JLH Jan Hartford Media Source: F&W1097 Price Code: 1

Food&Wine Oct97

Line	Item ID >>	Description	Qty	Avail	Su...	Sh...	Price	Extended
1	9403	Brew For The Road Coffee Maker	1	85	1	0	\$42.00	\$42.00
2			1	0	0	0	\$0.00	\$0.00

Line Message... Please Note:

Shipping Addresses: Select = Shift-F3

☒ [DEFAULT] Robert Delhanty/Pismo Beach - Current Shipping Address
 Robert Delhanty
 204 N Washington Ave
 Pismo Beach, CA 93449
 Ship 03/02/2004 via FDX from DEFAULT

☐ [DEFAULT] Samuel Adams/Houston TX, :
☐ [DEFAULT] Alicia Den Beste/Marietta GA

Gross: \$42.00
 Total Qty: 1
 Total Wt: 2

Ship Tos... Order Review

< Back Next >



- **Tab** to accept the default price of 42.00 and to save the first line item.

Scenario:

Mr. Delhanty now wants to order a World Traveler Blazer, size 42-Regular in tan for Mr. Adams. This item comes in various colors and sizes, so we'll use the Response Item Configurator.

- First we need to select Sam Adams as the ShipTo for this item. In the lower left hand corner of the screen, click on Sam Adams.
- Now, shift focus back to the order lines by placing your cursor on the next order line below the coffee maker.

Order Entry - Delhanty, Robert Mr. / - 1

Order No: 101081 Customer ID: 100623 Batch No: PO Number: Order Date: 3/2/2004 Order Type: phone Status: T

Salesman: JLH Jan Hartford Media Source: F&W1097 Price Code: 1

Food&Wine Oct97

Line	Item ID >>	Description	Qty	Avail	Su...	Sh...	Price	Extended
1	9403	Brew For The Road Coffee Maker	1	85	1	0	\$42.00	\$42.00
2			1	0	0	0	\$0.00	\$0.00

Line Message... Please Note:

Shipping Addresses: Select = Shift-F3

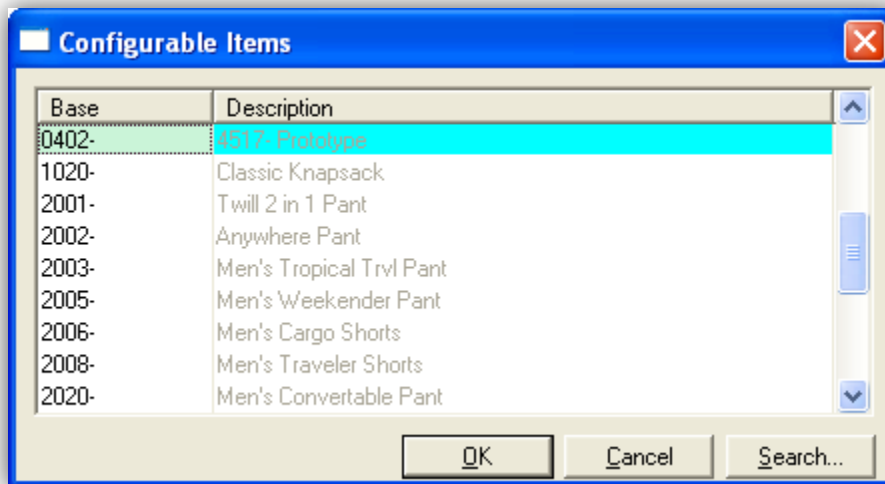
☐ [DEFAULT] Robert Delhanty/Pismo Beach
☒ [DEFAULT] Samuel Adams/Houston TX, :
☐ [DEFAULT] Alicia Den Beste/Marietta GA

Current Shipping Address
Samuel Adams Sterling Bank
5757 Memorial Drive, Suite 200
Houston, TX 77007
Ship 03/02/2004 via FDX from DEFAULT

Gross: \$42.00
Total Qty: 1
Total Wt: 2

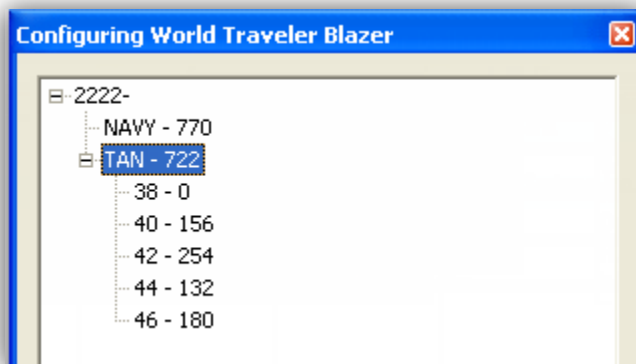
Ship Tos... Order Review
< Back Next >

- Press **Ctrl**+G in the Item ID field to see a list of configurable items.



- Select Item 2222, the World Traveler Blazer and **Enter**.
- The available colors display. Select "TAN" and **Enter**.

Notice that the quantity available figure is shown to the right. This is the aggregate total available in all variations (e.g. sizes, colors, grades, etc.) at all levels *below* this point.



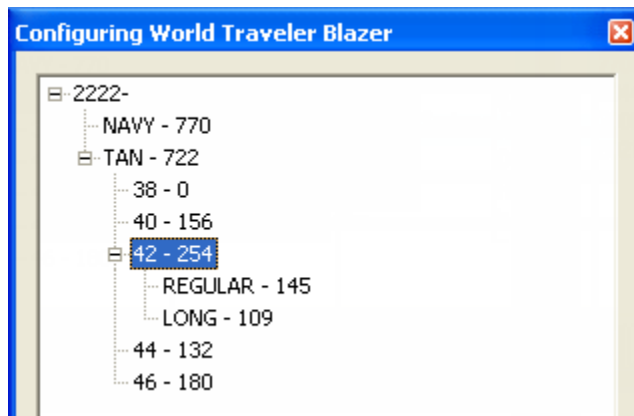
This is a very powerful feature because operators can see, at a glance, the combined stock for all remaining item variations. If 0 is shown there is no stock for any of the possible variations, no matter how many levels may lie below the current view. The operator doesn't need to bother to "drill-down" any further looking for something that's "in-stock" because it's obviously a dead-end.

For example, if the operator sees 0 available in NAVY (no matter what the size), but sees plenty available in TAN, he or she can convey this to the customer *immediately*. No more wasting time and building frustration by fruitlessly checking each Navy size, one-by-one. *Response* CSRs know the score ... quickly and effortlessly.



Other systems generally don't show you stock availability until reaching the end of the selection tree. In *Response* we'll show you downstream availability at *every level*. "Rolling up" the available quantities of all remaining product variations, in real-time, is a uniquely powerful *Response* feature and an invaluable aid to agent productivity and delivering superior customer service.

- All sizes are displayed, along with the combined quantities of their variations. Select size "42" and **Enter**.



- Select "Regular" and **Enter**.

Having reached the end of the configuration tree, a unique SKU is selected and displayed to the line item entry window.

- Type " 1" in the Order Quantity column.
- Press **Tab** to accept the default price and save that line item.



Order Entry - Delhanty, Robert Mr. / - 1

Order No: 101081 Customer ID: 100623 Batch No: PO Number: Order Date: 3/2/2004 Order Type: phone Status:

Salesman: JLH Media Source: F&W1097 Price Code: 1

Jan Hartford Food&Wine Oct97

Line	Item ID >>	Description	Qty	Avail	Su...	Sh...	Price	Extended
1	9403	Brew For The Road Coffee Maker	1	85	1	0	\$42.00	\$42.00
2	2222-TAN-42R	World Traveler Blazer-Tan 42r	1	143	1	0	\$159.00	\$159.00
3			1	0	0	0	\$0.00	\$0.00

Line Message... Please Note:

Shipping Addresses: Select = Shift-F3

☐ [DEFAULT] Robert Delhanty/Pismo Beach
☒ [DEFAULT] Samuel Adams/Houston TX, : Samuel Adams Sterling Bank
☐ [DEFAULT] Alicia Den Beste/Marietta GA 5757 Memorial Drive, Suite 200
Houston, TX 77007

Current Shipping Address: Ship 03/02/2004 via FedEx from DEFAULT

Gross: \$201.00
Total Qty: 2
Total Wt: 3

Ship Tos... Order Review

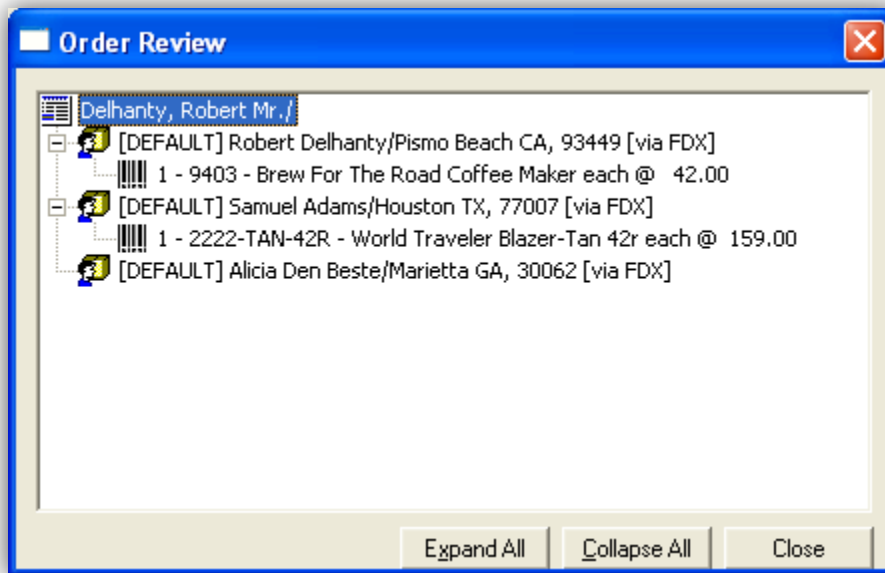
< Back Next >

The *Response* item configurator enables even newly hired CSR's to accurately, efficiently and effectively take orders for "complex" inventory such as apparel or shoes.

By presenting selections one logical level at a time with the available stock, an otherwise complex and confusing task is reduced to sheer simplicity. The item configurator, in concert with keyword searching, can dramatically reduce training requirements as well as operator fatigue and errors.

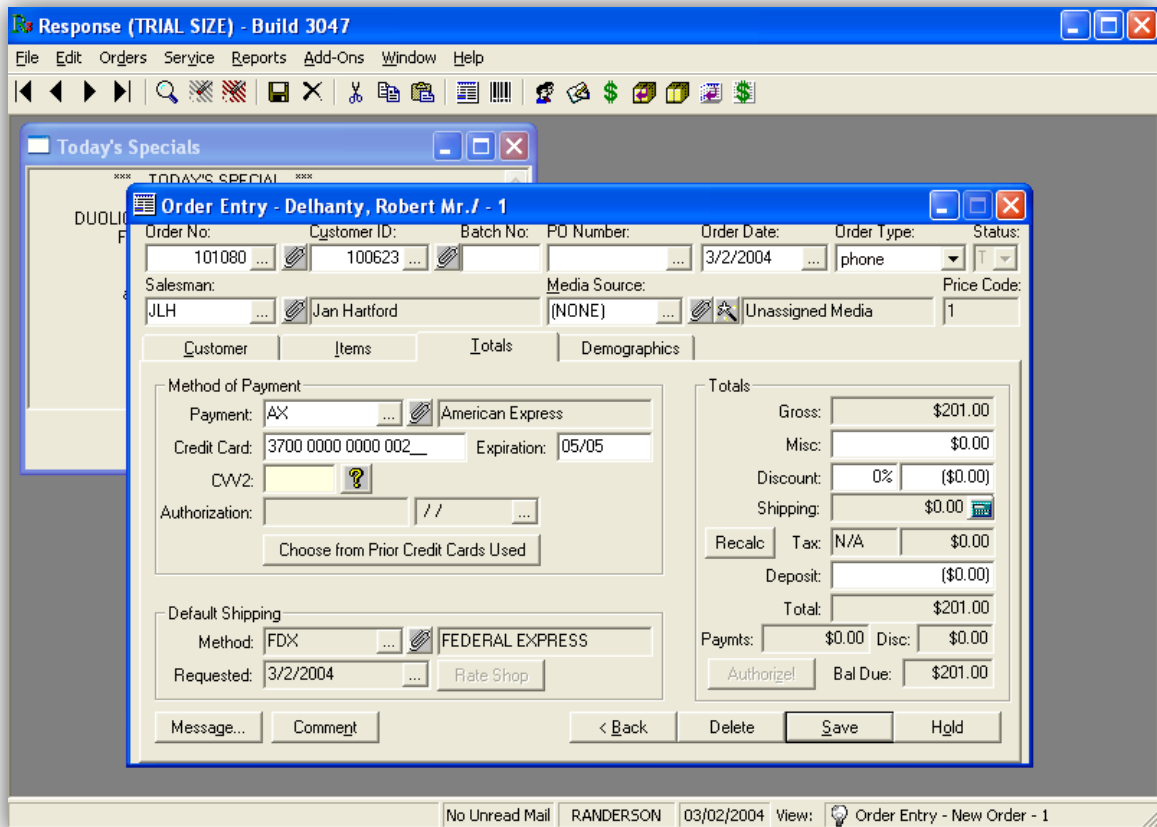
At this point we could continue entering line items, modify or delete those already entered, or complete the order. Prior to completing the order, let's review the order.

- Press **[Alt]+O** to review the order.



Now let's complete the order

- Press **[Alt]+T** to move to the Totals panel.



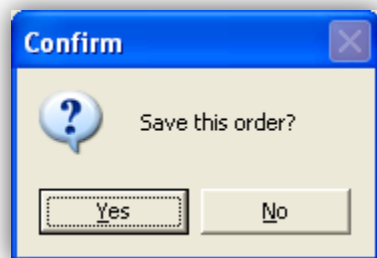


- 1) Press **[Tab]** to accept **American Express** in the Pay Code field. *** Note: The last credit card used by the customer displays by default.*
- 2) Accept the default expiration date (or change it if it has expired).
- 3) You can authorize credit cards directly from order entry using PC Charge by clicking the Receive Auth. button.
- 4) Type **"UPS"** and **[Tab]** in the Ship Method field if it isn't already displayed.
- 5) You may **[Tab]** through the Requested shipping date to accept the default (which defaults to today's date) or select a future date to ship the order. If you already pressed **[Tab]** to advance, press **[Shift] + [Tab]** to go back.
- 6) Press the Prompt key, **[F4]**, to display the calendar. Use it to view and select dates.
- 7) Complete the order by pressing **[Tab]** through the various totals fields: Misc, Discount, Shipping and Tax.

Shipping charges are calculated automatically based upon standard tables (order amount, shipping weight) or by an external, user-programmable script.

Sales tax can be configured to assess on a statewide or zip/county basis. An external script may also be used to drive more complex sales tax calculations, if warranted.

- **[Tab]** past the Deposit field to highlight the "Save" button.
- Now, complete the order by pressing **[Alt]+S** or clicking Save. The order is quickly saved and all panels are cleared to accept your next order.





Order Status Codes:

All orders in *Response* will have a status. Following is a detailed description of the various order statuses in the Order Process and the steps required to complete that order.

E – Entered

These are orders that have just been entered. The “age” of “E” status orders depends on your business, and on the “Requested Ship Date” of the orders entered. Orders do not print until the requested ship date is the same as the date for which you are printing picking tickets. If your customers normally do not specifically request that the order be shipped at some future date, then the requested ship date will generally be the same as the order date. Under these circumstances, you should not have “E” status orders older than a couple of days on the system. If however, your business is such that your customers normally request that the order be filled sometime in the future (e.g. “Ship in 2 weeks”), then you will have “E” status orders on the system that are two or more weeks old. In this situation, you should decide what is an acceptable “age” for “E” status orders.

Required Action:

1. Print Picking Tickets
2. Confirm Orders

X – Canceled

These are orders that have been canceled for some reason that is indicated by the CSR at the time of cancellation. No further action is required.

D – Credit Card was declined through ECC

These are credit card orders that have been declined. You should not have “D” status orders that are more than a couple of days old on the system.

Required Actions:

1. Contact the customer who placed the order, inform them that the card was declined, and request an alternative method of payment.
2. If you receive an alternative payment method, you should go into Order Entry and enter the new payment method, change the status to E, and save the order.
3. If you do not receive another payment method, you must cancel the order. There is no reason to keep the order on the system if the customer is unwilling or unable to
4. furnish payment. Until the order is cancelled, it remains “Open” and will continue to affect the “Committed Qty” in your Inventory File, as well as sales figures.



5. Print Picking Tickets
6. Confirm Orders

H – Hold

These are orders that have been placed on Hold. There are a number of reasons why people want to place orders on Hold, but the end result should always be the same – it should be taken off hold. As long as an order is on hold, no further processing of the order can take place. However, the order remains “open,” the order continues to “commit” inventory, and your sales/profit figures reflect this order as a “sale.” Since placing an order on Hold is a temporary measure, you should take the order off Hold after a period of time. This time period is up to you, and depends on what you are waiting for. You should periodically review these orders to ensure that they don’t get left behind.

Required Action:

1. Modify Order (take off hold)
2. Print Picking Tickets
3. Confirm Orders

W – Printed, 1st Time

These are orders that have been printed for the first time but not yet confirmed. It is good practice to print, ship and confirm orders on the same day. If not, you may find yourself in the situation where the order printed and was shipped, but not confirmed. As the days pass, it becomes less likely that this error will be found, and becomes impossible to find out what did happen when the problem is finally discovered. For this reason, your “W” status orders should not be older than a couple of days.

Required Action:

1. Confirm Orders

NOTE: THE DATE USED IN THIS REPORT IS THE REQUESTED SHIP DATE, WHICH MAY NOT BE THE SAME AS THE ORDER DATE.

Q – Printed, 2 or more times

Formally Backordered (status B or P) now printed again by selecting one of the following order types, backorders or all, in the print picking ticket dialog box. If you have received stock for various items those will be “suggested” to ship on the new picking ticket. “Q” status orders are backorders that have been printed but not confirmed. They are similar to status W.

**Required Action:**

1. Confirm Backorders

B – Fully Backordered

These are orders that are confirmed as completely backordered. These orders start out as Status E and must be printed and confirmed before they become status B. It is quite likely that you have some “B” status orders on your system. However, the critical issue with backorders is not the number, but the “AGE” of the order. There is a danger that backorder records can become neglected if not addressed on a regular basis. An “acceptable age” for backorders can only be determined by you and your organization. If you are normally out of stock at any given time for more than 1 week, then a reasonable age for your backorders would be 1-2 weeks. Any backorders older than this have been neglected and need to be processed.

Required Actions:

1. Receive Inventory
2. Allocated Inventory to Lines
3. Print Picking Tickets
4. Confirm Orders

P – Partially Backordered and Partially Shipped

These are backorders where part of the order has already been confirmed as shipped. “P” status orders should be treated the same as “B” status orders above.

S – Shipped in Full

The order has been confirmed as shipped. The order is now complete, and no further action is required.



Tutorial: Customer Service

The *Response* Customer Service module allows you to find customers, orders, inventory and more, quickly and easily. You can even “drill-down” to see the details of shipments, returns and all financial transactions associated with a customer or order. First, let’s find the order we just entered.

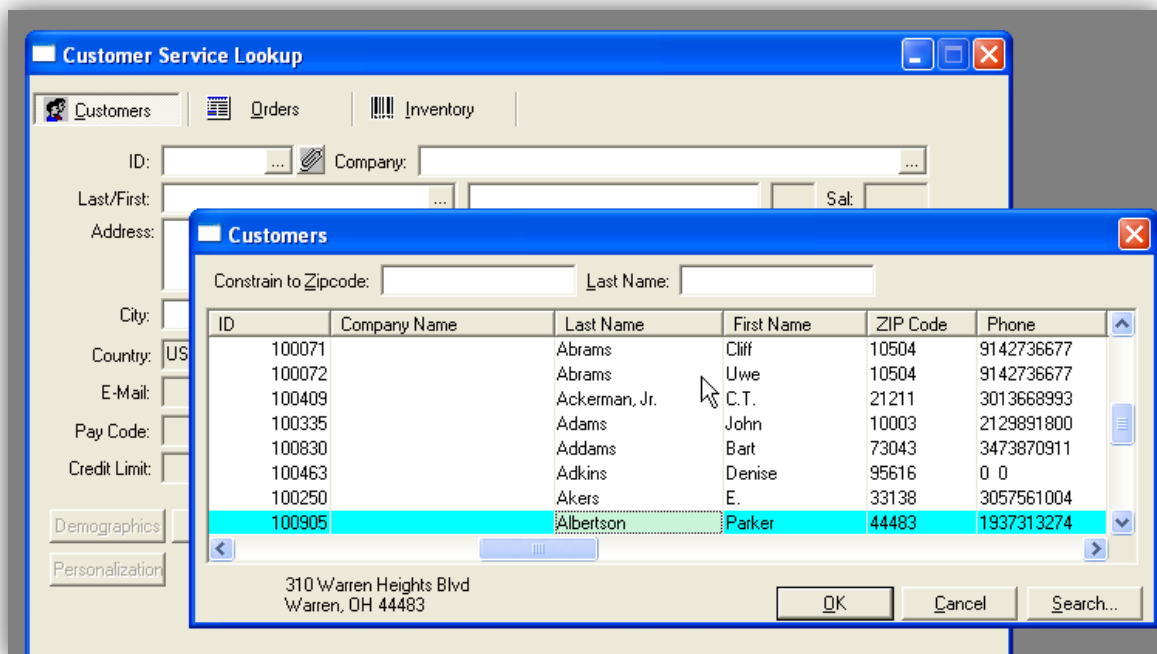
Customer & Order Lookup:

Select: **Service / Lookup**

- If it isn’t already showing in the view, click on the Customers tab or press **[Alt]+C**

Notice the  fields. These are searchable, as you’ll recall, either via FIND keys or a Selection List. Selection lists have the added advantage of sometimes offering multiple search criteria. Let’s have a look...

- **[Tab]** to Last Name and press **[F4]**.



Notice that all of the columns on the Selection List have black text. These are all searchable. In some other Selection Lists some columns may have gray text. These are not searchable.



The highlighted column (Last Name) denotes the currently active search field. To change the active search field, either **Tab** (or mouse click) to a column and press **Alt+S** to activate the search window. You may also just start typing and the Search window will pop up automatically.

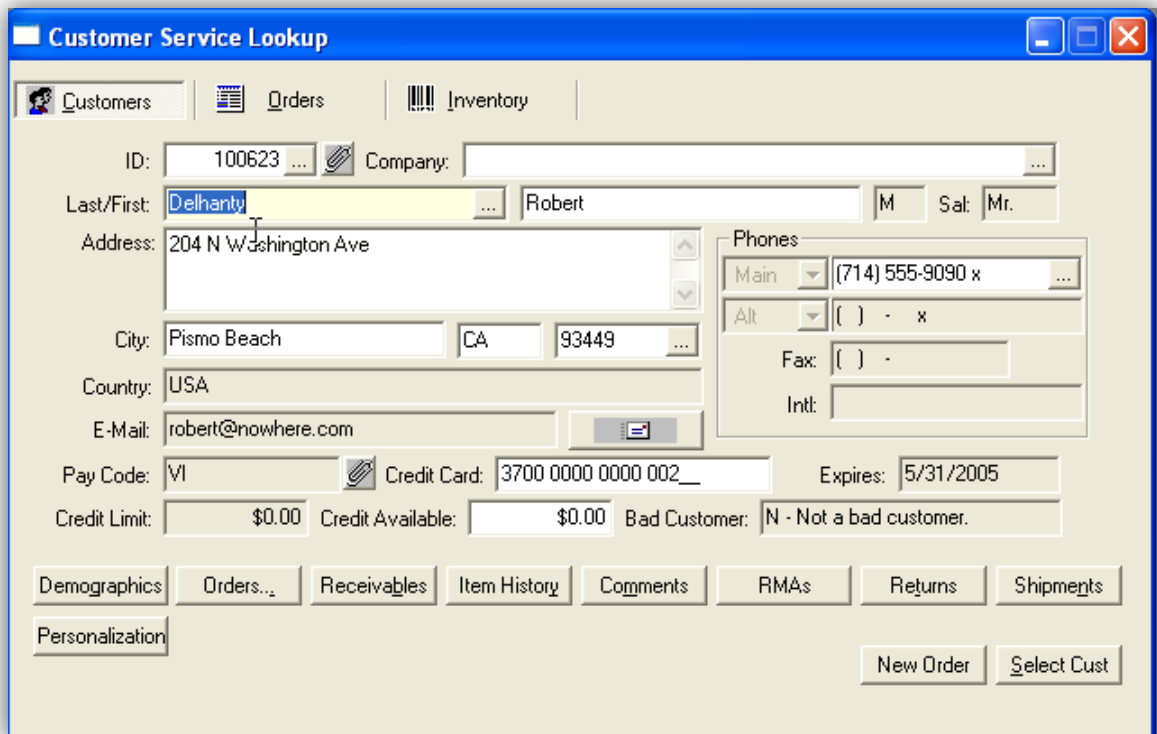
- Press **Alt+S** now to search by Last Name. The currently highlighted record's Last Name displays as the default. Press **Ctrl+←Bksp** or **Delete** to erase the highlighted contents of the field.
- Now type **Del** and press Enter to find the first customer whose Last Name begins with the letters "Del" (this is not case-sensitive).

ID	Company Name	Last Name	First Name	ZIP Code	Phone
100317		Deflesco	Thomas	60619	3122240493
100541		Deitering	Nancy	51555	7126422650
100131		Delano	John	21218	3014675553
100623		Delhanty	Robert	93449	7145559090
100773		Dembe	Carol	11720	5167372143
100476		DeNardo	Royal	06807	2036611243
100957		Detter	Donna	08754	3279377493
100519		DeWitt	Nancy	20817	3013652786

Notice John Delano is highlighted because he's the first customer whose name begins with "Del".

- Select Robert Delhanty using the mouse, and then hit **Enter**. Robert Delhanty's record displays along with various Customer Service options to choose from.

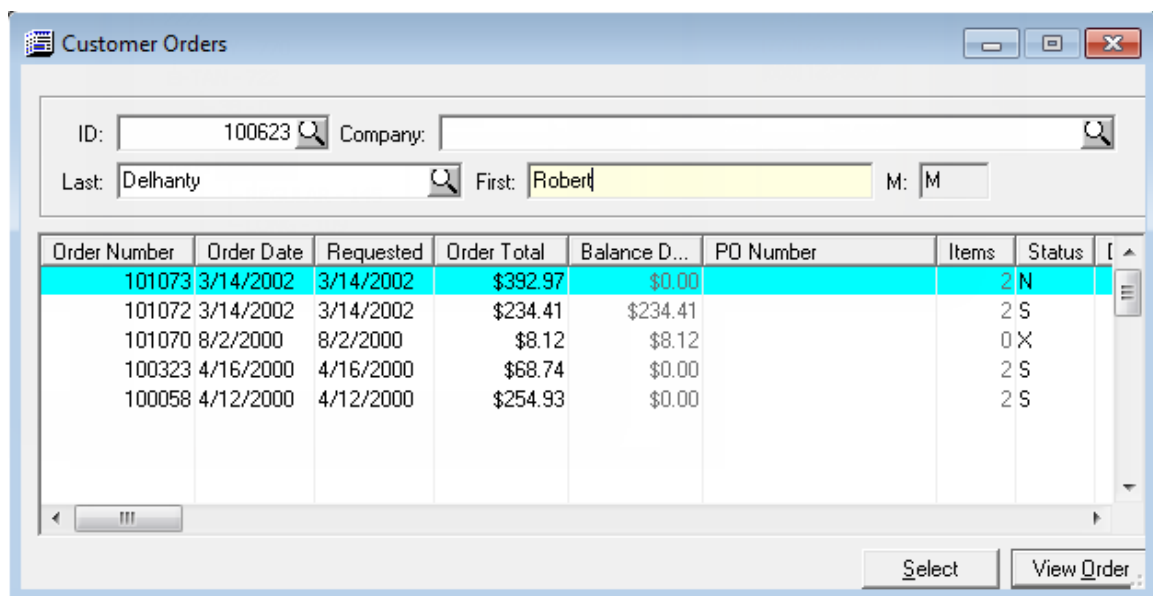
**** NOTE: FROM HERE, YOU CAN VIEW MR. DELHANTY'S CURRENT ORDER, ORDER HISTORY, COMMENTS, RETURNS, SHIPMENTS... PLUS ADD COMMENTS, CHANGE HIS CONTACT OR CREDIT CARD INFORMATION, MODIFY AN EXISTING ORDER, OR CREATE A NEW ONE.**



The Customer Service Lookup window displays customer information for ID 100623, Robert Delhanty. The form includes fields for Last/First, Address, City, State, Zip, Country, E-Mail, Pay Code, Credit Card, Expires, Credit Limit, Credit Available, and Bad Customer status. It also features a Phones section with Main, Alt, Fax, and Intl fields. At the bottom, there are buttons for Demographics, Orders..., Receivables, Item History, Comments, RMAs, Returns, Shipments, Personalization, New Order, and Select Cust.

Field	Value
ID	100623
Company	
Last/First	Delhanty Robert
Address	204 N Washington Ave
City	Pismo Beach
State	CA
Zip	93449
Country	USA
E-Mail	robert@nowhere.com
Pay Code	VI
Credit Card	3700 0000 0000 002
Expires	5/31/2005
Credit Limit	\$0.00
Credit Available	\$0.00
Bad Customer	N - Not a bad customer.

- Click the button marked "Orders..." at bottom of screen. This displays a summary of all the customer's orders.



The Customer Orders window displays a list of orders for customer Robert Delhanty. The table includes columns for Order Number, Order Date, Requested, Order Total, Balance D..., PO Number, Items, and Status. The first order (101073) is highlighted in blue.

Order Number	Order Date	Requested	Order Total	Balance D...	PO Number	Items	Status
101073	3/14/2002	3/14/2002	\$392.97	\$0.00		2	N
101072	3/14/2002	3/14/2002	\$234.41	\$234.41		2	S
101070	8/2/2000	8/2/2000	\$8.12	\$8.12		0	X
100323	4/16/2000	4/16/2000	\$68.74	\$0.00		2	S
100058	4/12/2000	4/12/2000	\$254.93	\$0.00		2	S

- The "Orders" tab (next to "Customers") shows order header information and includes several other order-related options. Press **Alt+O** to switch to it.



Customer Service Lookup

Customers Orders Inventory

Order No: 101080 Customer ID: 100623 Batch No: PO Number: Order Date: 3/2/2004 Status: E Salesman: JLH

Media Source: (NONE) Payment: AX Credit Card: 3700 0000 0000 002_ Expires: 5/31/2005 Authorization: Order Source: phone

Shipping Addresses

☒ [DEFAULT] Robert Delhanty/Pismo Beach
☐ [DEFAULT] Samuel Adams/Houston TX,

ShipTo: 101090 Status: E

Detail:
Robert Delhanty
204 N Washington Ave
Pismo Beach, CA 93449 USA
(714) 555-9090
*** Ship on 03/02/2004 via FDX ***

Gross: \$201.00
Misc: \$0.00
Discount: (\$0.00)
Shipping: \$17.50
Tax: \$0.00
Total: \$218.50
Paymt: \$0.00 Dis: \$0.00
Bal Due: \$218.50

Lineitems Shipments B/O P/O

Customer Lineitems Comments Deposits RMAs Returns Shipments B/O P/O

☐ Order is Locked for Modification

- Let's take a look at the "Line Items" by pressing **[Alt]+L**

Order Lineitems

Order: 101080 Customer: 100623 Batch No: Order Date: 3/2/2004

Name: Robert Delhanty Company:

Line No	Item ID	Order	B/O	Shpd	Sugg	Price	Amount	Ship Date	Status	Kit	W/hs
1	9403	1	0	0	1	\$42.00	\$42.00		E		1
2	2222-TAN-42R	1	0	0	1	\$159.00	\$159.00		E		1

Brew For The Road Coffee Maker/

ShipTo: Robert Delhanty
204 N Washington Ave
Pismo Beach, CA 93449

P/O Inventory Workorders

Ctrl+K to suppress kit components

- We can drill-down further to the Inventory file or review Purchase Orders if we wish. At a glance, we can see what has shipped and what has not.



- We can activate the “Shipments” tab to see the details of an order’s individual shipments. Activating “Shipments” then “Items” for a previous order brings up:

The screenshot shows the 'Response (TRIAL SIZE) - Build 3047' application window. The 'Order Shipments' sub-window is active, displaying order details for Order # 101080, Company: Delhanty, First: Robert, M: M. Below this is a table with columns: Trans ID, Confirm, Ordered, From W/hs, Auth'd, Auth Code, Shipped, Charged, Pay, Amount, S, R. The first row shows Trans ID 0. Below the table is a 'Shipment Detail from Manifest' section with fields for Shipped Via, Tracking #, Freight, Weight, Picker, and Packer. At the bottom of the sub-window are buttons: Issue RMA, UPS Track, Pick Ticket, Items (highlighted), Credit Card, and Amounts. Below the sub-window is a navigation bar with buttons: Customer, Lineitems, Comments, Deposits, RMAs, Returns, Shipments, B/O, P/O. At the bottom of the main window is a status bar with text: No Unread Mail, RANDERSON, 03/02/2004, View: Order Shipments.

- Other drill-downs from “Shipments” include “UPS Tracking” which shows the UPS tracking information, “Pick Ticket” which allows you to view the pick ticket for the order, “Credit Card” charge details and other “Amounts” associated with the selected shipment transaction.

Please spend a few moments to browse the numerous options available to you. We’ve barely scratched the surface here.

Try to review completed as well as open orders to get a broader perspective of the options available in either case.



Inventory Lookup:

Suppose a customer calls to see what high-quality binoculars we carry. It's easy!

- Activate the "Inventory" tab, press **Ctrl**+K to activate the keyword search, and immediately start typing **binocular** and **Enter**

The "Inventory Keyword Search" dialog box displays a list of binoculars. The first row is highlighted in blue.

Keyword	Description	Available	ID
binocular	Olympus 10x24 Pocket Binocular	94	5004
binocular	Waterproof Binocular	101	5011
binocular-7x20	Nikon Travelite Binocular-7x20	122	5002
binocular-9x25	Nikon Travelite Binocular-9x25	102	5001
binoculars	Leica Pocket Binoculars	112	5003
binoculars	7 X 15 Zoom Binoculars	150	5006
binoculars	Ruby-Coated Mini Binoculars	115	5008
binoculars	Olympus 8x22 Pocket Binoculars	69	5009
binoculars	Micro Binoculars	44	5015

Price 1: \$138.00 On Hand: 94 Delivery: // Weight: 1.1000

OK Cancel Search...

- All items containing *binocular* are displayed in roughly alphabetical order. Scroll the list and select the Nikon 7x20 model.

The "Customer Service Lookup" dialog box shows details for the Nikon Travelite Binocular-7x20. The "Inventory" tab is selected.

ID: 5002 Nikon Travelite Binocular-7x20

Vendor: 2NDPHO

Vendor Item:

Product Class: BINOC Binoculars

On Hand: 122 Tax Exempt: ☐ Prepaid: ☐ Service Item: ☐ Closeout: ☐ Discontinued: ☐

Pickable: 122

Committed: 0

Available: 122

Allocated: 0

Drop Ship: Never

Bin: 3CD602 W/hs: DEFAULT Pickable: ☐ On Hand: 122 Allocated: 0

default Bin: 3CD602

On Order: 0

Delivery: //

Price Codes: Price: \$89.00

Code 1: \$89.00

Shipping Charge: \$0.00

Orders... Returns Item History Demographics P/O Calc Kit Select Inv Workorders



- Basic inventory information is shown. Press **[Alt]+T** to drill-down further.

The “Stock” tab displays (in read-only mode). The various tabs contain a wealth of detailed information about the item. Each is only a click away.

The screenshot shows a software window titled "Inventory Item - View Only". At the top, there are fields for "ID: 5002" and "Description: Nikon Travelite Binocular-7x20". Below these are several tabs: "Bin Locations", "Substitutes", "Aliases", "General", "Vendors", "Charges", "Stock" (which is selected), "Sales/Cost", "Web Info", "Text Prompts", "Configure Kit", and "Demographics". The "Stock" tab is divided into four main sections: "Current Stock Levels", "Re-Order Information", "Dimensions", and "Manufacturing".

Current Stock Levels	
On Hand:	122
Pickable:	122
Committed:	0
Available:	122
Allocated:	0
On Order:	0
Delivery:	//
Reserved:	0

Re-Order Information	
Purch Meas:	0
Purchase Unit:	
Order Qty:	0
Minimum:	0
Maximum:	0
Lead Time (days):	0
Avg Lead Time:	0
Last Lead Time:	0

Dimensions	
Unit Meas:	
Pack Meas:	0
Unit Weight:	0.0000
Length:	0.00
x Width:	0.00
x Height:	0.00
Cube:	0.00
Dim. Weight:	0

Manufacturing	
Allocated Mfg	0
Committed Mfg	0
Qty Being Mfg	0

At the bottom of the "Stock" tab, there is a "Warehouse Distribution" button and a "Receipts" section with fields for "MTD: 0", "YTD: 0", and "Adjustments: 0". A "Close" button is located at the bottom right of the window.



- Activating the General tab brings up the following panel:

The screenshot shows the 'Inventory Item - View Only' window. At the top, there are fields for 'ID: 5002' and 'Description: Nikon Travelite Binocular-7x20'. Below these are tabs for 'Bin Locations', 'Substitutes', and 'Aliases'. The 'General' tab is selected, showing various sub-tabs: 'General', 'Vendors', 'Charges', 'Stock', 'Sales/Cost', 'Web Info', 'Text Prompts', 'Configure Kit', and 'Demographics'. The 'General' sub-tab is active, displaying 'Product Class: BINOC' and 'Binoculars'. A list of attributes is shown with checkboxes: Serialized, Suppress FTC Notices, Tax Exempt, HazMat, Cust. Prepay, Slapper Item, Service Item, Special Order, Oversized, Custom, Closeout, Drop Ship (set to 'Never (N)'), Discontinued (Do Not Sell), Ship Alone, and Not For Retail Sale. To the right, there are fields for 'Country Origin: USA', 'OE Note', 'ISBN', 'ISSN', 'UPC' (with a barcode icon), and 'Message Formula' (with a search icon). A 'Close' button is at the bottom right.

By clicking on the Bin Locations tab, you can see where this item is located in the warehouse.

The screenshot shows the 'Inventory Item - View Only' window with the 'Bin Locations' tab selected. It displays a table of bin locations for item ID 5002. The table has columns: Bin ID >>, Whs, Pickable, Rank, Refill Level, Refill Qty, On Hand, and Allocated. The first row shows Bin ID 3CD602, Whs 1, Pickable checked, Rank 0.00, Refill Level 0, Refill Qty 0, On Hand 122, and Allocated 0. Below the table are fields for 'Description', 'Location', 'Type' (set to 'Primary Location'), 'Receiving Bin' (set to '3CD602'), and 'Always Ship this Item from Warehouse (optional)'.

Bin ID >>	Whs	Pickable	Rank	Refill Level	Refill Qty	On Hand	Allocated
3CD602	1	☒	0.00	0	0	122	0



Reporting

The trial-size package was set up to produce “life-like” reports. When running these reports, please keep in mind the sample orders range from 4/13/00 to 4/24/00.

Dozens of unique reports are included with *Response*. Two examples will demonstrate how easy it is to run them.

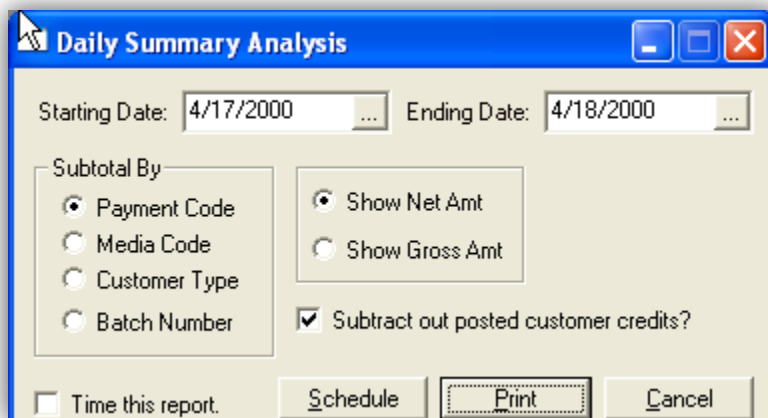
First we’ll run the **Daily Summary Analysis**. It summarizes daily order activity, deposits, charges, balances due, shipments, backorders, cancelled orders and returns. You may subtotal by payment code, media code, customer type or batch number—your choice – and you can show the net amount or the gross amount, again your choice. We’ll subtotal by media code showing the net amount here.

Next, we’ll look at the **Product Class Activity Report**. This report summarizes the sales of each product class, showing both current and year-to-date information.

Daily Enhanced Summary Report

Select: **Reports / Orders / Daily Order Reports / Daily Summary Analysis**

- Complete the screen as shown: Starting: 04/17/00, Ending: 04/18/00, Subtotal by **Media Code**, show **Net Amount**, Subtract out posted credits should be “checked.”



- Press the Print button [or **Alt**+P]

All reports are initially displayed to a handy “preview window.” Use this to view the report. From this point, you may output to a printer or choose one of several “Export” options that are available [see explanation under the Product Class Activity report].



Daily Summary Analysis (Preview)

1 of 1100%Total: 150100%150 of 150

Preview

Demo Company #1

Daily Summary Analysis

Reporting Period: 01/10/2011 thru 01/21/2011

Subtotaling by: Customer Type

Page: 1

Trans Date	Sub Code	Orders Received						Deposits		Balance Due	Shipments						COG	Back Orders	Cancelled Orders	Returned Orders
		Orders	Total	Average	Gross	Shipping	Tax	Check	Charge		Orders	Total	Average	Gross	Shipping	Tax				
1/10/11	CH3NR	2	220.00	110.00	200.00	20.00			220.00											
	DEALER	3	393.60	197.86	600.00	33.60			393.60											
1/10/11		5	613.60	162.72	800.00	20.00	33.60		613.60											
1/11/11	CH3NR									22	2,000.00	136.33	2,221.00	302.00	163.26	927.47				
	D									1	151.00	151.00	151.00			100.00				
	DEALER	6	605.60	134.26	700.00	45.60			605.60	6	678.40	113.06	680.00	38.40	410.00					
1/11/11		6	605.60	134.27	700.00	45.60			605.60	29	3,628.66	125.82	3,562.00	380.00	281.66	1,467.47				
1/13/11	CH3NR	2	220.00	110.00	200.00	20.00		10.00	200.00											
	DEALER	1	212.00	212.00	200.00	12.00		15.00	147.00											
1/13/11		3	432.00	144.00	400.00	20.00	12.00	25.00	347.00											

**** SEE THE SAMPLE REPORT OUTPUT ON THE NEXT PAGE.**

Daily Summary Analysis

Page: 1

Subtotaling by: Media Code

[illegible]

Daily Summary Analysis

Page: 1

Subtotaling by: Media Code

[illegible]

TRIAL SIZE

Daily Summary Analysis

12/1/00

Reporting Period: 04/17/2000 thru 04/18/2000

Page: 1

10:56AM

Subtotaling by: Media Code

Trans Date		Orders Received					Deposits		Balance		Shipments						Back	Cancelled	Returned
Sub Code	Orders	Total	Average	Gross	Shipping	Tax	Check	Charge	Due	Orders	Total	Average	Gross	Shipping	Tax	COG	Orders	Orders	Orders
SHRP04985	1	610.50	610.50	598.00	12.50				305.25								299.00		
4/18/00	67.00	16,148.08	241.02	14,911.45	435.50	821.08			2,427.86								2,275.00		
Grand Totals:	140	30,294.56	216.39	27,981.60	876.50	1,456.41			4,314.57	4	423.12	105.78	381.00	13.27	28.85	171.45	3,921.50	79.28	



Product Class Activity Report

Select: **Reports / Inventory / Sales / Product Class Activity**

No selections are necessary for this report, so it goes straight to the schedule, print, or cancel window. Select print to preview the report.

Response (TRIAL SIZE) - Build 3047

File Edit Orders Service Reports Add-Ons Window Help

Product Class Activity Report (Preview)

1 of 1+ 51% Total:3463

Preview

3/2/2004
12:12 PM

TRIAL SIZE
Product Class Activity Report

Page: 1

Product Class	Description	Units	Sales	Profit
BOOTS	Boots	40	\$3,511.50	\$1,931.30
BOOTS	Men's Boots	29	\$4,081.00	\$2,244.55
BOOTS	Women's Boots	12	\$1,818.00	\$999.90
CAMERA	Photographic Equipment	56	\$9,478.50	\$5,213.09
CRYON	Custom Bags	54	\$6,988.00	\$3,843.40
DRESS	Women's Dresses	0	\$0.00	\$0.00
DUFFEL	Duffel Bags	26	\$3,926.40	\$2,129.10
ETRVL	Eyeglasses, Travel Items	102	\$4,048.00	\$2,226.00
GLOVE	Gloves	0	\$0.00	\$0.00
GLOVE	Unisex Gloves	0	\$0.00	\$0.00
GROIN	Men's Groins	33	\$7,048.00	\$3,876.40
HATSW	Men's Hats	48	\$1,599.00	\$879.15
HATSW	Women's Hats	42	\$1,556.40	\$851.10
HEALTH	Health Care Products	150	\$4,943.10	\$2,704.95
INVENTORY	All Items	338	\$29,466.71	\$16,189.79
JACKS	Men's Jackets	68	\$10,632.00	\$5,847.60
JACKS	Women's Jackets	7	\$1,533.00	\$843.15
LUGACC	Luggage Accessories	12	\$270.00	\$148.50
MATER	Travel Books, Maps, & Tapes	41	\$1,984.60	\$1,078.11
NTRYL	Non-Eyeglass Travel Items	171	\$9,062.30	\$4,944.93
PANTSM	Men's Pants	0	\$0.00	\$0.00
PANTSM	Men's Pants	204	\$10,334.00	\$5,683.34
PANTSW	Women's Pants	151	\$7,965.20	\$4,358.49
PERSON	Small Bags	153	\$7,624.90	\$4,184.47
PULLOW	Men's Pillows	9	\$711.00	\$391.05
PULLOW	Women's Pillows	47	\$2,129.80	\$1,153.65
SANDM	Men's Sandals	42	\$2,700.55	\$1,481.94
SANDW	Women's Sandals	60	\$2,983.00	\$1,612.68
SECTM	Men's Socks	106	\$1,604.50	\$881.86
SHIRTW	Men's Shirts	221	\$11,890.73	\$6,532.58
SHIRTW	Women's Shirts	293	\$12,854.35	\$6,995.35

No Unread Mail RANDERSON 03/02/2004 View:

Notice the light-blue “envelope” with a red down arrow icon beside the Printer icon (on the toolbar above). Click it to see many “Export” options for file types (e.g. CSV, RPT, DIF, XLS, HTML, et. al.) and destinations (e.g. application, disk file, Lotus Notes, MAPI).

**** THE SAMPLE REPORT OUTPUT FOLLOWS ON THE NEXT PAGE.**

Inventory Data - Q3 2023											
Item ID	Item Name	Q3 2023 Performance				Q2 2023 Performance				Q1 2023 Performance	
		Units Sold	Revenue	Profit	Margin	Units Sold	Revenue	Profit	Margin	Units Sold	Revenue
BINOC	Binoculars	40	1.31%	\$3,511.50	1.78%	\$1,931.30	1.78%	40	1.31%	\$3,511.50	1.78%
BOOTSM	Men's Boots	29	0.95%	\$4,081.00	2.07%	\$2,244.55	2.07%	29	0.95%	\$4,081.00	2.07%
BOOTSW	Women's Boots	12	0.39%	\$1,818.00	0.92%	\$999.90	0.92%	12	0.39%	\$1,818.00	0.92%
CAMERA	Photographic Equipment	56	1.83%	\$9,478.50	4.80%	\$5,213.09	4.82%	56	1.83%	\$9,478.50	4.80%
CRYON	Carryon Bags	54	1.77%	\$6,988.00	3.54%	\$3,843.40	3.55%	54	1.77%	\$6,988.00	3.54%
DRESS	Women's Dresses	0	0.00%	\$0.00	0.00%	\$0.00	0.00%	0	0.00%	\$0.00	0.00%
DUFFEL	Duffel Bags	26	0.85%	\$3,926.40	1.99%	\$2,129.10	1.97%	26	0.85%	\$3,926.40	1.99%
ETRVL	Electric Travel Items	102	3.34%	\$4,048.00	2.05%	\$2,226.00	2.06%	102	3.34%	\$4,048.00	2.05%
GIFTCERTIF	Gift Certificates	0	0.00%	\$0.00	0.00%	\$0.00	0.00%	0	0.00%	\$0.00	0.00%
GLOVEU	Unisex Gloves	0	0.00%	\$0.00	0.00%	\$0.00	0.00%	0	0.00%	\$0.00	0.00%
GRMNT	Garment Bags	33	1.08%	\$7,048.00	3.57%	\$3,876.40	3.58%	33	1.08%	\$7,048.00	3.57%
HATSM	Men's Hats	48	1.57%	\$1,599.00	0.81%	\$879.15	0.81%	48	1.57%	\$1,599.00	0.81%
HATSW	Women's Hats	42	1.37%	\$1,550.40	0.79%	\$851.10	0.79%	42	1.37%	\$1,550.40	0.79%
HEALTH	Health Care Products	150	4.91%	\$4,943.10	2.50%	\$2,704.95	2.50%	150	4.91%	\$4,943.10	2.50%
INVENTORY	All Items	336	10.99%	\$29,379.30	14.88%	\$16,141.76	14.92%	336	10.99%	\$29,379.30	14.88%
JACKM	Men's Jackets	68	2.23%	\$10,632.00	5.38%	\$5,847.60	5.40%	68	2.23%	\$10,632.00	5.38%
JACKW	Women's Jackets	7	0.23%	\$1,533.00	0.78%	\$843.15	0.78%	7	0.23%	\$1,533.00	0.78%
LUGACC	Luggage Accessories	12	0.39%	\$270.00	0.14%	\$148.50	0.14%	12	0.39%	\$270.00	0.14%
MATER	Travel Books, Maps, & Tapes	41	1.34%	\$1,964.60	0.99%	\$1,078.11	1.00%	41	1.34%	\$1,964.60	0.99%

NTRVL	Non-Electric Travel Items	171	5.60%	\$9,062.30	4.59%	\$4,944.93	4.57%	171	5.60%	\$9,062.30	4.59%	\$4,944.93	4.57%
PAJAMM	Men's Pajamas	0	0.00%	\$0.00	0.00%	\$0.00	0.00%	0	0.00%	\$0.00	0.00%	\$0.00	0.00%
PANTSM	Men's Pants	204	6.68%	\$10,334.00	5.23%	\$5,683.34	5.25%	204	6.68%	\$10,334.00	5.23%	\$5,683.34	5.25%
PANTSW	Women's Pants	151	4.94%	\$7,965.20	4.03%	\$4,358.69	4.03%	151	4.94%	\$7,965.20	4.03%	\$4,358.69	4.03%
PERSON	Small Bags	153	5.01%	\$7,624.90	3.86%	\$4,184.47	3.87%	153	5.01%	\$7,624.90	3.86%	\$4,184.47	3.87%
PULLOM	Men's Pullovers	9	0.29%	\$711.00	0.36%	\$391.05	0.36%	9	0.29%	\$711.00	0.36%	\$391.05	0.36%
PULLOW	Women's Pullovers	47	1.54%	\$2,129.80	1.08%	\$1,153.65	1.07%	47	1.54%	\$2,129.80	1.08%	\$1,153.65	1.07%
SANDM	Men's Sandals	42	1.37%	\$2,700.55	1.37%	\$1,481.94	1.37%	42	1.37%	\$2,700.55	1.37%	\$1,481.94	1.37%
SANDW	Women's Sandals	60	1.96%	\$2,983.00	1.51%	\$1,612.68	1.49%	60	1.96%	\$2,983.00	1.51%	\$1,612.68	1.49%
SECUR	Security Products	106	3.47%	\$1,604.50	0.81%	\$881.86	0.81%	106	3.47%	\$1,604.50	0.81%	\$881.86	0.81%
SHIRTM	Men's Shirts	220	7.20%	\$11,834.80	5.99%	\$6,501.85	6.01%	220	7.20%	\$11,834.80	5.99%	\$6,501.85	6.01%
SHIRTW	Women's Shirts	293	9.59%	\$12,854.35	6.51%	\$6,995.35	6.46%	293	9.59%	\$12,854.35	6.51%	\$6,995.35	6.46%
SHOESM	Men's Shoes	27	0.88%	\$3,203.00	1.62%	\$1,761.65	1.63%	27	0.88%	\$3,203.00	1.62%	\$1,761.65	1.63%
SHOESW	Women's Shoes	59	1.93%	\$4,663.80	2.36%	\$2,525.85	2.33%	59	1.93%	\$4,663.80	2.36%	\$2,525.85	2.33%
SHORTM	Men's Shorts	89	2.91%	\$3,523.00	1.78%	\$1,937.65	1.79%	89	2.91%	\$3,523.00	1.78%	\$1,937.65	1.79%
SHORTW	Women's Shorts	69	2.26%	\$2,753.20	1.39%	\$1,505.80	1.39%	69	2.26%	\$2,753.20	1.39%	\$1,505.80	1.39%
SKIRTS	Women's Skirts	103	3.37%	\$6,147.20	3.11%	\$3,364.40	3.11%	103	3.37%	\$6,147.20	3.11%	\$3,364.40	3.11%
SOCKSM	Men's Socks	35	1.15%	\$290.25	0.15%	\$159.48	0.15%	35	1.15%	\$290.25	0.15%	\$159.48	0.15%
SOCKSW	Women's Socks	0	0.00%	\$0.00	0.00%	\$0.00	0.00%	0	0.00%	\$0.00	0.00%	\$0.00	0.00%
TRAVEL	Travel Products	1	0.03%	\$99.00	0.05%	\$31.72	0.03%	1	0.03%	\$99.00	0.05%	\$31.72	0.03%
TSHIRT	Unisex T-Shirts	0	0.00%	\$0.00	0.00%	\$0.00	0.00%	0	0.00%	\$0.00	0.00%	\$0.00	0.00%

UNDERM	Men's Underwear	18	0.59%	\$441.00	0.22%	\$242.35	0.22%	18	0.59%	\$441.00	0.22%	\$242.35	0.22%
VESTSU	Unisex Vests	58	1.90%	\$4,652.40	2.36%	\$2,530.20	2.34%	58	1.90%	\$4,652.40	2.36%	\$2,530.20	2.34%
VESTSW	Women's Vests	35	1.15%	\$2,215.00	1.12%	\$1,218.25	1.13%	35	1.15%	\$2,215.00	1.12%	\$1,218.25	1.13%
VIDEO	Video Equip. Accessories	18	0.59%	\$2,353.20	1.19%	\$1,281.30	1.18%	18	0.59%	\$2,353.20	1.19%	\$1,281.30	1.18%
WATCH	Watches	32	1.05%	\$4,566.50	2.31%	\$2,511.57	2.32%	32	1.05%	\$4,566.50	2.31%	\$2,511.57	2.32%
Grand Totals:		3,056		\$197,482.75		\$108,218.09		3,056		\$197,482.75		\$108,218.09	



In Conclusion

The more you use the trial-size system, the more you'll see how *Response* can help you manage and operate your business more effectively, more profitably and with greater ease and efficiency than ever before.

We truly appreciate your interest in our company and its products and would be delighted to submit a detailed software proposal for your consideration and review.

We'll work hard to earn your patronage, and even harder to keep it. Please help us to learn more about your company so we can determine if *Response* is a good fit for your requirements. If so, let us provide your direct commerce and fulfillment system—we won't disappoint you!

Yours sincerely,

The CoLinear Team