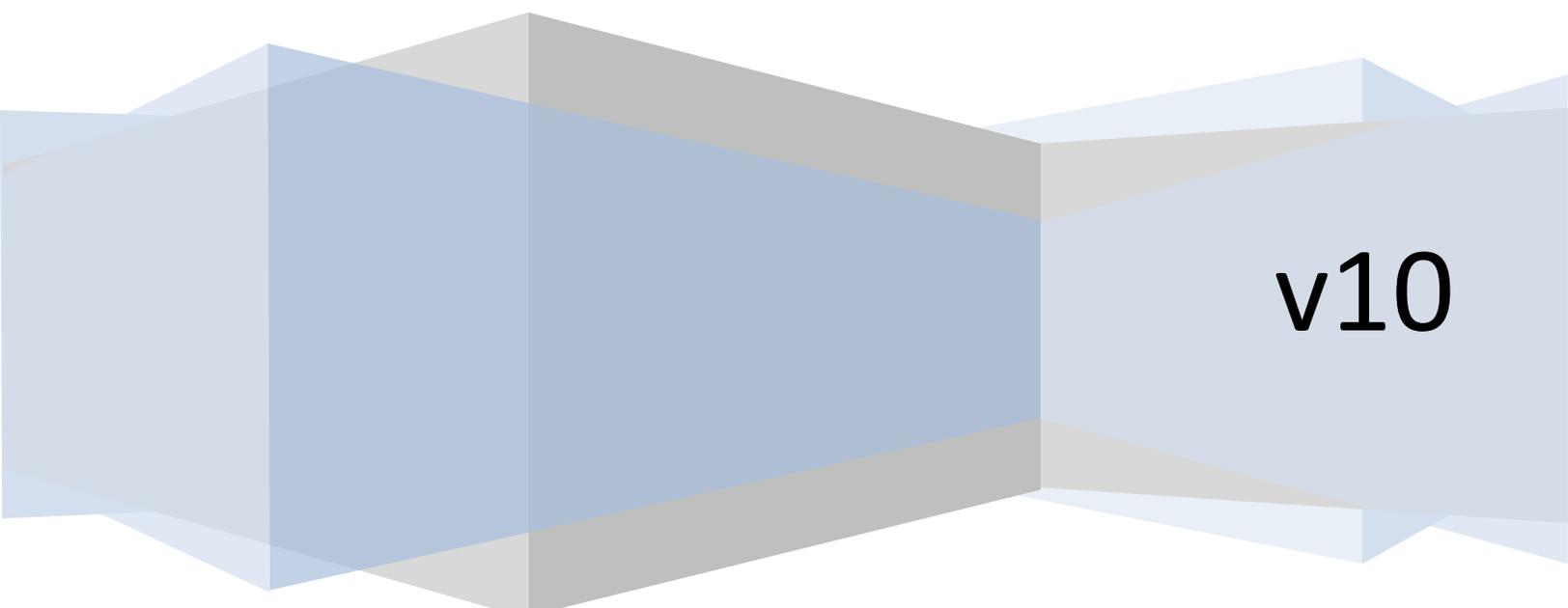




CoLinear Systems, Inc.

Multiple Divisions



v10



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Overview

Multiple Divisions (multi-div, multi-division) allows users to operate more than one “Company” within the same Response setup. Instead of having an entirely different Company setup, you will have one company differentiated by their Division. When using a multiple Division setup all of your inventory, customers, and orders will be shared across all divisions.

Multiple Companies (multi-co, multi-company) is for users to operate entirely separate Companies with a single installation of Response. Multi Company uses separate SQL databases to store and handle all the information per company. Multi-Company is like having several copies of Response installed, each of which manages a specific company. Only the Response programs themselves (and a few look up and configuration files) are shared in a multi-company environment. When you initially login to Response you will be given a choice to choose which Company you want to log into. In a multi company setup inventory, customers, and orders are not shared between companies.

Advantages to Multi Division

The advantage of multi-division is that the various workflow procedures need only be completed one time (i.e. authorizing credit cards or printing orders). A five-division system can authorize credit cards for all five divisions in a single pass.

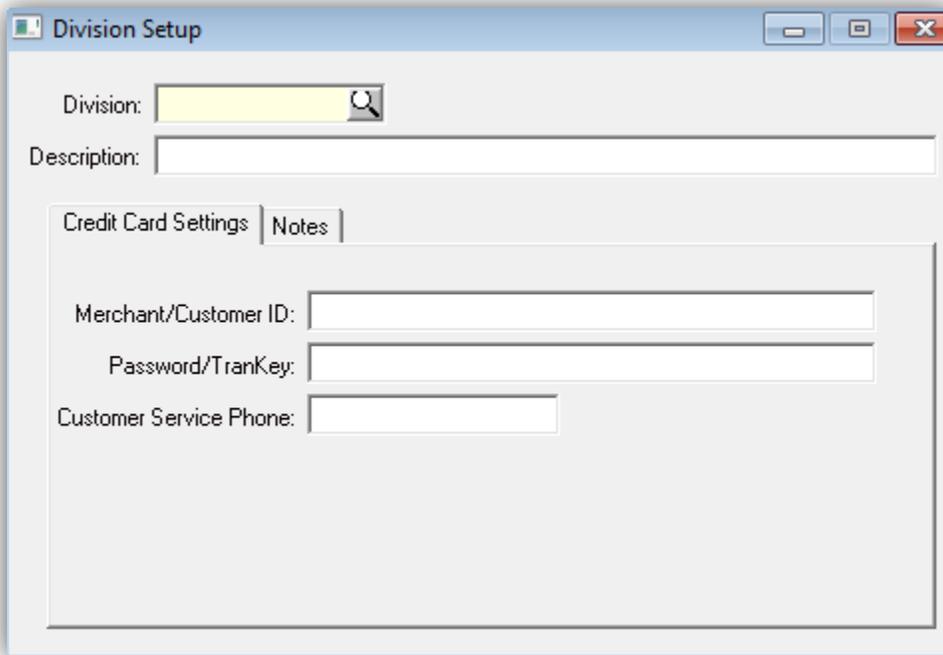
From an operational standpoint multi-division can be far more efficient and generally preferred. If uncertain about which scenario would best suit your organization, please contact support@colinear.com to discuss the specifics of your situation. If you choose multiple divisions, that feature will be activated for you via a password in company setup > installed options.



Division Setup

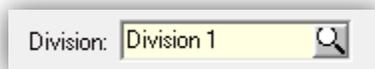
Menu Path:

Add-Ons / Multi-Division / Division Setup



Follow the steps below to setup a new Division

1. Enter in a Division ID



2. Enter in a Description for the Division





3. Enter in Credit Card Setting for this Division

The screenshot shows a web form with two tabs: "Credit Card Settings" and "Notes". The "Credit Card Settings" tab is active. It contains three input fields: "Merchant/Customer ID:" with the value "MerchantID", "Password/TranKey:" with the value "Password", and "Customer Service Phone:" with the value "1234567890".

- a. This is only necessary if you want to use a different Credit Card Merchant Account for this division. If no information is set here then Response will use the information stored in your Credit Card System file
- b. **Tech Note:** for Authorize.net users: (most likely this is the same for other CC processors too). We spoke with our authorize.net contact who says that unfortunately it's not possible to have multiple Merchant IDs through one gateway account. So you will need to create multiple authorize.net accounts for each division if you need the division name to show on your customers credit card statement. If you need only one merchant ID for all divisions then you should be fine with the information stored in your current Credit Card System File.

4. Enter any additional notes you need about the division on the notes tab.

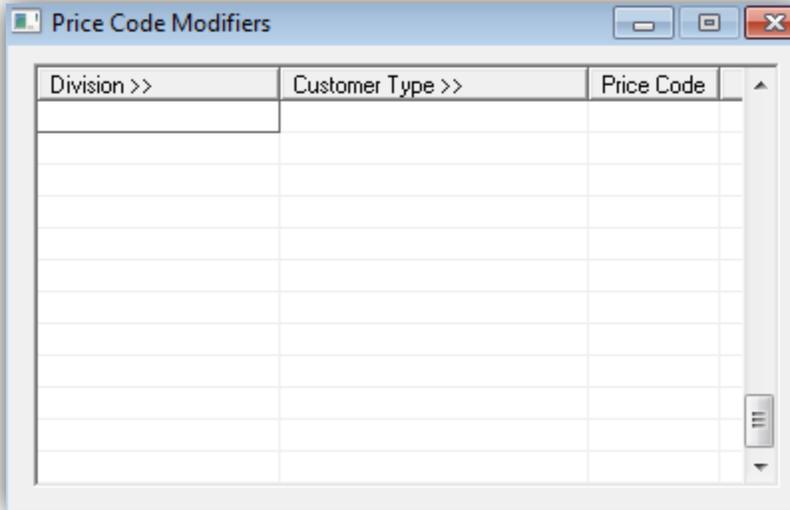
The screenshot shows the "Notes" tab of the "Credit Card Settings" form. The tab is active and contains a text area with a yellow background. The text inside the text area reads: "New Store Division Notes. Place anything important about the Division here!".



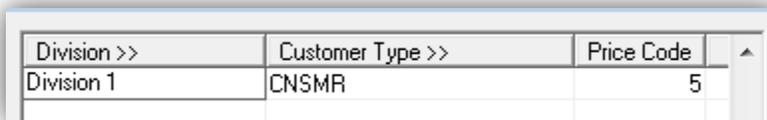
Division Price Code Modifiers

Menu Path:

Add-Ons / Multi-Division / Division Price Code Modifiers



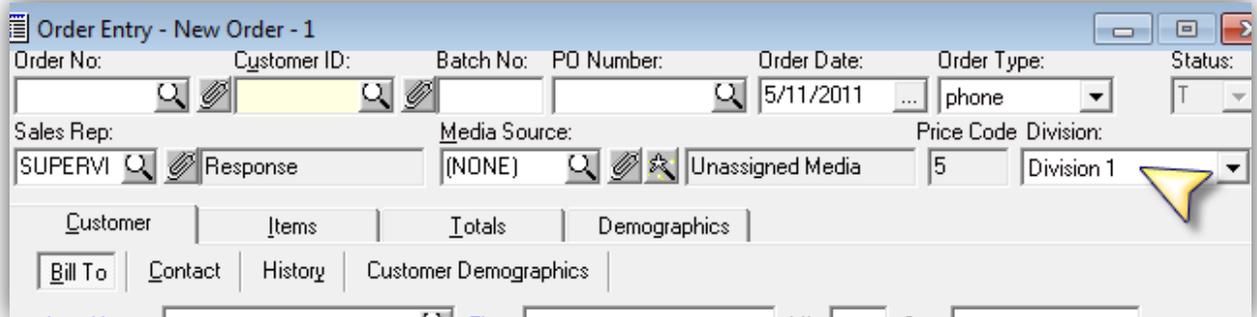
The Division and Customer type can optionally drive the price code used to determine pricing for the customer. For example, the CNSMR price code is normally pointing to price code 1 for inventory items. You could specify, as above, that CNSMR for the “DIVISION 1” division use price code 5. This way you can have the same product for different prices for different divisions.





Division Selection Throughout Response

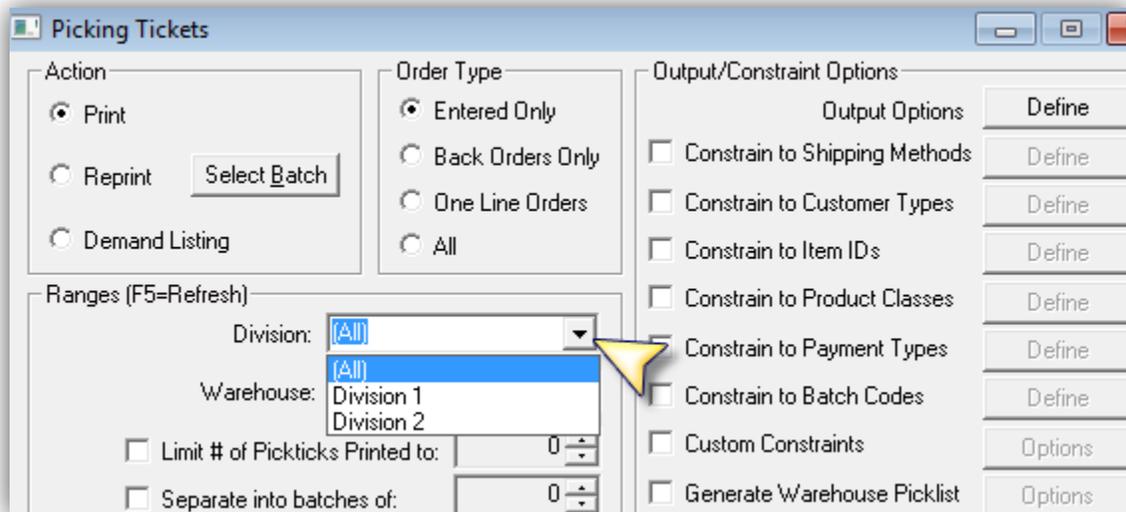
❖ Order Entry (OE)



During OE be sure to select the correct division before you AUTHORIZE, since different divisions usually have a different merchant ID. The Division that populates will be your first division ID alphabetically. There currently isn't a way in Response to "default" to anything else (5106). Here is a user tip:

- ◆ *We have a division set up called "AA" which is the default if you don't put anything in because it's first in the list. If you try to authorize this it will give you an error because no merchant ID is associated to it. Then they know to change it. We have all different websites calling into the same people so a "default" Division ID by rep wouldn't help.*

❖ Picking Tickets (Optional)





❖ Media Code Creation

Promo Code Description

Key Code List Code Contents Code

Cost / Qty Mailed | Response | Sales | MyView

Active?

Division:

- Division 1
- Division 2

Cost Per Piece
Qty Mailed:
Cost/Piece:

Retention Other

❖ Daily Summary Analysis Report

Starting Date: Ending Date:

Subtotal By
 Payment Code
 Media Code
 Customer Type
 Batch Number
 Order Type

Show Net Amt
 Show Gross Amt

Division:

Subtract out posted customer credits?

Time this report.

❖ Customer Orders (Division column added to right)

307367 Company:

Tester First: Billy M: T

Number	Order Date	Requested	Order Total	Balance D...	PO Number	Items	Status	Division
101915	5/9/2011	5/9/2011	\$60.37	\$60.37		1	B	Division 1
101914	5/4/2011	5/4/2011	\$145.17	\$145.17		2	W	Division 1
101913	5/4/2011	5/4/2011	\$431.37	\$431.37		2	W	Division 1
101912	5/4/2011	5/4/2011	\$7.37	\$7.37		0	E	Division 1
101911	5/4/2011	5/4/2011	\$555.56	\$555.56		5	E	Division 1
101909	5/3/2011	5/3/2011	\$347.05	\$347.05		1	S	Division 1
101907	5/3/2011	5/3/2011	\$318.00	\$318.00		1	E	Division 1
101891	4/21/2011	4/30/2011	\$347.05	\$347.05		1	S	Division 1
101890	4/21/2011	4/21/2011	\$188.21	\$188.21		2	S	Division 1



- ❖ Customer Shipments (Division column added to right)

307367 Company: []

Tester First: Billy M: T

Showing: 30 Days

	Confirm	Trans ID	Ordered	From W/hs	Auth'd	Shipped	Charged	Pay	Amount	S	R	Division
11909	5/4/2011	101615	5/3/2011	DEFAULT		5/4/2011		PC	\$347.05	E		Division 1
11891	5/4/2011	101612	4/21/2011	DEFAULT		5/4/2011		PC	\$347.05	E		Division 1
11890	5/4/2011	101611	4/21/2011	DEFAULT		5/4/2011		PC	\$188.21	E		Division 1
11889	5/4/2011	101610	4/21/2011	DEFAULT		5/4/2011		VI	\$71.67	E		Division 1
11888	5/4/2011	101609	4/21/2011	DEFAULT		5/4/2011		PC	\$169.60	E		Division 1
11886	4/21/2011	101580	4/21/2011	DEFAULT		4/21/2011		PC	\$318.00	E		Division 1

- ❖ Order Import (can specify in defaults OR import)

Import Files | **Defaults** | Other Defaults

Import File: K:\workr4w\NIC\ [Add]

[Remove] [Remove All]

Import File Definition: K:\workr4w\NIC\xcartstdtab-cvv.imo [Edit/Create]

Enter the Batch ID to be assigned to these orders: NIC Order Source: web

Print Import Log For Division: []

Last Imported File: K:\workr4w\NIC\orc []

[]

Division 1
Division 2

- ❖ Import Prospects (can specify in defaults OR import)

Import Files | **Defaults** | Other Defaults

Entry Date: 5/11/2011 [] Division: []

Salesman: (NONE) [] Unassigned Salesman []

Prospect Type: 4YCOLL [] College Students []

Original Media: (NONE) [] Unassigned Media []

[]

Division 1
Division 2

- ❖ Customer/Prospect Entry (see division preferences for Customers/Prospects below)



- ❖ Batch Credit Card Authorizations (optional)
- ❖ Counter Sales (set with flag option, see below)



Division Mailing Preferences for Customers/Prospects

In the Misc tab for Customer Entry, set division specific mailing preferences for a customer.

The screenshot shows a customer entry form with the following fields and sections:

- ID: 307367, Last/First: Tester Billy
- Tabs: Quotes, Shipping Addresses, Continuity Memberships, Contact Mgmt., General, Administrative, **Misc**, Purchases, History, Demographics, Standing Orders, Special Pricing, MyView
- Discount: 0.0000, A/R Credit Limit: \$0.00, Credit Level: 5
- Date of Birth: //, SSN: - - -, Tax Exempt: Tax Exempt, Tax ID:
- Email: Primary: billytester@colinear.com, Secondary:
- Division-specific mail preferences table:

Division	Description	Active
Division 1	Test Division 1	Y
Division 2	Test Division 2	N

A yellow arrow points to the 'Division Preferences' button next to the table.

All divisions will be available for selection in the “division-specific mail preferences” section of the customer entry screen. When a customer has ordered from a division OR when you select and set division preferences for a customer, the “Active” column becomes “Y”, indicating that customer has activity in the associated division.

Division	Description	Active
Division 1	Test Division 1	Y
Division 2	Test Division 2	N

Follow the steps below to change mailing preferences for a specific division



1. Highlight the Division you wish to edit mailing preferences for
2. Press then Division Preferences button to bring up the mailing preferences for that customer for that division
3. Check or uncheck any necessary preferences
4. Click OK to save the changes

Customer: 307367
Division: Division 1

Okay To:

- Mail
- Rent Mailing Address
- Rent Email Address
- Phone
- Fax
- Send Order Status Emails
- Send Promotional Emails
- Prefers HTML Email

OK Cancel

Mailing Preferences for Prospects

Mailing preferences for prospects work the exact same as customers. Follow the exact same steps listed above to modify mailing preferences for a prospect. The only difference is you will need to open to prospects view to modify prospect data (File / Prospects / Prospects).



Division Settings for Counter Sales

This setting can ultimately affect price code used with division price code modifiers.

The screenshot shows the 'Miscellaneous' settings tab. The top section contains several checkboxes, with 'Do not confirm saves in views' and 'Do not automatically genderize names' checked. The bottom section is a table of settings:

Flag	Value
Retain Temporary "T" status orders for this many days. [TOrderDays.flg]	5
Location for Response Mail Merge documents. [MailMergeDirectory.fil]	c:\ResponseMM
Default SPE for Item Verification. [VERIFYSPES.fil]	
Division to use for Counter Sales [POSDIVISION.fil]	Division 1
Batch Code to use for Counter Sales [POSBATCHCODE.fil]	CS
Don't print checks for orders in these statuses. [nocheckstatus.fil]	H
Expression used to display CUSTOMER calls in PBX Interface [PBXCUSTOMEREXP.fil]	



Database Tables used with Multi Division Setups

Table #303: DIVISION

DIVISION	Division ID
DIVISION_DESC	Division Description
MERCHANT_ID	CC Merchant Account ID
MERCHANT_PASS	CC Merchant Account Password
NOTES	Notes about the Division

Table #311: DIVPRICE

DIVISION	Division ID
CUST_TYPE_ID	Customer Type ID
PRICE_CODE	Price Code for the customer Type for that Division

Table #304: CUSTDIV

CUSTOMER_ID	SYSCUST Customer ID
DIVISION	Division ID
MAIL_FLAG	Customer ok to Mail Flag (Y or N)
OK_PHONE	Customer ok to Call Flag (Y or N)
OK_FAX	Customer OK to Fax Flag (Y or N)
OK_STATUS_EMAIL	Customer Ok to send Status Emails Flag (Y or N)
OK_PROMO_EMAIL	Customer Ok to send Promotional Emails Flag (Y or N)
OK_RENT_EMAIL	Customer OK to Rent out Email Address Flag (Y or N)
OK_RENT_MAIL	Customer OK to Rent Mailing Address Flag (Y or N)
PREFER_HTML	Customer Prefers HTML Email (Y or N)

Table #307: PROSDIV

PROSPECT_ID	MASTPROS Prospect ID
DIVISION	Division ID
MAIL_FLAG	Prospect ok to Mail Flag (Y or N)
OK_PHONE	Prospect ok to Call Flag (Y or N)
OK_FAX	Prospect OK to Fax Flag (Y or N)
OK_STATUS_EMAIL	Prospect Ok to send Status Emails Flag (Y or N)
OK_PROMO_EMAIL	Prospect Ok to send Promotional Emails Flag (Y or N)
OK_RENT_EMAIL	Prospect OK to Rent out Email Address Flag (Y or N)
OK_RENT_MAIL	Prospect OK to Rent Mailing Address Flag (Y or N)
PREFER_HTML	Prospect Prefers HTML Email (Y or N)

Table #2: SYSOENT

Added DIVISION	Division field to specify Division for Order
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Table #140:
OSHIPTRN

Added DIVISION	Division Field to specify Division for Order Shipment
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Table #60: MASMEDIA

Added DIVISION	Division Field to specify which division the media code can apply to
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Document Modification History

- ❖ 10/04/2006: Document Created
- ❖ 11/01/2006: Format changes
- ❖ 01/05/2007: added tech notes for the curious on page 1
- ❖ 04/27/2007: page 2, tech note regarding merchant id's per division
- ❖ 08/06/2008: unknown
- ❖ 04/14/2009: pg 1-2 mention of ctypemerch.fil
- ❖ 05/12/2011: JLee: Document recreated (Old Doc – MultipleDivisions.doc)
- ❖ 5/16/2011: review/ge
- ❖ 8/15/2011: pg 6, added tip for default Division ID