



TSH Tip

Flyer and Gift Distribution Logic in Vision

Overview of this TSH Tip

Who should use this TSH Tip?

Systems managers and administrators, customer service representatives and managers, purchasing agents, salespeople, and anyone who needs to use Vision™ to monitor which customers are receiving flyers and gifts.

What will this TSH Tip help you do?

This TSH Tip will help you do several things:

- Understand the Vision logic that determines if and when flyers and gifts are included in customers' orders.
- Use Company File Maintenance to view and modify (1) the minimum order dollar amounts that customers must meet to receive gifts and flyers and (2) the product numbers of the gift and the flyer.
- Use Customer Master File Maintenance to view and modify the flags that determine if a particular customer is eligible to receive gifts and flyers.
- Inquire about a particular order to see if a flyer or gift was included.

Which parts of Vision are discussed?

Company File Maintenance (menu-12.1.1.1.F1)

Customer Master File Maintenance (menu-12.2.2.F2)

Inquiries for orders that include flyers and gifts

Pick tickets, packing lists, and delivery tickets for orders that include flyers and gifts

Introduction

Gifts and flyers are two ways to reward customers who have spent a certain dollar amount on your products.

- The free gifts are included in a customer's order if the order has met or exceeded a minimum dollar amount.
- The Merchandise department in your company may work with vendors to develop special pricing on various products, and flyers listing these products and special prices may be created for select customers. A flyer is included in a customer's order if the order has met or exceeded a minimum dollar amount.

Setting up Flyer Distribution in Vision

A customer will receive a flyer with his or her order if all of the following are true:

- A flyer is identified in the Flyer Prod No. field in Company File Maintenance (menu-12.1.1.1.F1).
- The dollar amount of the order meets or exceeds the amount in the Min Flyer Ord\$ field in Company File Maintenance (menu-12.1.1.1.F1).
- The Flyer Eligible? field in Customer Master File Maintenance (menu-12.2.2.F2) for that customer is set to Y.
- The customer has not received a flyer since the last time End-of-Month was run. In other words, customers can receive flyers only once a month.

Specifying Flyer Information for a Company

To specify flyer information for a company in Vision, use Company File Maintenance (menu-12.1.1.1.F1).

```
COMPANY.HDR0          Company File Maintenance          01/23/01 11:01:36
Company#.....: 01          GL Sales Month: 0204          Reporting Month: 0203
                                AP Month: 0204
                                GL Month/Yr: 0101 / 2001
1.Company Name...: OFFICE PRODUCTS, INC.          16.Minimum GP %...: 5
2.Address 1.....: Clay Office Building          17.Maximum GP %...: 50
3.Address 2.....: 1 Commercial Blvd # 201          18.Cash Disc. %...: 0.00
4.City.....: Carmichael          19.Write/off $...: 0.00
5.State.....: CA          20.Min Ord $...: 0
6.Zip Code.....: 94949          21.Surcharge $...: 0.00
7.Phone Number...: 800-333-4512          22.Cred Days.....: 30
8.Fax Number....: 777-679-1000          23.Cred Auth Pswd.: PEPSI
9.Fiscal Month...: 05          24.Credit Card Hld: Y
10.Tax Regist #..: DDSG-21-123777-          25.Spec.Itm.Create: Y
11.FSC Company No:          26.Spec.Itm.MinGP%: 10
12.Min Gift Ord $: 500.00          27.Future Use.....:
13.Gift Prod No. : GIFT          28.PH Purch Flag..: Y
14.Min Flyer Ord$: 10.00          29.Price Override%: 50.00
15.Flyer Prod No.: OPI-01          30.Com Clawbck Ind: N
31.Com Clawbck Day:
32.Com Clawbck %.:
33.Spc.Commission:          34.Cont.Com.Cost...:
                                Ln#, (S#), (R), (DELETE), (F#), (?), (0)Accept:
```

Min Flyer Ord\$

This field contains the minimum dollar amount required on an order for a customer to be eligible for a flyer.

Flyer Prod No.

This field contains the product number of the flyer to be added to the customer's order when the order meets or exceeds the amount in the Min Flyer Ord\$ field. The flyer is set up as a product with a warehouse location and zone and appears on the picker and packing/delivery ticket. A flyer picker is not printed for BULK orders.

Specifying Flyer Information for a Customer

To make a customer eligible to receive flyers, use Customer Master File Maintenance (menu-12.2.2.F2).

```
CUST.MAST.HDR1 The Systems House, Inc. 12/28/00 13:12:28
Customer Master File Maintenance Two
Ext Cust #...: 123456 Northwest Hospital Internal#: 123456

1. Deposit Req.%: 17. Desktop Delivery...: N
2. Serv. Priority: 9 18. Gift Eligible?...: Y
3. Response Time: 19. Flyer Eligible?...: Y
4. Fax #.....: 20. Fax/Email Ord Ack?: N
5. Bypass. MinOrd: N 21. Num. Of Workers...:
6. Co Identifier: OPI 22. PWDS Indicator...: Y
7. DUNS Number...: 23. Remote OE MapLoc...:
8. Pull. Stmt. Ind: N 24. OE Alloc Match...:
9. NewBusinessDt: 25. Cred. Card Level...: 2 UNSPSC?: N
10. Survey Date...: 26. National Sales?...: N
11. Send BO info?: N 27. E-Mail Order Ack...:
12. Apply Credit?: Y 28. Report Card Grp...:
13. SIC Code.....: 29. C.C. Ref (S/C/R)...: C

14. Cust. Srv. Rep.: 000001 NAME OF CSR 000001
15. Credit Card #: Expires: Type:
16. Invoice Msg...:
:
Ln#, (S#), (R), (DELETE), (F#), (?), (0)Accept:
```

Flyer Eligible?

If you enter Y, the customer can receive a flyer as part of his or her order, provided the following are true:

- A flyer is identified in the Flyer Prod No. field in Company File Maintenance (menu-12.1.1.1.F1).
- The order meets or exceeds the Min Flyer Ord\$ amount stored in Company File Maintenance (menu-12.1.1.1.F1).
- The customer has not received a flyer since the last End-of-Month jobstream was run.

If you enter N, the customer will not receive the flyer.

Setting up Gift Distribution in Vision

A customer will receive a free gift with his or her order if all of the following are true:

- A gift item is identified in the Gift Prod No. field in Company File Maintenance (menu-12.1.1.1.F1).
- The dollar amount of the order meets or exceeds the amount in the Min Gift Ord \$ field in Company File Maintenance (menu-12.1.1.1.F1).
- The Gift Eligible? field in Customer Master File Maintenance (menu-12.2.2.F2) for that customer is set to Y.

Specifying Gift Information for a Company

To enter gift information for a company in Vision, use Company File Maintenance (menu-12.1.1.1.F1).

```
COMPANY.HDR0      Company File Maintenance      01/23/01 11:01:36
Company#.....: 01      GL Sales Month: 0204      Reporting Month: 0203
AP Month: 0204
GL Month/Yr: 0101 / 2001
1.Company Name...: OFFICE PRODUCTS, INC.      16.Minimum GP %...: 5
2.Address 1.....: Clay Office Building      17.Maximum GP %...: 50
3.Address 2.....: 1 Commercial Blvd # 201    18.Cash Disc. %...: 0.00
4.City.....: Carmichael      19.Write/off $...: 0.00
5.State.....: CA      20.Min Ord $...: 0
6.Zip Code.....: 94949      21.Surcharge $...: 0.00
7.Phone Number...: 800-333-4512      22.Cred Days.....: 30
8.Fax Number....: 777-679-1000      23.Cred Auth Pswd.: PEPSI
9.Fiscal Month...: 05      24.Credit Card Hld: Y
10.Tax Regist #..: DDSG-21-123777-      25.Spec.Itm.Create: Y
11.FSC Company No.:      26.Spec.Itm MinGP%: 10
12.Min Gift Ord $: 500.00      27.Future Use.....:
13.Gift Prod No..: GIFT      28.PH Purch Flag..: Y
14.Min Flyer Ord$: 10.00      29.Price Override%: 50.00
15.Flyer Prod No.: OPI-01      30.Com Clawbck Ind: N
31.Com Clawbck Day:
32.Com Clawbck %.:
33.Spc.Commission:      34.Cont.Com.Cost...:
Ln#, (S#), (R), (DELETE), (F#), (?), (0)Accept:
```

Min Gift Ord \$

This field contains the minimum dollar amount required on an order for a customer to be eligible for a free gift.

Gift Prod No.

This field contains the product number of the free gift to be added to the customer's order when the order meets or exceeds the dollar amount in the Min Gift Ord \$ field. The gift is set up as a product with a warehouse location and zone, and it appears on the picker and packing/delivery ticket. A gift picker is not printed for BULK orders.

Specifying Gift Information for a Customer

To make a customer eligible to receive free gifts, use Customer Master File Maintenance (menu-12.2.2.F2).

```
CUST.MAST.HDR1          The Systems House, Inc.          12/28/00 13:12:28
                        Customer Master File Maintenance Two
Ext Cust #...: 123456 Northwest Hospital          Internal#: 123456

1. Deposit Req.%:                17. Desktop Delivery...: N
2. Serv. Priority: 9              18. Gift Eligible?...: Y
3. Response Time:                19. Flyer Eligible?...: Y
4. Fax #.....:                 20. Fax/Email Ord Ack?: N
5. Bypass.MinOrd: N              21. Num. Of Workers...:
6. Co Identifier: OPI            22. PWDS Indicator....: Y
7. DUNS Number...:              23. Remote OE MapLoc...:
8. Pull.Stnt.Ind: N              24. OE Alloc Match....:
9. NewBusinessDt:                25. Cred. Card Level...: 2 UNSPSC?: N
10. Survey Date...:              26. National Sales?...: N
11. Send BO info?: N             27. E-Mail Order Ack...:
12. Apply Credit?: Y
13. SIC Code.....:              28. Report Card Grp...:
                                29. C.C. Ref (S/C/R)...: C

14. Cust.Srv.Rep.: 000001 NAME OF CSR 000001
15. Credit Card.#:                Expires:          Type:
16. Invoice Msg...:
    :
    Ln#, (S#), (R), (DELETE), (F#), (?), (0)Accept:
```

Gift Eligible?

If you enter Y, the customer can receive a free gift as part of his or her order, provided the following are true:

- A gift is identified in the Gift Prod No. field in Company File Maintenance (menu-12.1.1.1.F1).
- The order meets or exceeds the Min Gift Ord \$ amount stored in Company File Maintenance (menu-12.1.1.1.F1).

If you enter N, the customer will not receive the free gift.

Inquiries for Orders that Include Flyers and Gifts

You will not notice during order entry if Vision has automatically added a flyer and/or a gift to an order. However, flyers and gifts are listed for orders in Vision's Inquiries.

Detailed Order Inquiry (menu-19.1.2) and Detailed Release Inquiry (menu-19.1.5) are two examples of inquiries that you can use to determine if any flyers or gifts have been added to an order. Examples of both, with flyers and gifts included, are shown below.

Detailed Order Inquiry (Menu-19.1.2)

The gift that Vision added to the order detailed in the sample screen shown below has a product number of GIFT. The flyer has a product number of OPI-01.

wIntegrate Windows Sockets

File Edit Setup Run Help

Order # 01-AA1814 Whse 001 Cust # 123456
 Date: 12/28/00 Due.: 12/28/00
 Job#: Northwest Hospital
 800 W. Central
 Arlington Heig, IL. 60540

Ship To Name and Address
 Northwest Hospital
 800 W. Central
 Arlington Heig, IL. 60540

OS S P B DS Holds CS
 01 Y Y Y N

Status: OPEN CSR: 000001 Operator: GENERAL MAINT KEY
 Spec Inst: OTime: 08:36AM Blkt PO#:
 No. Lines: 003 No. Rel: 001 Slsrp: 001-House Cust Ref:

Ln#	Product Number	Ord	Shp	B/O	Pick	UM	Price	Disc	Orig Val
1	APL-M3602GA LASER TONER, BLACK	3 A2	0	0	3	EA	398.330 267.040		1194.99
2	GIFT Free qift	1 X	0	0	1	EA	0.000 0.000		
3	OPI-01 Flyer 01, OPI	1 ABC	0	0	1	EA	0.000 0.000		

Qte Dep\$: Dep Rcvd\$: Dep App\$: Frt: 0.00
 Cash Recv: B/O\$: 0.00 Ord\$: 1194.99 Tax%: 6.000 Tax: 71.70
 CCtype: CustCd: Total: 1266.69
 (L#)=Line Desc, (U#), (A)ctivity, (W)h1r, (T)ax, (P)rint, (0)Continue:
 DET.00

Ready Ln 22, Col 65 CAP NUM

Detailed Release Inquiry (Menu-19.1.5)

The gift that Vision added to the release detailed in the sample screen shown below has a product number of GIFT. The flyer has a product number of OPI-01.

```

wIntegrate Windows Sockets
File Edit Setup Run Help
[Icons]
Order #-Rel Whse      Detail Invoice Inquiry      001
01AA1814-001 001 Cust #      Cust. Name and Address      Ship To Name and Address
Job#:                123456      Northwest Hospital          Northwest Hospital
Inv#:                800 W. Central          800 W. Central
Ord Dt: 12/28/00      Arlington Heights, IL.    Arlington Heights, IL.
Shp Dt: 12/28/00      60540                  60540
Status: UN-PRINTED PICKER
Map Location:60540/Suellyn's Test Route/A
Spec Inst:                Terms:NET 30              Blkt PO#:
NoLns:003 OrdSrc: 01 S1sp:001-House      Ref:                Cstcd:
Ln# Product Number      Ord  Shp  B/O  Pick  UM      Price  Gp %  Extension
1  APL-M3602GA           3    0    0    3    EA      398.330 33.0  1194.99
   LASER TONER, BLACK    02    ND DAISY          267.040
2  GIFT                   1    0    0    1    EA      0.000  0.0
   Free gift             X    ND SPR           0.000
3  OPI-01                 1    0    0    1    EA      0.000  0.0
   Flyer 01, OPI        ABC    ND TEST          0.000

Blk/Bin/Whl Ctns Weight Zone Tax.Jur Opr Type      Frt:      0.00
              0.00 530 00001 gmK Reg      Tax%:6.000 Tax:      71.70
(L#)=Line Desc,(U#),(O)rder-inqry,(T)ax,(P)rint,(0)Continue: Total: 1266.69
                                  DET.REL

Ready Ln 22, Col 61 CAP NUM

```

Pick Tickets for Orders that Include Flyers and Gifts

Pick tickets that are generated for an order show any gift or flyer that should be included. The pick ticket shown below includes a flyer and a gift. The product number of the gift is GIFT, and the product number of the flyer is OPI-01.

WHSE: 001	OFFICE PRODUCTS, INC.	OFFICE PRODUCTS, INC.	Picking List	Page: 1
01AA1814001			Original notag	
Ship Route: 530	Shipping Wave:			
Packing List No.	Customer Name	Cust No.	Print Date	Order Date
01AA1814001	Northwest Hospital	123456	12/28/00	12/28/00
Bill To:	Northwest Hospital	Ship To:	Northwest Hospital	
	800 W. Central		800 W. Central	
	Arlington Heights, IL 605		Arlington Heights, IL 60540	
Dept # 001 Northwest Hospital				
Ship Via: Suellyn's Test Route/A				
Ctns:				

WHSE LOC	PRODUCT NUMBER	PRODUCT DESCRIPTION	QTY PICK	UNIT OF MEASURE	LINE NO
02ABC	OPI-01	***** BIN ZONE 02 ***** Flyer 01, OPI	1	EA	003
12X	GIFT	***** BIN ZONE 12 ***** Free gift	1	EA	002
AA2	APL-M3602GA	***** BIN ZONE A ***** LASER TONER, BLACK	3	EA	001

Packing Lists for Orders that Include Flyers and Gifts

Packing lists that are generated for an order show any gift or flyer that should be included. The packing list shown below includes a flyer and a gift. The product number of the gift is GIFT, and the product number of the flyer is OPI-01.

530 A 00000				01AA1814001			N/A
				1102 E. Chicago Ave.			
				Chicago, IL 60606			Packing List
847-255-5555				Ship To # 001			
Northwest Hospital				Northwest Hospital			
800 W. Central				800 W. Central			
Arlington Heights, IL 60540				Arlington Heights, IL 60540			
01 AA0240				01/05/01	12/28/00	NET 30	123456
APL-M3602GA	3	3	EA	0	LASER TONER, BLACK		
GIFT	1	1	EA	0	Free gift		
OPI-01	1	1	EA	0	Flyer 01, OPI		
NAME OF CSR 000001 999-888-7777							

Delivery Tickets for Orders that Include Flyers and Gifts

Delivery tickets that are generated for an order show any gift or flyer that should be included. The delivery ticket shown below includes a flyer and a gift. The product number of the gift is GIFT, and the product number of the flyer is OPI-01.

530 A 00000		01AA1814001		1
		1102 E. Chicago Ave.		
		Chicago, IL 60606		Delivery Ticket
847-255-5555		Ship To # 001		
Northwest Hospital		Northwest Hospital		
800 W. Central		800 W. Central		
Arlington Heights, IL 60540		Arlington Heights, IL 60540		
01 AA0240		01/05/01	12/28/00	NET 30 123456
APL-M3602GA	3	3	EA	0 LASER TONER, BLACK
GIFT	1	1	EA	0 Free gift
OPI-01	1	1	EA	0 Flyer 01, OPI
NAME OF CSR 000001 999-888-7777				

Frequently Asked Questions About Flyers and Gifts

Following are some common questions and answers about flyers and gifts in Vision.

Q: Is a gift or flyer picker printed when an order is completely filled by the wholesaler?

A: The gift or flyer prints on the same pick ticket as the item(s) ordered. The ticket, depending on the flag, does not print until after an EDI transmission.

Q: Is a gift or flyer picker printed when an order is BULK only (no split case)?

A: No.

Q: Is gift and flyer logic ignored for National Express Delivery Service (NEDS) orders and/or other drop ship orders?

A: Yes.

Q: Does the gift and flyer logic take place at order entry time or when pickers are printed?

A: The logic takes place at order entry, but the items are not displayed on the line item screen in order entry.

Q: Is a gift or flyer set up as a regular item with a location, and does it show up as a normal line to be picked on the picker?

A: Yes, with the warehouse location and zone.

Q: Is the gift or flyer a regular order line that will show up in history, inquiries, reports, showing detail order information, etc.?

A: Yes.

Q: Does it print on the packing list and/or invoice, or is it just on the picker?

A: It prints on the pick ticket and packing/delivery ticket(s). It does not print on the invoice.

Q: What happens if the flyer or gift is not in stock?

A: Vision does not add the item to the order; therefore, the flyer/gift does not appear on the pick ticket or the packing/delivery ticket(s).