

# CONTENTS

## 11 CUSTOMER ENQUIRY

### A

Address Details .....	18
-----------------------	----

### C

Customer Details .....	19
Customer Display Bill .....	8
Customer Enquiry Menu.....	5
Customer Messages .....	21
Customer Payment.....	7

### D

Delivery History .....	10
Delivery Note Selection.....	20

### F

Forward Temporary Changes .....	13
---------------------------------	----

### G

Get Customer Screen .....	3
---------------------------	---

### H

Hampers .....	15
Holidays .....	14

### N

Non Weekly Standing Orders.....	12
---------------------------------	----

### P

Payment History.....	9
----------------------	---

**S**

Standing Orders.....11

**V**

View Orders .....6

## Menu Map 1

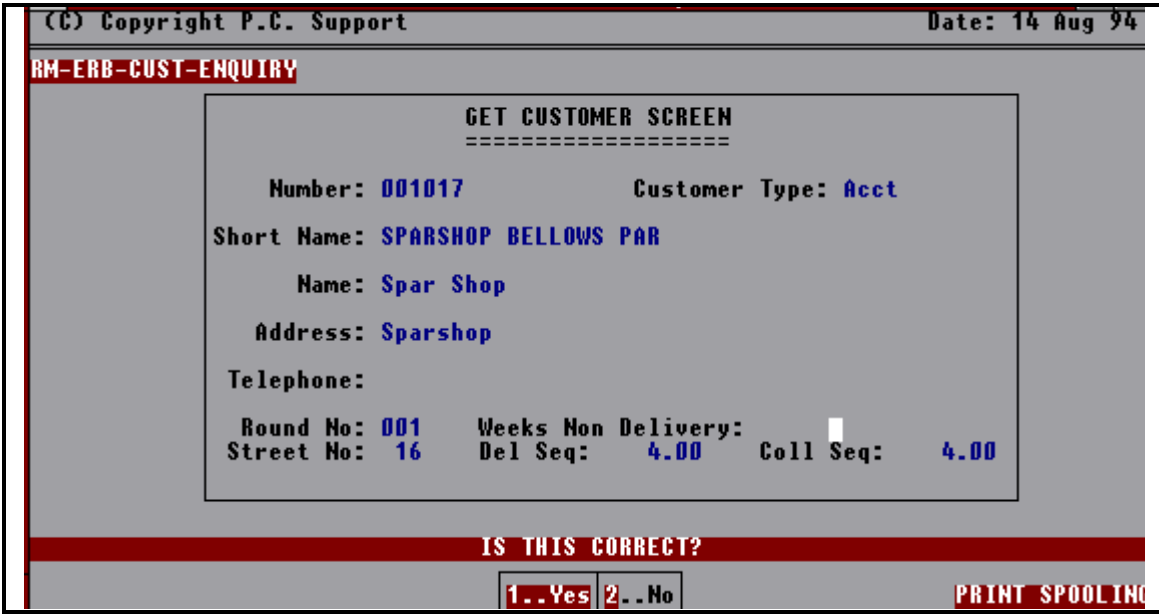
```
(C) Copyright P.C. Support                               Date: 14 Aug 94
RM-ERB-CUST-ENQUIRY
GET CUSTOMER SCREEN
=====
Number: [REDACTED] Customer Type:
Short Name: [↑]
Name:
Address:
Telephone:
Round No: Weeks Non Delivery: [ ]
Street No: Del Seq: Coll Seq:
ENTER CUSTOMER NUMBER OR / TO SEARCH, <ESC> TO EXIT
PRINT SPOOLING
```

This is the Get Customer screen which you will find at all places in Roundsman where you need to call up a customers information.

You may search for a customer by entering the customer number, if you know it, you can enter / in the customer number and a full list of customers on your system will be displayed in customer number order. If you know the short name, then you can leave the number blank and enter the short name into the short name field, this will bring up any customers that may have the same short name, if you have more than one then you will be asked to confirm that the customer displayed is the correct one or hit the space bar for the next matching customer.

If you know the customers house number but not the name of the street then you can enter in the short name field a / plus the number, press return and a list of customers with the same house number will be presented to you. If you are using names as short names then enter / with two or three characters of the short name and you will have a list of customers that have those characters in the first positions displayed to you.

You can scroll up and down the list to select the customer press return when you have selected the required customer, that customers information will be displayed.



You are now asked to confirm that the customer selected is the correct customer, the screen shows the number, short name, name and address, the number of weeks that the customer has had no deliveries is displayed, this is calculated by the week end routine.

The round that the customer is on, the street number of the street that the customer is in, and the delivery and collection position within that street.

The type of customer is also displayed.

If you are using customer credit limits, and the customer is over your limit then a flashing O will be displayed.

## Menu Path 1

```
<C> Copyright P.C. Support                               Date: 14 Aug 94
RM-ERB-CUST-ENQUIRY
Customer No: 001017   Customer Name: SPARSHOP BELLOWS PAR
Select:-
1 ... Current Orders
2 ... Enter Payment
3 ... Customer Bill
4 ... Customer History
5 ... Standing Orders
6 ... Future Temp.
7 ... Holidays
8 ... Hampers
9 ... Customer Details
X-Select Another Customer
USE CURSOR KEYS ↑ ↓ TO SELECT, THEN PRESS <RETURN>
PRINT SPOOLING
```

From this screen you can do anything that may be required to be done to this particular customer.

Option 1 will allow you to view or print the customers orders as they are at this moment in time.

Option 2 will enable you to make a payment to this customer.

Option 3 will enable you to display or print the bill for this customer, if the customer is a weekly one, then bill type 5 will be used, if fortnightly or monthly then you can choose bill type 7 or 8, if an account customer then you can choose bill type 9 or 10.

Option 4 enables you to display or print the customers payment history and/or delivery history.

Option 5 will enable you to change the customers standing order, either weekly or non-weekly, or put new products on their standing order.

Option 6 enables you to deal with a temporary change for a future week, this is a one off order for a product for just that week.

Option 7 enables you to deal with a customers holiday, or to suspend the customer.

Option 8 enables you to maintain the customers hampers, up to 4 hampers per customer can be held.

Option 9 enables you to change all the details that relate to this customer, you will not be able to change the street, or the round that the customer is on, or the delivery/collection sequence, these options are covered at a later stage.

## Menu Path 1,1

<C> Copyright P.C. Support										Date: 14 Aug 94		
RM-ERB-CUST-ENQUIRY												
Number:		001017		Name:		SPARSHOP BELLOWS PAR						
Type	Product	SUN	MON	TUE	WED	THU	FRI	SAT				
S/O	27 Sep 92	00001	PAST PINTS	0.00	2.00	2.00	2.00	2.00	2.00	2.00	4.00	
S/O	27 Sep 92	00002	SEMI PINTS	0.00	3.00	3.00	3.00	3.00	3.00	3.00	6.00	
S/O	27 Sep 92	00003	SKIM PINTS	0.00	2.00	2.00	2.00	2.00	2.00	2.00	4.00	
S/O	18 Oct 92	00009	PAST PERGA	0.00	1.00	1.00	1.00	1.00	1.00	1.00	2.00	
T/C	21 Aug 94	00001	PAST PINTS	0.00	2.00	2.00	2.00	2.00	2.00	2.00	4.00	
T/C	21 Aug 94	00002	SEMI PINTS	0.00	3.00	3.00	3.00	3.00	3.00	3.00	6.00	

PRESS SPACE TO CONTINUE PRINT SPOOLING

Customer Enquiry Option 1. This option allows you to 1 View the selected customers current order or 2 Print the current order.

This is a display of the Order screen which shows that this customer has two items on Standing Order denoted by the SO at the beginning of the line. A temporary change is noted with TC, a forward permanent change as PC and a non-weekly order NW. The dates refer to the date that the order comes into operation. With the Standing Order then the date refers to the date that the order started.

## Menu Path 1,2

```
<C> Copyright P.C. Support                               Date: 14 Aug 94
RM-ERB-CUST-ENQUIRY
Customer No: 001017   Customer Name: SPARSHOP BELLOWS PAR
ACCOUNT CUSTOMER PAYMENTS
=====
Last Payment Date    14 Aug 94
Last Payment Amount  50.00
Balance B/F          60.54
Payment              60.54
Discount             f 0.00
New Balance          0.00
PLEASE ENTER PAYMENT AMOUNT
PRINT SPOOLING
```

Option 2 from the customer Enquiry menu, allows a payment to be entered against this customer. The above screen is based on the account customer payment. The retail customer screen and routine is the same apart from discounts which do not apply to retail customers.

The screen displays the date of last payment, the amount of last payment, any balance that was due from a previous week, the value of the current weeks bill, the default on entry is the total due. If you return to this amount then the customer has paid that amount, you need to enter the amount should it differ. Once payment is made then the new balance is displayed.

If you are using staggered rounds then the payment displayed will be the Roundsman week end total, not the customer week end.

## Menu Path 1,3

Customer Number: 001017		Short Name: SPARSHOP BELLOWS PAR								
Product	SUN	MON	TUE	WED	THU	FRI	SAT	TOTAL	PRICE	VALUE
PAST PINTS		2	2	2	2	2	4	14.00	0.3200	4.48
SEMI PINTS		3	3	3	3	3	6	21.00	0.3200	6.72
SKIM PINTS		2	2	2	2	2	4	14.00	0.3200	4.48
PAST PERGAL 5 GA		1	1	1	1	1	2	7.00	2.0000	14.00
TOTAL THIS WEEK:										29.68
HAMPER AMOUNT:										
BROUGHT FORWARD:										60.54
TOTAL OWING:										90.22

Select Option Required From The Choice Below.

PRESS SPACE TO CONTINUE PRINT SPOOLING

Option 3 from the customer inquiry menu allows you to display the current weeks bill, or to print the bill.

This is a display of the current weeks bill. It shows the deliveries to the end of the current week taking into account any changes that may already have been entered for this week. If you are using staggered rounds then this bill will show the customers week not the Roundsman week.

## Menu Path 1,4,1

<C> Copyright P.C. Support		Date: 14 Aug 94	
<b>RM-ERB-CUST-ENQUIRY</b>			
Customer Payment History From		22 May 94	
Customer Number:	001017	Name:	SPARSHOP BELLOWS PAR
		Debit	Credit
OUTSTANDING BALANCE:		90.22	
Payment	14 Aug 94		50.00
Bill W/C	14 Aug 94	29.68	
Bill W/C	07 Aug 94	35.14	
Bill W/C	31 Jul 94	35.14	
Bill W/C	24 Jul 94	30.12	
Bill W/C	17 Jul 94	35.14	
Bill W/C	10 Jul 94	35.14	
Bill W/C	03 Jul 94	35.14	
Bill W/C	26 Jun 94		
Bill W/C	19 Jun 94		
		1..Next Screen 2..Exit	
		PRINT SPOOLING	

Option 4 from the Customer Enquiry screen allows the viewing or printing of the selected customers payment and delivery history for the period set when the system was installed.

The above screen displays the customers outstanding balance plus the bills that were produced weekly and any payments that have been made.

If you have more weeks history than will fit on one screen then you will be given the option of displaying the next screen which will show as a balance brought and balance at the start of the history period or for when the customer started, if that is since the end of the history period.

## Menu Path 1,4,3

<C> Copyright P.C. Support Date: 14 Aug 94

**RM-ERB-CUST-ENQUIRY**

Customer No: 001017 Customer Name: SPARSHOP BELLOWS PAR  
Customer Delivery History From 22 May 94

W/Com	Product	SUN	MON	TUE	WED	THU	FRI	SAT
07 Aug 94	00001 PAST PINTS	0.00	2.00	2.00	2.00	2.00	2.00	4.00
07 Aug 94	00002 SEMI PINTS	0.00	3.00	3.00	3.00	3.00	3.00	6.00
07 Aug 94	00003 SKIM PINTS	0.00	2.00	2.00	2.00	2.00	2.00	4.00
07 Aug 94	00009 PAST PERGA	0.00	1.00	1.00	1.00	1.00	1.00	2.00
31 Jul 94	00001 PAST PINTS	0.00	2.00	2.00	2.00	2.00	2.00	4.00
31 Jul 94	00002 SEMI PINTS	0.00	3.00	3.00	3.00	3.00	3.00	6.00
31 Jul 94	00003 SKIM PINTS	0.00	2.00	2.00	2.00	2.00	2.00	4.00
31 Jul 94	00009 PAST PERGA	0.00	1.00	1.00	1.00	1.00	1.00	2.00
24 Jul 94	00001 PAST PINTS	0.00	2.00	0.00	2.00	2.00	2.00	4.00
24 Jul 94	00002 SEMI PINTS	0.00	3.00	0.00	3.00	3.00	3.00	6.00
24 Jul 94	00003 SKIM PINTS	0.00	2.00	0.00	2.00	2.00	2.00	4.00
24 Jul 94	00009 PAST PERGA	0.00	1.00	0.00	1.00	1.00	1.00	2.00

1..Next Screen 2..Exit PRINT SPOOLING

This is a display of the delivery history showing the week commencing date, the product number and short description plus the daily deliveries for the number of weeks that history has been set up for.

You will be prompted for the next screen if there is more than one screen full of data.

## Menu Path 1,5,1

RM-STANDING-ORDERS								
Number: 001017								
Name: SPARSHOP BELLOWS PAR								
Product	Price	SUN	MON	TUE	WED	THU	FRI	SAT
00001 PAST PINTS	1		2	2	2	2	2	4
00002 SEMI PINTS	1		3	3	3	3	3	6
00003 SKIM PINTS	1		2	2	2	2	2	4
00009 PAST PERGA	1		1	1	1	1	1	2

PLEASE ENTER OPTION:

1.Amend 2.New Item 3.Delete Item 4.View Future 5.Save Changes 6.Exit **OLING**

Option 5 from the Customer Enquiry screen allows the entry of new standing orders whether they are weekly or non-weekly.

This screen displays the current standing orders. You may now amend any of the current orders, enter new products onto the standing order or delete an item from the standing order. Any orders that are due to start in the future will be marked with an asterisk, the view future option will allow you to view and change this future permanent change. When all changes have been made then you will save the changes. You will be given the option to save for a future week or the current week. If you save for the current week you can then select the day on which you wish the order to start this week.

If you select the first day of the week then the system will bring the standing order into operation from the current weeks start date. If saved from a day during the week then the standing order will start from the start of next week, and temporary changes will be written for this week.

## Menu Path 1,5,2

```
<C> Copyright P.C. Support                               Date: 14 Aug 94
RM-NON-WEEKLY-SO
NON-WEEKLY STANDING ORDERS
=====
Customer Number:001017      Customer Name:  SPARSHOP BELLOWS PAR
Product Code:              Product Description:
Price Code:                Type of Order:
Start Date:                Week Commencing:

PLEASE ENTER OPTION:
1..Enter 2..Amend 3..Delete                                PRINT SPOOLING
```

This screen shows the entry of a Non-Weekly standing order. By non-weekly we mean that it will be an order that happens either every so many weeks, monthly, bi-monthly, quarterly, half-yearly or yearly. Enter the product code, confirm the price code, enter the start date, you will then be given the week commencing date. Enter the type of order as per the prompts on the screen, W = weekly, M = monthly, B = bi-monthly, Q = quarterly, H = half-yearly and Y = yearly. When you enter W you will be prompted for the number of weeks in the cycle which can be any number. The final thing to set this order up is to enter the quantity required. If you have rounds that deliver on staggered days then the customer can have two non-weekly standing orders set to cover the delivery days of a two week period.

## Menu Map 1,6

```
<C> Copyright P.C. Support                               Date: 14 Aug 94
RM-TEMPORY-CHANGES
Number          001017      Name    SPARSHOP BELLOWS PAR
Product
W/C Date
Price Code      Price
SUN            MON        TUE        WED        THU        FRI        SAT
-----
S/O
T/C            0.00        0.00        0.00        0.00        0.00        0.00        0.00

PLEASE ENTER OPTION:
1..Enter 2..Amend 3..Delete          PRINT SPOOLING
```

Option 6 allows you to enter a temporary change for a future week. You can enter a new product, amend a product that has already been entered or delete a product that is on the list. You key the product number, then the week commencing date of the week in which you want the delivery to take place, confirm the price code, then enter the delivery quantity. This order is for delivery in this week only, when the week has ended the order will be deleted.

## Menu Map 1,7

```
<C> Copyright P.C. Support                               Date: 14 Aug 94
RM-HOLIDAYS
Number:          CUSTOMER
001017          001017
Name:           SPARSHOP BELLOWS PAR
HOLIDAY DATES
START DATE : 140894          END DATE :
↑
ROUNDSBOOK MESSAGE :
EXISTING HOLIDAYS
Start Date      End Date      Entered Date      Suspended
Enter Holiday Dates
PRINT SPOOLING
```

Option 7 allows the entry of holidays and suspensions. For a holiday you enter the start date then the end date, these dates are inclusive of non-delivery days. After accepting the dates you will get the option of changing the default message that will be passed to the Roundsbook, this message will then be printed in the Roundsbook when the holiday comes into operation.

The next option covers the suspension of all items. This facility allows for the order to be cancelled, but you can leave an item for delivery even if you are away. Temporary changes are then created for the next 2 weeks, the end of week routine will enter temporary changes up to the end of the holiday.

If you leave the end date blank then you will put the customer on suspension, the default message will be posted to the Roundsbook message and all products will be suspended

If you need to change a holiday or end a suspension, enter the start date of the holiday, the dates are shown in the bottom window, you will be given a warning that there is a holiday in operation. You can amend, cancel or leave the holiday as is. If you cancel, all orders are returned to their basic from the beginning of the current week. If you wish to change the holiday then enter the date that corresponds with the last non delivery day and after confirmation the necessary changes to the orders are placed.

## Menu Map 1,8

```
(C) Copyright P.C. Support                               Date: 14 Aug 94
RM-ERB-CUST-ENQUIRY
Customer No: 001017   Customer Name: SPARSHOP BELLOWS PAR
Select:-
Select:-
1 ... Add/Amend Hamper Details
2 ... Cancel & Repay Customer
3 ... Cancel A Hamper Installment
4 ... Increase A Hamper Installment
X ... Exit
9 ... Customer Details
X>Select Another Customer
USE CURSOR KEYS ↑ ↓ TO SELECT, THEN PRESS <RETURN>
PRINT SPOOLING
```

Option 8 allows the entry of hampers. You have the options to add or amend a hamper, to cancel and repay the customer, to cancel a single installment or to increase an installment.

Option 1 is to add or amend a hamper. You can have up to 4 hampers per customer. To enter a hamper you enter the date that the hamper is ordered, then the date that it will be delivered, the end week commencing date is then given to you. Enter the product code the description is then shown, enter the quantity, the hamper value will then be displayed along with the total value due, if the customer has already paid some money towards the hamper value then this entered as the amount paid to date, the balance is then calculated and the weekly amount is calculated to the end week. This shows the weekly payment needed to pay the hamper off by the delivery week.

Option 2 cancel and repay. It must be remembered that the amount that a customer pays for the hamper is held as a separate amount, so you will always be able to see how much a customer has paid towards the hamper. If you cancel and repay you are in fact canceling the hamper and paying back all of the money paid so far, this will automatically be credited to the milk bill.

Option 3 cancel a hamper installment, allows you to cancel a single payment, you can also choose to recalculate the payments needed to cover the cost of the hamper by delivery date.

Option 4 increase a hamper installment, allows you to increase a hamper installment, also recalculating the weekly payments due.

## Menu Map 1, 8, 1

<C> Copyright P.C. Support		Date: 14 Aug 94		
<b>RM-HAMPER-DETAILS</b>				
Customer No: 001004	Customer Name: 26 Victoria Road	Date: 14 Aug 94		
	Hamper 1	Hamper 2	Hamper 3	Hamper 4
Start Date				
End Date	f			
End W/C Date				
Product Code				
Description				
Quantity				
Hamper Value				
Total Value Due				
Amount Paid to Date				
Balance Due				
Weekly Amount				
<b>ENTER HAMPER DETAILS</b>				<b>PRINT SPOOLING</b>

Up to 4 hampers can be setup for each retail customer. Hampers cannot be allocated to Account customers.

## Menu Map 1,9

```
<C> Copyright P.C. Support                               Date: 14 Aug 94
RM-ERB-CUST-ENQUIRY
Customer No: 001017   Customer Name: SPARSHOP BELLOWS PAR
Select:-
1 ... Current Orders
2 ... Enter Payment
3 ... Customer Bill
4 ... Customer History
5 ... Standing Orders
6 ... Future Temp.
7 ... Holidays
8 ... Hampers
9 ... Customer Details
X-Select Another Customer
Select Option Required From The Choice Below.
1..Address 2..Details 3..Messages 4..Discounts 5..Exit INT SPOOLING
```

Option 1 Address, from here you can maintain all the current customers name and address details. Option 2 Details, enables the maintenance of the customer billing and setup defaults. Option 3 Messages, Option 4 appears on account customers only, and allows the changing of customer discounts. Option 4 or 5 allows the entry and updating of the customer messages for the Roundsbook

## Menu Map 1,9,1

```
(C) Copyright P.C. Support                               Date: 14 Aug 94
RM-ERB-CUST-ENQUIRY
Custo
      RETAIL CUSTOMER ADDRESS DETAILS.
      Name           : Armstrong
      Full Name      : Mrs Armstrong
      Short Name     : 26 Victoria Road
      Room Number    :
      House Name/No. : 26
      Street         : Victoria Road 2
      Address Street : Victoria Road
      Town          :
      County        :
      Post Code     :
      Telephone     :
```

Confirm/Enter New Account Name.

PRINT SPOOLING

From here you can maintain all the current customers name and address details, the full name and address street can be printed on the bills instead of the name and house name or number and the street. Entry of a Name is compulsory, if you have no name then enter a full stop or a question mark.

The changing of the street details are covered under the maintenance of the rounds, and can only be done from there.

## Menu Map 1,9,2

```
<C> Copyright P.C. Support                               Date: 14 Aug 94
RM-ERB-CUST-ENQUIRY
Customer No: 001017   Customer Name: SPARSHOP BELLOWS PAR
Account Details.
Style                : 10
Delivery Seq        : ↑
Collect Seq         :
Pay Day             : SA
Bill Type           : 9
Round               : 00
Sub Round           : 00
Default Price       : 1
Discount Type       : A
Type Customer       : Ac
Account Style Codes
10 - Semi-Retail Weekly Customer
11 - Semi-Retail Weekly For
    Producer Processors
12 - Semi-Retail Monthly Customer
Confirm/Enter Customer Style - <10 -> 13).
PRINT SPOOLING
```

The customer styles are displayed on screen for you to confirm the type of customer. This display depends on the type of customer selected.

The delivery and collection sequences are not changed at this point

The pay day can be set to any day of the week, this allows you to print bills for customers for the whole week but only for those customers with their pay day set to the day selected. The bill type is the layout of the bill used for this customer, you have the option of 6 layouts for weekly billed customers, 2 layouts for fortnightly or monthly billed customers and 2 layouts for semi retail customers. The round number cannot be changed on this screen. The sub round number can be set so that you can exclude customers that you do not want in the Roundsbook or bills printed for.

Discount type is only for semi retail customers, and is entered as an A or P, A = amount per unit, P = percentage per unit.

## Menu Map 1, 9, 2

```
<C> Copyright P.C. Support                               Date: 14 Aug 94
RM-ERB-CUST-ENQUIRY
Customer No: 001017   Customer Name: SPARSHOP BELLOWS PAR
Account Details.
Style                : 12
Delivery Seq         :      4.00
Collect Seq          :      4.00
Pay Day              : SAT
Bill Type            : 8
Round
Sub Round
Default Price
Discount Type
Type Customer
Order Processing Parameters
Print Delivery Notes: Y  Y/N
Print Zero Lines:    f  Y/N
Print Priced Delivery Notes: N  Y/N
Enter Y to print delivery notes for this customer
PRINT SPOOLING
```

If Order Processing is in use then you can now set if you require delivery notes for, this customer, if you need to print products with a 0 quantity, and the ability to print priced delivery notes for selected customers.

## Menu Map 1,9,3

```
<C> Copyright P.C. Support                               Date: 14 Aug 94
RM-ERB-CUST-ENQUIRY
Customer No: 001004   Customer Name: 26 Uictoria Road
Customer Messages.
Messages Displayed : ██████████
Before Delivery    : ↑
                  :
                  :
Displayed After    :
Delivery          :
Enter Messages Or Use / To Lookup.
PRINT SPOOLING
```

The next screen allows the input of messages for the Roundsman about the customer, these will be printed in the Roundsbook. The before delivery message is a total of 80 characters long and will be printed with the customers name in the Roundsbook. The after delivery message is a total of 40 characters long and will be printed with the totals line for this customer.