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Welcome

Overview
This document is intended for owners and managers to assist in the configuration and usage of many of the key features available in SPOT. The document does not include all features and usages of SPOT and you would be familiar with the basics of operating the software prior to understanding this document. You will refer to the “Quick Start Guide” and the “Users Manual” for the very basic operations of SPOT.

Many of the key features discussed in this document are not used by the majority of current SPOT users. This generally not because they are not interested in using them but that they do not know they exist or do not know how to implement and configure the options. A review of the table of contents document will get you thinking of how to better use SPOT in your operation. Implementing these features will bring greater efficiencies, control and customer satisfaction along with more profit to your organization.

Basic knowledge of the use of SPOT and the use of the MetaSpace Browser / Configuration utility are required to understand this document. Basic common sense will also need to be used when using this document and configuring your system. If you are not sure of the setting or the configuration please check with SBS Technical support before you make the change. You may cause serious operational issues with SPOT if you do not use basic common sense and proper configuration practices.

This document is updated as features are documented and new features are created. Download and keep up to date with the latest documentation via the web from our Documentation Library.

Configuration Tools and Concepts
You will be using several different tools to configure SPOT as noted in this document. They are shown below and can be accessed with security rights from the Home Page > Setup menu option

- Location Information...
- Users, Groups, Rights...
- SPOT Query...
- Program Configuration...

Location Information – General Company and Store/Location information including name, contact, Email, address and phone information.

Users, Groups, Rights – Detailed user and security configuration are completed in this tool. Access to this is controlled with security and is not intended

SPOT Query – Management and creation of reports, word merges, mail merges etc.

Program Configuration – General settings that will affect the operational process of SPOT are done in this tool. You have several concepts to understand when using this tool.

- **Company Settings** – Settings that will affect your entire company. If you have a single store they will affect that store only. If you have 50 stores, 10 routes and 4 hotels you will affect all of these entities with changes in this area. Company settings include price tables, promised date schedule, credit card processing, tagging, lot information, production configuration along with many other configuration options. Changes to any of these setting will have an effect on all stores and routes in your operation.

- **Store Settings** – Setting that will only affect the store you are logged into. Store setting include cashier settings, credit card, security, search options, racking, Email, route and detail/quick settings. All of these settings may be used to customize each stores operation and feature set store by store.

- **Workstation Settings** – Settings that will affect only the current workstation you are logged into. If you have 10 workstations in your configuration you may have 10 different workstation configurations...
that will give you unique customer prompts, invoice templates, invoice printer, report printer, backup and home page configurations.

**System Settings** – System Settings are not modified with any frequency and will not be discussed much in this document but do relate to the entire “System” System settings include Tax configurations, tag printer definitions and other misc items used by everyone in the system.
This document is a starting point to understand the theory and process of SPOT and the use of its Meta Space Browser for configuration and pricing changes.

This document assumes you understand basic use of SPOT and know the Detail Process used in SPOT. When detailing an order you deal with Departments, Categories, Items, Modifiers, Upcharge, Comments and Adjustments, Store and Workstation Settings. These will be explained in the following paragraphs.

Most pricing changes are done in the Company settings. Company settings are shared among all stores in your enterprise. You will have store specific settings available store by store but the pricing of the items will be set at the Company level under Mark-in Settings. Workstation settings will allow you to tailor options for detailing orders.

Settings discussed in this chapter are also documented in the configuration utility in SPOT. You may review the configuration notes for each setting located in the lower right hand corner of the configuration screen. Any changes made to your configuration will require a reboot on all stations with the exception of the station on which the changes are made.

**Company Mark-in Settings and Configuration**

When you select the “Mark-in Setting” node you are presented with several options on the properties screen on the right side of the Meta Space browser. These options have a huge impact on the Detailing and Pricing methodology for your installation. Make changes to these settings after you are an experienced user and have a deep understanding of the Detail process in SPOT.
Splitting Settings

This option will create the rules for your intelligent invoice splitting. You may choose to split by department group, promised date or quantity. Each option is explained with an example below.

**Department groups** - Each department will create a new invoice at markin time. If you marked in Dry Cleaning and Laundry on the same ticket and had Department Group splitting marked you would get invoice #1 for the DC goods and invoice #2 for the LD goods.

**Promised Date** – Mark-in a pair of blue pants and pair of black pants in your Dry Cleaning department. Both items by default are due on Tuesday. The customer requests the blue pair of pants he needs for Monday. Now change the promised date for the Blue pair of pants to Monday. SPOT will now print invoice #1 with the black pair of pants due Tuesday and invoice #2 for the blue pair of pants due Monday.

**Quantity Quick** – If at the front counter you create quick’s for customers, this setting will split quick invoices using the department group Splitting quantity. If this option is selected, and you have the DC quantity splitting set to 6 pieces and you quick in 8 pieces, SPOT will generate 2 quick invoices. Invoice #1 with 4 pieces and invoice #2 with 4 pieces.

If this option is not selected and you have your DC department group quantity splitting set to 5 pieces with this option enabled it will be ignored. If you quick 8 pieces of DC you will get a quick with 8 pieces on it and not two 4 piece orders. Splitting of the 8 piece order will occur at the time of detail when you’re “Quantity – Detail” option is applied.

**Quantity Detail** –
**SPOT Occupancy** – This option is used if you are using an automatic assembly/sorting system. This setting will allow for conveyors slot occupancy to be set and all items will go towards the occupancy amount. An example would be your slot occupancy is set to 100. Pants take up 33 and jackets are configured to take up 50. 3 pair of pants will fit on a single order or 2 pair of pants but 2 pair of pants and a jacket will automatically split.

**Mark-in Setting Details**

Navigate to Company Settings > Markin Settings and notice as described below you many configuration options that pertain to detail / markin process. The node “Markin Settings” has several options at the “Markin-Settings” level and below. Items available under Markin-in Settings are as follows.

**Price Tables** - These are the actual price tables that can be assigned as a default to a store, a route or specific to a customer. These contain the Promised Date Schedules, Department Groups, Departments, Categories and Items on the Detail markin screens. The Item level options include Price, Pieces, Modifiers, Upcharge list, Processing costs as well as other pricing options.

**Upcharge Tables** - A collection of Upcharge items that will increase or decrease an items price, piece count or both. Upcharge tables are available for association with any item. Each table contains its own Upcharge unique list of items and may increase or decrease an items price by a fixed dollar amount or a by percentage. Each Upcharge item has options for a price, pieces, quantity, unit descriptors, processing costs as well as other pricing options.

**Alteration Tables** - A collection of Alteration items available for association with an item. Each Alteration table contains items that include a detailed description of the alteration, price, when the alteration is priced, processing days and a default quantity.

**Preferences** - A collection of user definable preferences to be associated to a customer profile and will be seen on the visual invoice and on the printed invoice if configured. By default Starch and Finish preference
lists are defined in configuration. Starch includes None, Light, Medium and Heavy. Finish includes Box, Hang and Fold. Preferences can be created for any customer preference you choose to use. Example preferences are pants, flat work etc.

Modifiers - SPOT has a default Colors, Patterns, Brands and Damage modifier lists. These lists can be modified as needed or new lists can be created and associated as needed per item. Each modifier has pricing and tag printing options. Up to four of these modifiers can be associated to an Item or forced to be used at markin. Each modifier may also have a unique button color on the markin screen for easy viewing by the clerk.

Unit Descriptors - This is the type of unit used by an Upcharge. You may have Per Pound, Per Foot or Per Sq. Foot as just a few examples. Each of these Unit Descriptors has the ability to price per item or use two and three-dimensional pricing. A two dimensional unit descriptor will ask for an “X” and a “Y” measurement giving you square inches, feet, yards etc. A three dimensional unit descriptor will prompt for an “X”, “Y” and “Z” coordinate and calculate cubic inches, feet, yards etc.

Discount Groups - A customer can be assigned a discount group for automatic pricing adjustments. Most installations will use a senior discount, Employee discount and an Owner discount. These discount groups can be a flat amount for all departments and all price tables or can be customized to discount only certain departments per price table. You may also have different discount percentages per department in a price table.

Coupons - Coupons defined to be used to discount an invoice. Coupons may be used in many different configurations using dollar discounts, percentage discounts, by one get one free or any other multiples. See configuration options and details on Coupons in the “Coupons / Promotions” chapter of this document

Invoice Adjustments - Adjustments that affect the price of an entire invoice. These adjustments can be a percentage or fixed price, Adjustments may be applied at any time prior to the invoice being sold and is controlled by security settings. Invoice adjustments can be used to “off-set” the promised day for an invoice or use a price-later option. This will allow the adjustment to be priced at a defined process step for convenient and controlled price later management. Adjustments may be defined to be associated with a visit or a single invoice.

Invoice Comments - These are predefined comments that are associated to an invoice. These comments have no dollar value associated with them and are used to describe or comment any special needs for the invoice. These comments may be used to flag counter, production, assembly personnel or the customer of special needs for the invoice.

Comments - These are predefined comments that pertain to the item only. These comments have no value associated with them. They are just used for generic comments added to an item.

Adjustments - Adjustments that affect the item only. These adjustments can be a percentage or fixed price, applied at mark-in or a price later step and can be associated with a process days off set and can take advantage of our “Rush” tag printing option.

Void Reasons - Generic list of why an Item or Invoice is being voided.

Redo Reasons - Generic list of why an Item or Invoice is being placed in the Redo process.

Cash Credit Reasons - A collection of reasons a customer would be receiving a cash credit. At the time of applying a reason you have the option to Issue or Revoke cash credits, print a receipt and an option for details as to why the cash credit is being given to the customer.

Credit Card Adjustment Reasons - Reasons for a customer to receive a credit card adjustment. Each reason has the option to Debit or Credit the customer’s credit card and optional details as to why the adjustment is being given to the customer.

A/R Adjustment Reasons - Reasons for a customer to receive an A/R adjustment. Each reason has the option to Debit or Credit the customer’s account with optional details as to why the adjustment is being given to the customer. This adjustment also has the option to be a “restricted” adjustment. Restricted adjustments require a second level of security before the adjustment can be applied.
Payin Reasons - Generic list of reasons for a clerk to create a Payin to the cash drawer. These can range from extra change in pocket or found change. Each of these reasons has the option to set a ceiling amount, create a receipt, make detailed comments or set a pre-defined forced amount for the Payin. This reason list also supports the “Restricted” security setting.

Payout Reasons - Generic list of reasons for a clerk to create a Payout from the cash drawer. These can range from window cleaning to COD shipment. Each of these reasons has the option to set a ceiling amount, create a receipt and make detailed comments or a pre-defined forced amount for the payout. This reason list also supports the “Restricted” security setting.

Price Table / Item Level Configuration
Below you will find details of an item in your price table. These item level options are found by navigating to Setup > Program Configuration > Company Settings > Markin Settings > Price Table > Current Price Table > Department > Category > Item > Item Detail. When reviewing the list of options available you will find details for each item and its description / usage in the lower right hand corner of the screen. This “Configuration Notes” field will explain all fields and any associated configuration options. Some of the most commonly used “Item” level configuration options are as follows.

Item Name - Name of the item as it will be displayed on the Detail screen, Visual Invoice, Reports and Printed Invoices. Each item in your price table should have a unique name for each Category. This will allow for more descriptive and accurate Detailing and Reporting

Item Price - The price of each item is set with this option. This is the default price used when creating an invoice and in reporting. You may choose to use other pricing option to override this price at the time of markin, racking etc.

Piece Count - This option is used to calculate how many pieces an item will have as a default. A pair of pants would be set to 1 and a 2-piece suit will be set to 2 and so on. This number will be used to calculate total pieces in an order and is also used in reporting.

Price At - This option allows the configuration of what step the item is priced. By default the item will set to “Default”. This means the item will be priced using the default price at the time of Detail. If you choose the “Detail” option you will be prompted for a price at the time the item is Detailed with a default set to the “Item Price”. If you choose to use the “Step” option the pricing will occur at a defined “Process Step”, usually the racking step. For more details on the “Step” option please read chapter on “Process Step Configuration”

Upcharge Tables – Upcharge’s are additional charges added to a specific item. Upcharge can be either a Positive or a Negative amount. This amount may be either a fixed dollar amount or a percentage of the item. Upcharge tables are associated to a specific item and may or may be shared among many items. For instance your DryCleaning department has a single Upcharge table called “DC” that is associated to all items. An example of a specific Upcharge table association would be all DryCleaning items are associated to the “DC” Upcharge table with the exception of pants that are associated with an Upcharge table of DC-Pants.

With this example you can see the flexibility you have with items and Upcharge tables. You may create as many price tables as required. These are created by navigating to Setup > Program Configuration > Company Settings > Markin Settings > Upcharge Table and creating a new table or modifying an existing table. After this table is created you may associate it to an item. You may review the detail of each item found in an Upcharge table by viewing the configuration notes field.

Modifier Tables / Item Level Configuration
Modifiers are descriptions that are attached to a specific garment at the time of detail / mark-in or at a later time in item view. Modifiers can be used to describe color, patterns and brands of a garment. Others uses of modifiers are damage, starch, label etc. These modifiers may be used to add value to the item it is describing and can be defined by you. The value attached to a modifier may be a positive, negative, fixed or a percentage amount of the item price.
With a limit of four modifiers associated to any single item you may have ten different modifier lists. An item may have a specific list of modifiers available, disabled or required. These options are available at the items level and can be configured with the “Disabled Modifiers” and “Required Modifiers” options.

**Alteration Tables / Item Level Configuration**

Alterations are additional charges added to a specific item via the “Alterations” button on the order detail or the Item details screens. Alterations can be either a Positive or a Negative amount. This amount may be either a fixed dollar amount or a percentage of the item. Alteration tables are associated to a specific item and may or may be shared among many items. For instance your DryCleaning department has a single Alteration table called “DC” that is associated to all items. An example of a specific Alteration table association would be all DryCleaning items are associated to the “DC” Alteration table with the exception of pants that are associated with an Alteration table of DC-Pants.

With this example you can see the flexibility you have with items and Alteration tables. You may create as many Alteration tables as required. These are created by navigating to Setup > Program Configuration > Company Settings > Markin Settings > Alteration Table and creating a new table or modifying an existing table. After this table is created you may associate it to any item. You may review the detail of each item found in an Alteration table by viewing the configuration notes field.

**Upcharge Tables / Item Level Configuration**

Upcharge are additional charges added to a specific item via the “Upcharge’ button on the order detail or the item details screen. Upcharge can be either a Positive or a Negative amount. This amount may be either a fixed dollar amount or a percentage of the item. Upcharge tables are associated to a specific item and may or may be shared among many items. For instance your DryCleaning department has a single Upcharge table called “DC” that is associated to all items. An example of a specific Upcharge table association would be all DryCleaning items are associated to the “DC” Upcharge table with the exception of pants that are associated with an Upcharge table of DC-Pants. Upcharge may also attribute to the piece count of a garment.

With this example you can see the flexibility you have with items and Upcharge tables. You may create as many Upcharge tables as required. These are created by navigating to Setup > Program Configuration > Company Settings > Markin Settings > Upcharge Table and creating a new table or modifying an existing table. After this table is created you may associate it to any item. You may review the details of each Upcharge item by viewing the configuration notes field in the configuration / setup utility.
Price Table Configuration

Overview
This document is a starting point to understand the theory and process of SPOT and the use of its Meta Space Browser for configuration and pricing changes.

This document assumes you understand basic use of SPOT and know the Detail process of SPOT. In Detailing an invoice you deal with Departments, Categories, Items, Modifiers, Upcharge's, Comments and Adjustments. These will all be explained in the following paragraphs.

Most pricing changes are done in the Company settings. Company settings are shared among all stores in your enterprise. You will have store specific settings available store by store but the pricing of the items will be set at the Company level under Mark-in Settings.

Markin Setting Definitions
You will notice in the picture below that you have Company Settings and a node called Mark-In Settings that is expanded. Under the node “Markin Settings” you have the following options.

Price Tables – These are the actual price tables that can be assigned as a default to a store, a route or specific to a customer. These contain the Promised Date Schedules, Department Groups, Departments, Categories and Items on the Detail mark-in screens. The Item level options include Price, Pieces, Modifiers, Upcharge list, Processing costs as well as other pricing options.

Upcharge Tables – A list of Upcharge tables available for association with an Item. Each table contains its own Upcharge items. Each item has options for a Price, Pieces, Quantity, Unit Descriptors and Processing Costs as well as other pricing options.
Alteration Tables – A list of Alterations tables available for association with an item. Each table contains a detailed description of the alteration, price of the alteration, when the alteration gets priced, processing days and quantity.

Preferences – A list of user definable preferences to be associated with a customer. Spot has a default Starch and Finish preference list. Starch includes None, Light, Medium and Heavy. Finish includes Box, Hang and Fold. Preferences can be created for any customer preference you need. Pants, flat work etc.

Modifiers – Spot has a default Colors, Patterns, Brands and Damage as a modifier list. These lists can be modified as needed or new lists can be created and associated as needed per item. Each modifier has pricing and tag printing options. Up to four of these modifiers can be associated to an Item or forced to be used at markin. Each modifier may also have a unique button color on the markin screen for easy viewing by the clerk.

Unit Descriptors – This is the type of unit described by an Upcharge. You may have Per Pound, Per Foot, Per Sq. Foot etc. Each of these Unit Descriptors has the ability to price per item or use two and three-dimensional pricing.

Discount Groups – A customer can be assigned a discount group for automatic pricing adjustments. Most installations will use a Senior discount, Employee discount and an Owner discount. These discount groups can be a flat amount for all departments and all price tables or can be customized to discount only certain departments per price table. You may also have different discount percentages per department in a price table.

Coupons – To be documented at a later time.

Invoice Adjustments – Adjustments that affect the entire invoice. These adjustments can be a percentage or fixed price, applied at mark-in or a price later step and can be associated with a process days off set.

Invoice Comments – These are predefined comments that pertain to the entire invoice. These comments have no value associated with them. They are just used for generic comments added to an invoice.

Comments - These are predefined comments that pertain to the item only. These comments have no value associated with them. They are just used for generic comments added to an item.

Adjustments - Adjustments that affect the item only. These adjustments can be a percentage or fixed price, applied at mark-in or a price later step and can be associated with a process days off set and can take advantage of our “Rush” tag printing option.

Void reasons – Generic list of why an Item or Invoice is being voided.

Redo Reasons – Generic list of why an Item or Invoice is being placed in the Redo process.

Cash Credit Reasons – Reasons for a customer to receive a cash credit. Each reason has the option to Issue or Revoke cash credits, print a receipt and an option for details as to why the cash credit is being given to the customer.

Credit Card Adjustment Reasons - Reasons for a customer to receive a credit card adjustment. Each reason has the option to Debit or Credit the customer’s credit card and optional details as to why the adjustment is being given to the customer.

A/R Adjustment Reasons - Reasons for a customer to receive an A/R adjustment. Each reason has the option to Debit or Credit the customer’s account with optional details as to why the adjustment is being given to the customer. This adjustment also has the option to be a “restricted” adjustment. Restricted adjustments require a second level of security before the adjustment can be applied.

Pay-in Reasons – Generic list of reasons for a clerk to create a Pay-in to the cash drawer. These can range from extra change in pocket or found change. Each of these reasons has the option to set a ceiling amount, create a receipt and make detailed comments or a pre-defined forced amount for the paying. This reason list also supports the “Restricted” security setting.
Payout Reasons - Generic list of reasons for a clerk to create a Payout from the cash drawer. These can range from window cleaning to COD shipment. Each of these reasons has the option to set a ceiling amount, create a receipt and make detailed comments or a pre-defined forced amount for the Payin. This reason list also supports the “Restricted” security setting

Company / Markin Setting
When you select the “markin Setting” node you are presented with several options on the properties screen on the right side of the Meta Space browser. These options are detailed below.

Splitting Settings
These will create the rules for your invoice splitting. You may choose to split by department group, promised date or quantity. Each option is explained with an example below.

**Department groups** - Each department will create a new invoice at markin time. If you marked in Dry Cleaning and Laundry on the same ticket and had Department Group splitting on you would get invoice #1 for the DC goods and invoice #2 for the LD goods.

**Promised Date** – Mark in 1 pair of blue pants and pair of black pants in your Dry Cleaning department. Both items by default are due on Tuesday. The customer requests the blue pair of pants he needs for Monday. Now change the promised date for the Blue pair of pants to Monday. SPOT will now print invoice #1 with the black pair of pants due Tuesday and invoice #2 for the blue pair of pants due Monday.

**Quantity Quick** – If at the front counter you create quick’s for customers this setting will split quick invoices using the department group Splitting quantity.

Option Selected – You have DC quantity splitting set to 6 pieces and you quick in 8 pieces. SPOT will generate 2 quick invoices. Invoice #1 with 4 pieces and invoice #2 with 4 pieces.

Option Not Selected – If you have DC quantity splitting set it will ignore these setting for quick only. If you quick 8 pieces of DC you will get a quick with 8 pieces on it. This will only generate one order for you bag with 8 pieces. Your Detailing clerks will need to use manual splitting or the Quantity – Detail splitting option to create two orders from the original 8 piece quick.

**Quantity Detail** – If you have DC quantity splitting set to 6 pieces and you are detailing an order with 8 pieces you will generally get two 4 piece orders. If you are detailing 2 or 3 piece items your order will be split according to pieces per item. Using the manual “Split” button at Detail can also supersede this setting.

**Slot Occupancy** – This is only used with our Automated Assembly interface to MetalProgetti or when using Item Tracking. The idea behind this is to give a slot a valid width for garments. Let’s use an
example of 100. Pants will have slot occupancy of 33 and your heavy sweaters may be set to 50. SPOT will split according to the garments occupancy per slot.

**Customer Tracking** – Full tracking is the only option currently supported in the latest releases of SPOT.

**Enable Quick Receive** – If this is not enabled you will not be allowed to create a Quick from the Home Page.

**Prompt for Pickup After Quick/Detail** – This option is set to prompt the clerk to go directly to order pickup if the customer has ready orders. This is a time saver for front counters that detail at drop off. If the customer has orders ready and this is checked it will take the clerk directly to the customer’s order pickup screen.

**Hide Categories** – If you do not want to use Categories at markin and want to go directly from the “Department” level to the item level you can select this option. This will give you more room on the detail screen for items but will remove the “Category” completely from the markin screen. If your price tables have been created using categories you will not see anything except the first category’s items and you will need to move items to this first level of the price table.

**Combine Like Items** – Many stores like to see all of the like items on a single line on an invoice. If you detail 3 blue pair of pants with this setting enabled you will see one line item on the VI and the printed invoice showing 3 pants. If you do not have this option enabled you will see three separate line items for 1 pair of blue pants. The items have to be identical. A pair of blue pants with a grass stain will not combine with a plain pair of blue pants. Enabling these options saves space on the VI and on printed invoices.

**Allow Price Modify on Mark-in** – At the detail screen you have a "Modify Item Price" button for easy access to changing item prices. If this is not enabled you will see the button in grey and it is not usable.

**Price Change Clears Additional Charges** – If you have this selected any cost used with "Modify Item Price" will override the price of the item, modifiers and up-charges.
Automated Price Changes

Overview
This document will walk you through the process of updating prices in a price table with a percentage or by a fixed amount for the entire price table. This document assumes you understand the usage and configuration of a price table in SPOT. This utility will allow you to select a price table, department or even an item. You also have the ability to make automated changes to your Upcharge tables. This utility may also be used for simplified price changes on many items. At this time we do not support bulk changes to your Alteration tables.

This utility will require a user to have security access to use this utility. This security setting will be found under Activity Rights > Utilities > Price Change Utility. Any changes made and saved are permanent and cannot be reversed. You may want to export your price table prior to using this utility to ensure the ability to recover from any change in pricing thoughts using this utility.

Updating your price table

The price change utility is found on your Home Screen F3-Menu > General 2 of 3 > Price Change Utility. Selecting the price change utility will display this screen.

Step 1 - You will select a “Price Table” from the “Tables” list. This will populate the department’s list with your price tables departments. You may choose to use all departments or a specific department.

Step 2 - After selecting your price table and department you are ready to configure pricing options. The screen below has the price table “General” and the department “Shirt Laundry” selected. You have the options to select a single price table, all departments or a single department.
Step 3 - Amount (+/-) must be entered. By default it is set to 0 and will assume that any number here will increase the price. If you want to reduce the price enter a negative number here. The example below shows that The General Price table is selected and the Shirt Laundry department will be increased 6% and all prices will be rounded to the nearest .09 cents.

Step 4 – Once you have the pricing parameters set you now have the option to update the prices with the “Calculate” Button. Selecting this option will only calculate the new prices based on the parameters set.
Step 5 – Review the item prices and compare the “Original” and “New Price” Column. You may manually modify any of the prices in the “New Price” column. This allows you to modify any price that was automatically updated with this utility. This will allow you to modify any price in the selected price table and department from within this utility.

Step 6 – Once you have made your price changes you will use the “Save Changes” button so save your changes. Once this option has been selected you permanently save your changes to your existing price table. Before saving your changes make sure you have an export of your current price table and the price table’s changes are correct.

Step 7 – After you have saved your changes users will need to exit and restart SPOT for the updates to price table will be used in production.

Optional Features

The pricing grid in the utility allows you to make quick price changes both automatically and manually. Using the manual process lets you change prices line by line very quickly and is much faster than using the standard interface for modifying price table items.

The utility also allows batch setup of Colors, Patterns, Brands and other selected modifiers. Rather than using the standard configuration utility to enable, disable or require these modifiers just select the price table items and modifiers you want to change and use the “Set as Required”, “Set as Disabled” or “Set as Optional”. You may select a single cell, line or column in this utility and change these options in batch.

If you use this utility for the above options make sure that you have an export of the current price table before processing and you “Save” the changes after making them. These changes are permanent and cannot be reversed.
Department, Category and Item Disclaimers

Overview
The option to print disclaimers for an item dropped off by a customer for items that require a customer’s permission or release to clean before the process begins. In the past companies would use a pre-printed disclaimer and manually fill out the information and have the customer sign it. With this feature set at the item or Upcharge level you will have a form printed form from SPOT to your invoice printer at the time the item is marked in. With the printing of the disclaimer you also have an entry in the activity log showing that the disclaimer was signed by the customer. This feature does not store the signature but does prompt the clerk if it was signed.

The disclaimer prints after you finish and save the invoice during the detail process and based on items not the entire invoice. This allows us to include Department > Category > Item details and invoice numbers on the printed disclaimer. You are not able to print a disclaimer with a quick, only with the detail process of configured Department, Category or Items during the detail process.

Configuration
You will assign a predefined disclaimer to each item or Upcharge you wish to print. You may review the pre-defined items available with Setup > Program Configuration > Company Settings > Markin Settings > Item Disclaimers. Each of these disclaimers is defined in your default installation and may be used as is or modified to your needs.

Sample
This is a copy of the text found in the “Disclaimer Text” field in configuration for the Stain Removal disclaimer.

Date:%Date%CR%CRIt is %Company's%CRprofessional opinion %CRthat further stain removal %CRtechniques on this %CR%DEPARTMENT%CR%CATEGORY%CR%ITEM%CRgarment may cause damage %CRto the fabric and/or dyes. %CRHowever, it may also be %CRpossible to restore your %CRitem to an acceptable %CRRwearable condition with %CRadditional procedures.%CR%CRAthough we are trained %CRprofessional spotters and %CRTake great care to test %CRfor color fastness %CRand possible fabric %CRdamage, there is no way to %CRpredict the outcome %CROf a spotting procedure %CRuntil it has been completed. %CRAfter this reason, we %CRask your permission %CRto continue.%CRASignature: _________________%CRAuthor:_________________%CRIINVOICENUMBER%CREmployee: _______________

This is a list of tokens available for automated replacement during the printing of a disclaimer.

<table>
<thead>
<tr>
<th>Token</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>%DATE</td>
<td>Current Date when the disclaimer is printed</td>
</tr>
<tr>
<td>%DEPARTMENT</td>
<td>Department description as defined in your price table</td>
</tr>
<tr>
<td>%CATEGORY</td>
<td>Category description as defined in price table</td>
</tr>
<tr>
<td>%ITEM</td>
<td>Item description as defined in price table</td>
</tr>
<tr>
<td>%CUSTOMER</td>
<td>Customer name</td>
</tr>
<tr>
<td>%Company</td>
<td>Store / Company Name as defined in SPOT configuration</td>
</tr>
<tr>
<td>%INVOICENUMBER</td>
<td>Current Invoice number of item with disclaimer</td>
</tr>
<tr>
<td>%PROMISEDDATE</td>
<td>Promised date of the invoice associated with the disclaimer</td>
</tr>
<tr>
<td>%CR</td>
<td>This is a carriage return in your form layout. Each time you see this token a new line will be created on your disclaimer form</td>
</tr>
</tbody>
</table>

Company settings
Now that you understand the disclaimer text and configuration you will need to assign the disclaimer type to a Department, Category or to specific Items. If you choose to assign this at the department or category level all items detailed in the department or category will automatically receive the disclaimer. This may be the case in Leather or Wedding gowns but is not used in most cases. Assume you want to assign a single item the
Wet Cleaning disclaimer. You would go to Setup > Program Configuration > Company Settings > Markin Settings > Price Table > Department > Category > Item > Disclaimer and select the disclaimer you want to print with the item being detailed.

**Workstation Settings**

You have the option at the workstation level to print disclaimers. You would go to Setup > Program Configuration > Workstation Settings > Mark-in Settings > Print Disclaimers and enable this option for the workstation. You have the option (default) No, Yes or Prompt for each workstation.
Alert Groups

Group Setup

You have the ability to create store groups and use them with alerts. To utilize the functionality, you must first create the store groups and create/update the searches and alerts you wish to utilize with the functionality.

This is particularly useful for companies that have multiple brands (e.g. Red Hanger/Prestige) or have a restoration store that they wish to exclude from their standard searches and alerts.

1. Go to Setup > Location Information > Company Tab > Store Groups

2. Change your Group Context to Alerts.
   a. Click on Store Groups and click Add Group.
   b. Enter your group name (e.g. Dependable Plant 08).
3. Select the name of your group and place a checkmark next to all stores that contribute to the group.

4. Repeat this process until all store groups have been created. Close the dialog when completed.
5. To update the searches and alerts to utilize this functionality, you must replace the `%ACCOUNTNODEID` token in the search and alert with `%GROUPACCOUNTNODEIDS`.
   a. ***Note: I strongly recommend that you do not modify existing alerts, but make a copy of an existing alert and modify it. This is extremely easy. See below.***
Preset Promised Dates

Overview
Preset promised dates are used for those times that you would like to override the standard promised date schedule for a single machine. This could be a time that a large rush job has just arrived, the boiler is down, it is extremely busy day and production is behind etc. This setting effect Quick and Detailed orders including “all” departments and price tables but only effects the workstation it has been enabled. The presets are reset either by turning it off or by exiting SPOT. This feature should be used with caution.

Setup Preset Promised Dates

1- Navigate to the “Home Page” > Menu – F3 > General 1 of 4 > Preset Promised Dates and you will be taken to the screen below.

![Preset Promised Date Screen](image)

2- This screen will set the override date and time for the workstation. By selecting a date and time and selecting the “Preset Promised Date is Off” button you will display the following screen and have preset promised dates enabled.
3- Select the “OK” to return to the Home Page and begin using the preset promised day.

To turn the preset promised day off follow the instruction below and select the “Preset Promised Date is ON” button and select “OK” to return to the Home Page or exit SPOT and reload at any time.
Production Commitments

Overview

Of the many advanced features in SPOT, you will find the “Production Commitment” options to be very powerful in assisting you in decisions based on order and item production. With production being the most important part of your operations, SPOT can assist in giving you real time production commitment numbers within the Quick and Detail process step and the Alerts tab on the Home Page as well as supporting reports. You may view production commitments with single store data or as a central plant with multiple stores feeding the central plant’s production commitment data. You may have a single plant or multiple plants with multiple drop stores. Centralized / Hosted configuration of SPOT must be used for the multiple store configurations.

Using Production Commitments

You will notice differences in the two views of the Home Page below. The first is the view uses the “Standard” or default Production Commitment Mode. The second uses the “Advanced” Production Commitment Mode. The major differences in these modes are display the of Group/Sponsor and Store and Sponsor Level detail buttons. In standard mode the “Stores in Sponsor” and the “This Store” buttons are disabled.
“Standard” mode will use all production pieces committed from Quick and Detailed orders by department group across the entire company.

“Advanced” mode uses logic that we call “Sponsor” to enable the display of the Quick and Detailed orders by Sponsor. A “Sponsor” can be set at the department group, department, category or item level. A simple configuration example of Sponsors would be:

**Example**

<table>
<thead>
<tr>
<th>Department Group</th>
<th>Department</th>
<th>Category</th>
<th>Item</th>
<th>Sponsor</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dry Cleaning</td>
<td>Dry Cleaning</td>
<td>Pants</td>
<td>Regular</td>
<td>DC – Pants</td>
</tr>
<tr>
<td></td>
<td>Dry Cleaning</td>
<td></td>
<td></td>
<td>DC – Pants</td>
</tr>
<tr>
<td>Laundry</td>
<td>Shirts</td>
<td></td>
<td>Regular</td>
<td>LD – Shirt</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>LD – Shirt</td>
</tr>
</tbody>
</table>

Using the Advanced option in the Dryclean pants example above, the Sponsor for each department group allows all Quicked orders to be accumulated to the “General – DC” production sponsor. The department uses the “DC” Sponsor while the Category and Item use the sponsor “DC – Pants”. This will allow you to look at all orders and pieces at the item sponsor level for greater detail as to what items are committed, not just the number of “DC” pieces. When you detail the order you will then move the pieces from the “General – DC”
sponsor to the items sponsor “DC – Pants”. You are now able to view how many “DC” pieces you have in production and also how many “DC-Pants” are committed for a given day.

In the Laundry items above, notice that the item levels are set to “LD – Shirt” and “LD – Queen”. You will now be able to see committed numbers of shirts and queen size sheets you currently have committed for production.

For example you have Quicked one invoice for the DryCleaning and Laundry department and both have 5 pieces. You will see the production commitment showing the orders committed in the “General – LD” and “General – DC” sponsor group for the date promised.

In this example, you also have detailed orders with 2 pieces of Dryclean pants and a 3-piece order for laundered shirts. You can now see the production commitment grid below updated to reflect all pieces that have been committed to production. You now can see “General – DC”, “General – LD”, “Pants – DC”, “Shirts – LD” and their related committed pieces.

Let’s now use the example of 100 laundered shirts that are Quicked and you then Detail 50 of the 100 pieces. You will then see 50 pieces for the “General – LD” and 50 pieces for “Shirts – LD” displayed on the production commitment grid. By now you can see how the sponsors work in relationship to the Department Group, Department, Category and item.
Operations that have centralized plants and supply production resources to dry stores can take advantage of the production commitment with even more detail. You can create your sponsor groups based upon plant and store relationships and create store assignments to a group to display production commitment details by store. This will allow store level control of production association, allowing production commitment numbers to be viewed and reported on by the group. These numbers may be viewed at the sponsor level or at the local store level via the onscreen “Stores in Sponsor” or the “This Store” button just to the left of the commitment grid.

**Setup and Configuration**

You will need to decide which “Production Commitment” mode you will be using. The following examples will assist you in configuring your production commitments.

**Company Settings**

The first setting you will need to configure is Company Settings / Production Settings.

**Production Commitment Mode** – You have the option of either using the default “Standard” configuration mode, or, as mentioned above, the “Advanced” mode. “Standard” mode assumes you are using a single production commitment based on the “Department Group” and assumes a single plant configuration for the entire company. The “Advanced” option allows you to create multiple sponsors and assign them to each department, category, item and store. If you are looking for more control and details of both store and items detail as discussed previously in this document you will want to choose “Advanced”. Selecting “Advanced” is just the start of the configuration. You must follow the configuration information below in order to use the advanced features.

**Production Commitment Complete** – By default when an order is scanned to a ready status it will be removed from the production commitment screen. This option will allow you to have items removed from the production commitment screen as soon as it passes the configured process step. An example would be as soon as the invoice leaves the “Assembly” bay when using assisted assembly or the “Assembly” conveyor the items would be removed from the production commitment screen. If you have a bagging step and scan orders at this step, configure this setting to “Bagging” and invoices will be removed from the production commitment when the invoice is scanned. This setting requires the use of “Advanced Mode”.

**Production Commitment – Remove at Assembly** – This is a setting that will override the Production Commitment Complete setting mentioned above. As soon as an invoice is assembled via assisted assembly or automated assembly it will be removed from the commitment screen. This setting requires the use of “Advanced Mode”.

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Production Commitment – Show Itemized – This is a must use option. Enabling this setting will provide you with an item view rather than the default search view. This view will allow you to see item level details rather than viewing invoice by invoice. *This setting requires the use of “Advanced Mode”.*

Production Sponsors - This is the lowest level of sponsor logic. This will be assigned to your departments, categories and items in the price table and is what will give you maximum flexibility for reporting and visual display of your current production commitments. As the example below shows, you will use this to establish your Category or Item level details such as “Shirts - LD” or “Long Sleeve Shirts - LD”, “Pants - LD”, “Dress - LD” etc.

**Name** – Displayed name of the sponsor. This name will be used in reporting and on the visual display on the Home Page’s “Production Commitment” grid.

**Abbreviation** – Short name for the item for future reporting and is not required at this time.

**Default Caution Pieces** – Used as the base line for production in a given sponsor. This number will be used to notify a clerk at quick.

**Default Maximum Pieces** – Used for calculation of maximum production and is only used for reporting at this time.

**Sponsor Group** – This is the “Production Sponsor Group” used to calculate general department commitments for Quick’s.
Production Sponsor Groups – Used to calculate the department-level commitments made at the time of a “Quick”. At Quick you only know the department and not the item detail. This allows you to create a parent to the “Production Sponsor” and then report on that. The example given earlier was you Quick 100 shirts in the Laundry department. These 100 pieces will then be placed in the “Sponsor Group” assigned to the department.

Name – Displayed name of the sponsor group. This name will be used in reporting and on the visual display on the Home Page’s “Production Commitment” grid.

Default Caution Piece Count – This number is the daily production number for that department. If you know you can comfortably produce 500 pieces of DryCleaning in a day you would place 500 in this field. At the time of a Quick, if this number is exceeded you will see a “Yellow Caution” mark on the day the production commitments have been exceeded.

Default Maximum Piece Count – This is the maximum capacity of your plant for a day. If you know you can comfortably produce 500 pieces and could produce 600 if you had to, you
would place 600 in this field. At the time of Quick, if this number is exceeded you will see a “Red Caution” mark on the day the maximum production commitments have been exceeded.

**Store Settings**

These settings are for the Store level only. You will inherit the company settings at the store level unless you override them.

![Image of Store Settings dialog box]

**Production Sponsor Settings** – This setting, if left at “0”, will be inherited from the Company / Production Sponsor setting. You have the option to overwrite at the store level if needed.

![Image of Production Sponsor Settings dialog box]

**Sites to Include** – By placing a check mark next to a store on the list, this store’s totals are included in the displayed production commitment numbers on the Home Page. If you choose to include only this store and the plant from the list you will only see those items on the Home Page “Production Commitment” grid.
Price Table Configuration

Each price table will require configuration if you are using either the “Standard” or the “Advanced Mode” of Production Commitment. You are required to configure settings at the “Department” only for “Standard” and “Department”, “Category” and “Item” when using the “Advanced” mode.

Standard Mode – Required settings at the price tables “Department” setting are required to enable Quick and Detailed orders to feed department level Production Commitment data.

Department / Caution Load Amount - This number is the daily production number for that department. If you know you can comfortably produce 500 pieces of DryCleaning in a day, you would place 500 in this field. At quick, if this number is exceeded you will see a “Yellow Caution” mark on the day the production commitments have been exceeded.

Department / Maximum Load Amount - This is the maximum capacity of your plant for a day. If you know you can comfortably produce 500 pieces and could produce 600 if you had to you, would place 600 in this field. At the time of Quick3, if this number is exceeded you will
see a "Red Caution" mark on the day the maximum production commitments have been exceeded.

**Advanced Mode** – Required Settings for Advanced mode are much more involved than using standard mode.

**Departments / Maximum Load Amount** – Set this to “0” for each department

**Departments / Caution Load Amount** – Set this to “0” for each department

**Production Sponsor** – Select the Sponsor that will represent this department. This sponsor can be set at the department level and will then be inherited by the categories and items below it.

**Departments / Category / Production Sponsor** - Select the Sponsor that will represent this category. This sponsor can be inherited from the department it belongs to by leaving blank, or it can be set at this level and inherited by the items below it.

**Departments / Category / Item / Production Sponsor** - Select the Sponsor that will represent this item. This sponsor can be inherited from the department or category it belongs to by leaving blank, or it can be set at the Item level

Note: If you choose to leave a “Production Sponsor” field blank at the Department, Category or Item level, the sponsor will be inherited from the parent. Example, you can set the “Shirts – LD” departments “Production Sponsor” to “Shirts – LD” and leave the Category and Item sponsors blank and the “Shirts – LD” sponsor group will be inherited from the item level.

**Simplified Daily Production Commitments Override**

After reviewing this chapter to this point you may choose to use this less complex configuration option to assist you in production commitments and automatic promised date assignments based on actual commitments in your store. Advanced Production Commitment may be used by the item, category and department or sponsor level. This option is a simpler means and uses only department level data by day to calculate your “Daily Production Commitments” scheduling. This option will allow you to setup store based production numbers by department by day as opposed to the advanced configuration featured earlier in this chapter.
Daily Production Commitments configuration will be used as a simple tool that will automatically change promised dates by department based on your workloads defined by day. This feature should best suited for operations that are a single store/plant and do not require the advanced production features as discussed in this chapter.

Configuration

You access the Daily Production Commitments setup from the F3-Menu screens General List. You will select a price table to configure your commitments. After selecting the price table you will set each department’s daily workload. These setting will override any price table “Department” level maximum workloads numbers defined.

In the example above you will notice that Monday is configured to allow for 500 pieces of Shirt Laundry. This means that the promised date schedule will be used until you have marked in 501 pieces of Shirt Laundry. Once piece 501 is detailed / promised for Monday the orders promised date will automatically be moved ahead 1 production day. Wednesday is defined to accept 700 pieces of Shirt Laundry.

The configuration above is intended to be a simple interface to assist in balancing the work from day to day and will override any price table / Department based production configurations. Use of this utility is not intended for use with SPOT’s advanced Production Sponsor logic or across multiple stores.
Issue Manager

Overview

Issue manager has been created to allow you to track step by step issues that arise in your operation. This will include claims, customer complaints, maintenance needs, lost garments, training among other types. The Issue manager is flexible to fit almost any need you may have for tracking a process internal to your organization.

Issue manager is configured with 3 levels of detail with Service, Category and Type. These may be used in any format or organizational process you would like. It is suggested you spend some time with your operations personnel and define these levels your operation requires before configuration begins. The more time you spend planning and designing the better the end result will be when it is time to implement this feature.

You may create issues, assign tasks and report on progress for complete tracking and auditing. You may even print an individual issue from the issue manager. You will find reports based on Issue manager under > Reports Gallery > Issues to complete the tracking, reporting and assignment of responsibilities to issues. Other reports have been designed to give you statistics, estimated costs, actual costs, durations along with the number of issue you have by Service, Category, Item and department.

Like many thing in life the Issue Manager will take time to configure and implement. Issue Manager does require configuration and security rights in order to operate. You have security rights to create, view and close issues. You have the option to review all Issues in your company from the Home screen > F3-Menu > General > Issue Manager or you may view customer specific issues from the customer profile > Issues tab.

How to Use

This section will assume you have default data as provided in the configuration section of this chapter. This section will show you how to create, close and report on issues created with issue manager.

You have access to Issue Manager at both the customer profile > Issues tab or from the Home Screen > F3-Menu > General > Issue Manager for all issues in the company. Access via the customer profile will show only the selected customers issues.

Step 1 - Open the Issue Manager window from the F3-Menu > Issue Manager and you will view the following screen showing open, closed or all issues for the company.
**New Issue** – Create a new Issue.

**Open Issue** – Opens the selected issue in the list view for review and use.

**View Customer** – Opens the customer profile for the selected issue in the list view.

**View All** – Display and view all issues that are both opened and resolved in the company.

**View Open** – Display and view all issues that are in an open status and are pending completion in your company

**View Closed Today** – Display all issues that have been closed today.

**Step 2** – Create a new issue using the “New Issue” button. By selecting this button you will be prompted to search for and select a customer for this new issue. After selecting the customer you will see the following screen.
Step 3 - Select the “Select Issue Type” and you will be prompted with the configured list of Services, Categories and items you have configured for your operation.

Step 4 - After selecting Customer Service > Complaint > Quality you will now view the following screen. You will now display the instructions created in configuration for the Quality action item. At this time you have the option to place any notes, general information and detailed Garment Information that is applicable to this issue.
Below you will view a completed general tab. Many of the fields are free form and others are drop downs that you have configured. The Est. cost field is important to use if applicable. The amount will be used for comparison and calculation in a claim or payment to a customer. Many of these fields may not be applicable depending on the type of issue you are creating. Those that are not applicable leave blank.

Step 5 – After completing your general tab select the “OK” button to accept and save the newly created issue.

Step 6 – Now that the Issue is created you are now available to start using the issue manager. If you select the History / Actions tab this will display all defined actions required to complete and resolve the issue. Notice that the “Review Garment w/Production” is selected and has an open status.
You are now able to attach an optional note applicable to the current action item detail. You will select the action line item and then the “Add Note” at the bottom of the screen. View the second line of the screen below and its note that has been entered.

Step 7 – Now select the Open action and Double Click to expose the details of the action. You have a lot of flexibility with in the detail of the action.
**Assigned Clerk:** By default the user that creates the issue is assigned all action items of the issue. You have the option to assign a specific user for an action item. The user that is assigned to the open item will have this specified action item appear in their “My Task > Issue Manager” folder on the home screen.

**Hours Worked:** Have your users enter the amount of time this action item took to complete. This total time is reportable when the action is completed and is manually entered by the clerk.

**Current Status:** This shows the current status and is available to be changed. You may choose to either select closed from this dropdown or the “close action” button at the bottom of the window.

**Add Note:** Create a note for the action item. You may have multiple notes for a specific action. This is the same functionality as using the History/Actions > Add Notes button.

**Close Action:** This will place the current action in to a closed status. This does the same as the drop down under current status and the close action on the History / Actions screen. Be aware that once an action is closed the action cannot be reopened and notes are no longer available for the action. This is the same functionality as using the History/Actions > Close Action button.

**Step 8** – Select “Close” from the Action Item detail screen to return to the History/Actions screen. Use the “Close Action” button to close the selected item from the History/Actions tab. By closing the action you will update the status to closed and lock all modifications to the item. Notice the action is now displayed in grey and the details of the date, time and user that closed the action are updated. Warning: Once an action item is closed you are unable to open or modify notes and details of the action item.
Step 9 – Open the “Verify Customer Satisfaction” action and assign this action to another user in the system. Once you have assigned a different user and saved the action item have the assigned clerk verify that they now have an entry for the action item there “My Tasks > Issue Manager” on the home screen.

Step 10 – Make notes and close the remaining action items on your list and close all items. Once you have processed the action items and closed all actions you will have completed the issue action items.

Step 11 – Now that the actions are completed you will want to “Resolve” the issue with the “Resolution Tab”. This tab is very important in that you will show the final details and resolution status of the issue. You will find a lot of information on this screen including the number of issues for customer, value of issues, estimated $’s, actual costs, total estimated time, actual time, difference in actual and estimated times etc.
With this information you have the option to resolve and close the current issue. You will want to update the following items to resolve this issue.

Resolution Details: Free form text to enable any final notes and comments about the issue.

Resolution: “None”, “Resolved” or “Waiting on Customer Reply” are your options by default. Using the “Resolved” option you will close the entire issue.

Customer Satisfaction: Use this field to record the customer’s feelings toward the final resolution of the issue. This is a good reporting tool to see how you are resolving issues in the customer’s eyes. This is not a required field to complete the process.

Party Responsible: This will allow you to place responsibility to a group or department in your company. This field is used in reporting and analysis of who is responsible for issues.

Issue Cash Credit: Short cut to issue customer cash credits from this screen. If used from this screen the payment type, date and amount will be automatically updated.

Issue A/R Adjustment: Short cut to issue customer A/R adjustment from this screen. If used from this screen the payment type, date and amount will be automatically updated.

Perform Payout: Short cut to issue a customer Payout from this screen. If used from this screen the payment type, date and amount will be automatically updated.

Perform Write-off: Short cut to write off the invoice amount from this screen. You must have attached an order to this issue in order for this option to be used. If used from this screen the payment type, date and amount will be automatically updated.

Resolve the issue, apply any payments, notes and then press the “OK” to complete the issue.

Step 13 – Congratulations, you have just created, modified, tracked and resolved your first issue. This should give you an understanding of the features and power of the issue manager. This was a very simple example of the use of Issue Manger.
Step 14 – Reporting is available under Reports Gallery > Issue Manager that will allow you to report on open, closed and overdue issues. After creating a few issues explore the reporting available to issue manager and use them to enhance your companies customer service and reporting on what claims, complaints and maintenance actually cost your company in both time and money.

**Configuration Overview and Options**

Configuration starts with a list of required issues you may want to track. As noted in the overview you have Services, Category and Type available for configuration. Here is a sample of these options.

<table>
<thead>
<tr>
<th>Option 1</th>
<th>Services</th>
<th>Category</th>
<th>Type</th>
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</thead>
<tbody>
<tr>
<td>Customer Service</td>
<td></td>
<td></td>
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<tr>
<td>Retail</td>
<td>Customer complaint</td>
<td></td>
<td></td>
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<tr>
<td></td>
<td>Missing Garment</td>
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<tr>
<td></td>
<td>Quality Issue</td>
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<td></td>
</tr>
<tr>
<td>Route</td>
<td>Customer Complaint</td>
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</tr>
<tr>
<td></td>
<td>Missing Garment</td>
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<td></td>
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<tr>
<td></td>
<td>Quality Issue</td>
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<td></td>
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<td></td>
<td>Missed Delivery</td>
<td></td>
<td></td>
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<tr>
<td>Claims</td>
<td>Retail</td>
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<tr>
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<td>Missing Garment</td>
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<td></td>
<td>Damaged Garment</td>
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<td>Wrong Garment</td>
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<tr>
<td>Route</td>
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<td></td>
<td>Damaged Garment</td>
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<td></td>
<td>Wrong Garment</td>
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<td>Maintenance</td>
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<td>Paint</td>
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<td>Furnishings</td>
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<td>Van</td>
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<td></td>
<td>Oil Change</td>
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<tr>
<td></td>
<td>Tire Rotation</td>
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</tbody>
</table>

<table>
<thead>
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<th>Option 2</th>
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<th>Type</th>
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<td>Missing Garment</td>
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<td>Maintenance</td>
<td>Truck</td>
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<td>Tire Rotation</td>
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<td>Minor Repair</td>
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<tr>
<td></td>
<td>Furnishings</td>
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</tbody>
</table>
Company Settings

Note: You may choose to import configuration option 1 as shown above using the “Import” option available in Issue Manager. Importing these settings will provide a basic configuration that may be modified as needed with the processes outlined below. To download the configuration file from our website visit http://spotpos.com/documents.aspx?id=65.

You will need to make changes in your Company settings that will affect your entire enterprise. Start to configure Issue Manager by going to Home Screen > Setup > Program Configuration > Company Settings > Issue Manager Settings > Edit. You will be displayed this manager setup screen as noted below.

![Issue Manager Setup](image)

This setup screen shows you the use of Issue Types and the hierarchy used for configuration. Notice you have Services, Category and types in the list to the left highlighted box.

**Issue Types:**

- **Services**: Customer Service and Maintenance
- **Category**: Retail, Call Center, Delivery Service, Claim, Maintenance
- **Type**: Positive Attitude, Bad Attitude, Poorly Dressed, Did not follow up.

These 3 item types are what make up the structure of the issue manager. These must be defined before you use this feature. It is suggested that you spend time in mapping out what you want you would like to track and report. It is suggested you make this structure on paper before creating items. (the use of the default settings will provide you with a good baseline for use and customization)
Issue Actions:

This is a collection of actions that may be performed on any issue. This is a general list and will be used at the item level to customize the required steps to complete an issue.
Action Sequence:

Action sequences are based on a “Type”. Each type will have its own unique action sequence associated that will give directions to the CSR, manager or owner to the proper resolution and tracking of the issue. Notice you have days to complete for tracking and time estimates for an open issue. This is used for tracking process times and for reporting.

Lists:

Lists are populated with default data that should be sufficient for use in your system. You may choose to modify these lists at any time. These lists include Customer satisfaction, Garment type, Responsibility, Status and Priorities.

Create New Configuration Items

To use the Issue Manager you will need to create services, Category and Items. Follow the steps below to configure Issue Manager for use.

1- Select the “Add Service” button and complete the form with a name and description.
2. Once the Service of “Customer Service” is created select the item and press the “Add Category” button and create a new category.

3. Once the Category is created you will select the Category and select “Add Type”. Create a Type of Quality as noted below.
4 - Now that the Issue “Type” has been created you will now create Issue actions. We will now create the issues actions you placed in the instructions section of the “Issue Type”. On the “Issue Actions” section select the “Add Actions” button to create your first action.

**Name:** This is the name or description of the action. Be specific because this can be used later by other item action sequences.

**Initial Status:** This is not currently supported

**Notify Customer:** This is not currently supported

**Notify Manager:** This is not currently supported

**Days to Complete:** This is not currently supported
**Instructions:** This is a descriptive list of what processes happen to complete this action item and will be displayed to the user/owner of the action item.

Create the remainder of the Issue actions you documented in the “Type” instructions list. Once this complete your screen should look like the following.

5 – Create the Action Sequences required for your Item. Remember that the Action Sequence is going to become the forced process required to complete the opened issue. You will need to select the “Item Type” from the list in order to configure your “Action Sequence”. Select the Issue action and then “Drag” the “Issue Action” to the “Action Sequence” window and then modify the “Days to Complete” for the item.
Notice the selection above and the “Move Up / Move Down” button. This will allow you to arrange the actions in the order they need to appear. If you dragged them from the list in the incorrect order you will now be able to arrange them in the order they are to be processed.

6- Select the “OK” button to accept these settings and then the “Save” button to save these configuration settings.

7- Congratulations, you are now ready to create your first issue manager item for a customer as noted in the use section of this document.
Orphaned Garments

Overview

Orphaned garment tracking was created to assist in tracking and centralizing orphaned garments in your operation. An orphaned garment would be a garment you have in your plant that has no tag, HSL, ItemTrac or searchable attribute in your system. An example would be a garment that was processed without a tag, a tag that fell off during processing and the garment was not found using a garment search in SPOT. More than likely this item was not detailed and was placed in production or was detailed in correctly.

The garments generally end up in a manager's office or an “unknown” z rack on the production floor. In the past you would have a customer call with a missing garment and have to look at this “unknown” rail or go to the manager’s office to look for a garment matching this description. With the orphaned garment process you can simply do a detailed search for all garments that have been reported and logged. With the orphaned garment feature your entire enterprise has access to these garments from any location.

Configuration

Orphaned Garment configuration requires the creation of the “Orphaned Garment Resolution” and “Garment Types” list. This list can be found and updated using the Issue Manager Configuration screen shown below.

How to use

Access to the Orphaned Garments feature is accessed via Search > Garment Search > Orphans as shown below.
Once the “Orphans” tab is selected from the garment search screen you will display the current Orphaned garments created and open in your system.

You have several options on this screen.

**Add Orphaned:** This option allows you to create a new garment to be tracked in your operation. It is suggested that you create the garment with as much accurate detail as possible. The more details you add today the easier it is to find the garment later in a search. Details such as color, type, size, brand etc. are available to describe the garment.
**View Details**: You may select any item displayed on the screen and either “double click” or select the “view Detail” button located on the screen. This will display the details of the garment.
**Begin a New Search**: Using the search feature will allow you to find any garment using any of the collected details of an item. Most popular search items would be brand, color and type.

**Resolution**: Once you have created a new garment and it is returned to the owner, given to charity or removed from your orphaned inventory you will want to use the resolution. The default resolutions are available on the detail screen of the item.

**Issue Manager Integration**: If you are using the Issue Manager feature found in SPOT you are able to create and link an orphaned garment to the issue. You will simply use the “Garment Details” button when creating the garment found in the issue.

You may also use the “Match Orphan” from the issue manager screen. This will allow you to search the current orphaned list to verify the garment is not already being tracked in your system.
Assisted Assembly

Overview
Assisted Assembly is a tool that will save you labor, cut down on misassembled orders and allow your production to flow smoothly. Assisted Assembly will require your operation to use ItemTrac barcodes. ItemTrac barcodes may be permanent HSL labels or temporary printed/bar printed barcodes. Each item must have a unique barcode/ItemTrac ID in order to use Assisted Assembly.

Your assembly department will no longer have the laborious task of searching for tags and matching with invoice, lot or customer number.

You have several configuration options to modify the process while using the tool. These options consist of printing invoice before or after orders are completed, auto splitting orders as items are scanned and the printing of invoice alerts at the time invoices are completed.

Configuration
The use of Assisted Assembly will require several configuration settings as noted below. These setting are based on the setup of the assembly process and not the configuration of ItemTrac barcodes.

Company Setting
1. Navigate to the Home Page > Setup > Program Configuration > Company Settings > Workflow Settings
2. Modify your current “Assembly” Process step or create a new one
3. Modify the setting as noted below
4. Save Settings

Store Setting
1. Navigate to the Home Page > Setup > Program Configuration > Store Settings > Process Step Settings > Assembly Profiles
2. Create an assembly profile for each bay you would like to define. Use a unique name for each bay created. You may call it “Bay 1”, “Assembly 1” etc. The example below shows “LD” and “DC”.
   a. **Assemble By** - Define how you would like to assemble your orders by enforcing rules as to what may be in the bay at any one time. Most customers will use either “No Filter” or “Department”. By department will use the first department scanned to a bay as the filter.
   b. **Beginning Position** – This is the starting slot in this bay. Start with 1 in most cases. If you have multiple bays it is a good idea to start the second bay with a unique number sequence. Start with 1 in bay 1 and 100 in bay 2.
   c. **Last Position** – This is the last slot in this bay.
   d. **Fast Load** – Option that will speed up the scanning results by not loading the visual invoice. To load the visual invoice simply select invoice from the “Processing” column and the visual invoice will then populate.
e. **Print Invoice At Assembly** – If this is checked, the invoice will print on the 1st piece. If used in conjunction with the “Auto Split Qty > 0” the invoice will print on the last piece of the order rather than the first item of an order.

f. **Auto Split Qty** – This setting works with the “Print Invoice at Assembly” setting. This will take the first x pieces of an order and auto split them as they pass through the assembly bay. For example, you may have a 10 piece order and this setting is set to 4. The first 4 items that are scanned to the assembly bay will split and complete a new order and will be removed from the bay. The next 4 items scanned will split to an order and the remaining 2 items scanned are split to the 3rd and final invoice for the 10 pieces.

g. **Save Settings**

**Work Station Settings**

1. Navigate to the Home Page > Setup > Program Configuration > Workstation Settings > Process Step Settings > Select your “Assisted Assembly Profile” to be associated with this workstation.

2. Navigate to Workstation Settings > Report Settings > Printer Assignments > Assembly Invoice and select the correct printer and invoice template you want used when printing invoices at the assembly station.

3. Save Settings

**How to Use**

1. From the “Home Screen” Workflow Steps > Select Assembly

**Multi Piece Order**

1. Scan your first garment barcode

   ![Image](image_url)

   a. Notice that the screen updates with the color “Blue” and displays “Item Found”, a large 1, a small 1 of 2 and depending on how you have your system configured the invoice may print.

   b. The large one on the screen indicates that the garment needs to be placed in location 1 of your assembly bay.

   c. The 1 of 2 displays this order has 2 pieces and this is the first of the 2 pieces.

   d. The visual invoice updates with the customer name, invoice number, and items belonging to the invoice. Items that have a **green color** have been scanned into the Assembly bay. Items which are **blue** have not been scanned. You can use the mouse to scroll up and down throughout the invoice.

   e. The Processing column updates with the orders that are currently in the assembly bay and shows the pieces hanging for each rack location and invoice hanging in that location. By selecting one of the lines items in this column the visual invoice will update with the details of items on the order and displaying what is hanging and what is not in the assembly bay for this invoice.

   f. Standard SPOT conventions also apply here. For example, select the Order View button and you will bring up the Order View screen. Here you may reprint invoice. The history button will bring up the history of this order.
2. Once all of the items for a particular location have been scanned, SPOT will identify this as COMPLETED, by turning the screen green, and status show as ASSEMBLED. Remove the invoice and the items from the location and send to the bagging process. This now frees this location. The next new invoice will be assigned to the first available position.

**Single Piece Order**

1. Scan your first garment barcode

![Image](image1.png)

a. Notice that the screen updates with the color “Yellow” and immediately turns green and then displays “New Invoice”, a large 1, and depending on how you have your system configured the invoice may print.

b. The yellow indicates that the order is complete and is a 1 piece order and is ready for bagging.

**Errors and Exceptions**

_**No Invoices / Item Not Found**_

If a ItemTrac ID barcode is scanned and is not recognized by SPOT you will see the following “No Invoices” message. This message indicates that the item barcode is either

- Item has not been defined as an item at detail
- Item is not in a “detailed” status
- Barcode reader has read the barcode incorrectly
- You have your system configured to expect an invoice scan to initiate the assembly process.
Positions Full
If an ItemTrac ID is scanned you have no more open / available slots in your assembly bay you will see the following “Position Full” message on your display. You will need to put the item to the side and scan them again at a later time when slots in the bay are available.

Split items from Invoice
Any orders that are not completed in the assembly process may be split. To split the ready items high light and invoice and select “Split Remaining Pieces” button located at the bottom of the screen as shown below. Using this option the completed items will split and use the original invoice number, update piece counts on the invoice, print the invoice and complete the split orders and release the slot. The remaining in process items from this invoice will create a new invoice as they are scanned into the assembly bay.
Remove Invoice / Items from Assembly Bay

In order to modify, void, Re-do an item, change promised date, etc, it will be necessary to remove the invoice from the Assembly Bay. Once you remove an invoice from the slot please be sure to remove items and the invoice from the bay.

1. Scan the Invoice and you see a message (in Red) to Rescan=Cancel

2. Rescan the Invoice again

3. The Invoice and all items are now removed from the Assembly Bay. If the order is not complete you will need to either manually assemble the order or scan the items back to the assembly bay for assembly. If you remove an order from the bay make certain you control the order and its pieces so this order does not become assembled as incomplete.

Search/Lookup Information

In Process Orders – Orders with items scanned and located in the assembly bay will display “Position XX-Start” in the search/lookup screen as shown below.
Completed Orders - Orders with items scanned completed and removed from the assembly bay will display “Position XX-Complete” in the search/lookup screen as shown below.

Do’s and Don’ts
Here is a quick list of items we have found to be important when implementing Assisted Assembly

- Do
  - Dedicate the proper space and resources to create your assembly bay as this will make the bay as efficient as possible locating items. Labor and efficiencies will not be as high with a “Thrown together” assembly bay.
    - Keep the bay short and double sided to reduce movement required to locate items
    - Scan garments in the bay and approx 20% of way from the end to reduce movement required to locate items. Be consistent with barcode placement for quick access in assembly
    - Locate a large monitor that will allow the user easy access for viewing.
    - Don’t place the monitor to high so that it fatigues the user during the day. It may be a convenient location to place the monitor but is it convenient for the user?
    - Mark each bay with large number so that the user does not have issues reading the number.
  - Depending on the number of garments you may want to create separate bay’s for shirts and dry cleaning.
  - Scan and locate one item at a time.
  - Leave enough room between slots so the user does not locate items in the wrong slot
  - Control your production with FIFO (first in first out) so that you do not fill your bay with incomplete orders that are waiting for the straggling pieces in production.
Review your current orders in assembly and split orders that have special attention items so that they do not hold slots for the entire day waiting on a special item.

Purchase a good hand held scanner that will be efficient with scanning ItemTrac barcodes and does not require cradling with each scan.

- Don't
  - Don't use a single sided assembly bay as it drastically increases the space
  - Don't use a scanner with a chord that caused the user to trip on the chord or requires the scanner to be cradled after every scan.
  - Don't scan items outside the bay or at the very end of the bay as this greatly reduces the amount of movement to locate items.
  - Don't use small J-hooks that overlap in the bay. The user WILL place garments on these hooks that are close together.
Creating a Marketing Program

Overview
You will have to decide what is “Marketing”? With the declining dollars being brought into the industry you had better start thinking about marketing your company to current and perspective customers. If you don’t your competitors will. Many industry leaders insist price incentives will determine a successful program, other insists price is the last thing that should be on your mind when it comes to marketing. You must decide what your company needs and can support. Your marketing campaign may be as simple as a weekly welcome package sent to new customers, a thank you Email for all customers that have shopped this week, or can include mailers, Emails, coupons, promotions, charity programs or even frequent buyer or frequent flyer programs.

Whatever you call marketing will take your time in understanding, designing and implementing. If you are planning on a simple or complex marketing plan you will need to understand the cost and the return on your investment. Many people have gone over the top with outlandish plans for promotions and marketing only to create a complex system that is not in the budget for money or time spent to implement. In turn the plan fails and nothing is done. Create a plan and start slow by testing the waters and being consistent over a test period of time.

Time is limited for most owners and managers and the “thought of another task” is overwhelming. If you fit into this category you will probably fail in your marketing campaign. You will fail not because the campaign did not work but because it was never implemented as planned because of your time constraints. If you are seriously going to run a marketing campaign you will need to manage the campaign and put thought into implementation, cost and then measure the success of the campaign. If you do not have the time for all of these steps you will not be satisfied with the results and the return on investment.

A simple marketing plan may require you to purchase letter head and envelopes, others may require on line digital printing, pre printed coupons or announcements. Whatever the campaign make sure you can cost justify the capital investment you are about to make and measure your return. Be flexible with the campaign and listen to customers and other industry leaders. You are not the only one “Marketing” your business.

Examples

New Customers
A new customer welcome campaign is very effective in giving your customers a good first impression. A simple and easy campaign for your new customers is as easy as using the “New Customer” mail merge option and our default “New Customer Welcome” letter or Email and you may choose to customize the “New Customer Welcome” letter / Email to fit your operations needs. You will need SPOT, Microsoft Word, Letterhead and #10 single or double windowed envelopes to complete this campaign. Letterhead and self addressed custom envelopes are optional but will give you a much greater impact on the customer and the cost of the custom letterhead will be returned many times over your marketing campaign.

Missing Customers
Sending a customer a reminder that you miss them is very powerful. You may choose to use the marketing summary reports to find those customer that have not been in since a given period that are currently out of their visit pattern. Run this on a weekly basis using a 5-10% out of frequency range and no more than 10 days out of their visit pattern for a very manageable campaign. Use the results to send them a predefined “We Miss You Letter” mail merge or Email. You may choose to customize the letter to your business needs. You will need SPOT, Microsoft Word, Letterhead and #10 single or double windowed envelopes to complete this campaign. Letterhead and self addressed custom envelopes are optional but will give you a much greater impact on the customer and the cost of the custom letterhead will be returned many times over your marketing campaign.

You will also want to call a random selection of these missing customers to verify why they are missing. It has been proven by many customers that you may have a problem with employees, packaging or location that may not be resolved with a “We Miss You” letter or coupon. Before you send any marketing to your
missing customers it is suggested you call a random sample and verify why they are leaving. You may not need to give away discounts to get these customers back into a normal shopping pattern at your location.

**Frequent Buyer**

Reward your customers with a frequent buyers program. SPOT will allow you to generate a coupon based on customer spending habits. This will reward the customer for spending a predefined amount in a given department/service. Examples are:

- $10 coupon good on the next visit for every $200 the customer spends in DryCleaning. This reward is given automatically at the time of pickup.
- $2 coupon good for 30 days for every $100 the customer spends in Laundry. This reward is given automatically at the time of pickup.
- 25% coupon good for 10 days for every $75 in House holds
- $5 cash credit given to the customer for every $100 spent in DryCleaning. This reward is given automatically at the time of pickup

**Marketing Pop-up**

Enable the marketing pop-up at both drop off and pickup at your front counter workstations. Take your best manager and your best counter clerk and incentivize them to manually hand out promotional materials to customers that have specific spending habits. Enable the marketing pop ups only for these clerks and track the usage of your coupons/incentives. Customers will spend money on non used services if they know you offer them.

**Marketing Incentives**

Define your incentive program to automatically generate coupons for those department groups that are not frequently used by a customer. These coupons will automatically print on a defined printer for a configured workstation. Your clerks will simply hand the printed incentive directly to the customer or attach the incentive to the order.

**A generic example could be:** If the customer spends at least ‘X’ amount of dollars within the last ‘X’ number of days the program will generate a pre-specified coupon based on the least used Department Group as an incentive for the customer.

**A specific example could be:** If the customer spends at least $75 within the last 90 days the program will generate a 40% off coupon for Households as an incentive for the customer.

**Marketing Incentives**

**Overview**

Marketing incentives are based upon the idea and issuance of a coupon to “Incentive” customers at the time of pickup. The concept is to incentivize customers to purchase department groups they are not currently purchasing. You have flexibility in configuration for incentives. You may want to incentivize a customer that has not purchased or rarely uses “Households” or “Leather” department groups. You may choose to incentivize your shirt laundry customers with a “DryCleaning” incentive.

Incentives are generated at the time of pickup. Logic is based on configuration for dollars spent by the customer over a period of time; least used department group and what coupon is to be generated. Incentives are generated and printed at pickup to your local or shared printer.

Examples of incentives are:

**A generic example could be:** If the customer spends at least ‘X’ amount of dollars within the last ‘X’ number of days the program will generate a pre-specified coupon based on the least used Department Group as an incentive for the customer.

**A specific example could be:** If the customer spends at least $75 within the last 90 days the program will generate a 40% off coupon for Households as an incentive for the customer.
**Configuration**

You will use Company, Store, Route and Workstation settings to configure and apply your Marketing Incentives options. You will create a profile for each incentive offered to your customers. This profile will be created at the company level and then assigned at the store or route level.

As mentioned Marketing Incentives are used and configured with an incentive profile. This profile is created in company settings and then applied to store and routes. You have control of how the incentive prints at the workstation level.

**Company Settings**

1- From the Home Screen Select Setup > Program Configuration > Marketing Incentives and create a new profile. In this example a profile of $10 Household has been created.

2- Once this profile has been named select the $10 Household incentive “Edit” button and view the profile configuration options.

3- On the definitions tab you will see several options for configuration that are affected by the customers visit and spending habits.
   a. **If the Customer Spends at Least:** This setting will be used to verify the customer has spent at least “x” dollars over a given time period. If the customer spends at least this defined amount the incentive will be generated
   b. **Within the Past:** This setting will look at a customer spending habits over the last “x” days or months.
4- As shown below on the right of your profile configuration screen you have additional configuration options. You will need to select the price table you would like the incentive to apply to. In this example the General Price table has been selected. Once the price table is selected you will see the department groups for the price table. From here you will provide the department groups that will be used to evaluate the incentive.

In the example below the Household department group is the only department group that has not been excluded from evaluation and will the department group to generate the defined “$10 off House Hold” items coupon. If a department group has the “Exclude” check mark they will not be evaluated in the least use department group logic.

5- The example above will generate an inventive for the customer at pickup with the following logic and order criteria.
   a. Has the customer spent at least $25 in sales over the past 6 months
   b. Does the customer have any House Hold items in his/her order pickup?
i. If the customer has no House Hold in the pickup session the coupon will be generated  
ii. If the customer has House Hold and House Hold has the least value of department groups at pickup the coupon will be generated.  
iii. If the customer has only Household at pickup the coupon will not be generated.

In your profile you may choose to configure a single department group or multiple department groups. The example below shows the DryCleaning, Household and Leather department groups will be used to calculate the incentive. With multiple department groups selected the incentive will be generated using the least used department group in the defined profile.

![Screenshot of a configuration interface]

**Store Settings**

Store setting will be used to apply your incentive profile. You may have a store that offers a $10 off coupon for household items and another store that offers $15 off household items. With the ability to apply the incentives profile by store you can monitor and quantify the usage of the incentive by comparing store to store and incentive to incentive.

You will use the following process to configure store settings.

1. Store Settings > Marketing Settings > Marketing Incentive Profiles
2- Select the incentive profile that you would like to be evaluated at pickup for this store and select the box and place a check mark.

**Route Settings**

You have one option for Marketing Incentives for routes, this to enable or disable the incentive profile by route. The route will inherit the stores profile. By default a route has the marketing incentives enabled. You will need to select the “Disable Marketing Incentives” option as shown below if you would like to disable incentives for a route customer.
Workstation Settings
Settings at the workstation will be used to enable or disable the printing of the incentive. Below you will find the Workstation > Marketing Settings > Marketing Incentives Printing option allows you to configure how the incentive will print.

**Never Print**: This will disable this workstation from printing marketing incentives.

**Always Print**: This will enable this workstation to always print marketing incentives.

**Prompt to Print**: This option will prompt the clerk to print the marketing incentives. The clerk will have the option to select a Yes / No at this workstation when an incentive is generated.
Workstation setting will also allow you to print your incentives to a specific printer on the workstation or on the local network. You will use the Report Settings > Printer Assignments > Incentives and configure the printer you would like the incentive to print.

Summary
Using incentives will generate coupons so be sure to setup your coupons so that generate the proper discounts and incentives for your customers. As with any other coupons be constant with coupon naming and reporting so that you are able to track incentive generated coupons. For instance do not use a generic $10 off coupon for over the counter, advertised special and incentives as this will not allow you to track the results when using incentives for your customers.
Retention Marketing

Overview
SPOT has advanced retention marketing features ready for your business to take advantage of. These features will allow you to keep on top of customer trends, allowing you to know when a customer is out of his or her spending habits. You have the ability to look at reports, generate Word Merge, mail merge and Email merge documents and mailing labels.

Configuration
Retention Marketing uses data stored in the data base to calculate and track patterns and habits of customers. This data is not part of the standard or default installation. You will need to make several changes to configuration settings in order for the reports to work properly. This document does not cover the use of the entire configuration tool. This was covered earlier in this document. Configuration changes required will be discussed in the following section. All configuration changes will be made using Company settings.

Company Settings
Marketing Settings
These settings must be created and then applied to each item in the price table. The categories below are used in many of the reports that we will discuss later in this chapter.

Production Categories – Item will report to what production category. These are definable by you and may include the production category types:

- LD – Laundry
- DC – DryCleaning
- HH – House Hold
- ML – Miscellaneous Laundry
- LT - Leather

Service Type Categories – Item will report to what service type. These are definable by you and may include the service types:

- Core – Standard services for your store / plant. This would include all DC and LD items.
- Add-on – Services that are considered add-ons to your store / plant. This may include leather, shoes, alterations etc.
**Bonus** – This may include hand wash or restoration.

**Gender Categories** – Item will report to what gender type. These are definable by you and may include the gender types:

- Male
- Female
- Un-specified

**Custom Categories** – Item will report to what custom type. These are definable by you and may include the custom category types:

- Water Repel
- Shoes
- Hand wash
- Alterations

**Mark-in Settings / Price Table**
Each Department, Category or Item in your price table is required to have the following fields assigned for many of your marketing reports. You may choose to apply settings at the Department, Category or Item level. You place settings at the Department level and have them inherited to the Category and Item level. If you make changes at any level the lowest level will be inherited. These items may be changed at any time. Any existing items will report to the originally saved marketing category.

**Department**
- **Marketing Category**
- **Production** – Select from defined list of categories
- **Service Type** – Select from defined list of categories
- **Gender** – Select from defined list of categories
- **Custom** - Select from defined list of categories

**Category**
- **Marketing Category**
- **Production** – Select from defined list of categories
- **Service Type** – Select from defined list of categories
- **Gender** – Select from defined list of categories
- **Custom** - Select from defined list of categories
Item

Marketing Category
  Production – Select from defined list of categories
  Service Type – Select from defined list of categories
  Gender – Select from defined list of categories
  Custom - Select from defined list of categories

Report Details
The reports listed below are available in the Report Gallery under Marketing.

Configuration Options
Logic used to evaluate and compute a missing visit may be configured to meet your company's needs. Setting found in Company Settings > Marketing Settings > Report setting control the logic used for this and other marketing reports. Each value is used to calculate a customer's "out of pattern" status.
“Out of Pattern – Next Visit Threshold” – This value is used to determine what percentage of a customer’s visit pattern is considered to be “out of pattern”. This percentage is used along with the customer’s calculated days between visits. The default settings displayed below show 25 or 25% of a visit. If we use an example customer that has a calculated 100 days between visits, 25% would consider the customer to be out of pattern after 125 days from his last visit.

“Out of Pattern – Next Visit Minimum” - This value is used to determine the minimum number of days a customer’s visit pattern is considered to be “out of pattern”. This number is used along with the customer’s calculated days between visits. The default settings displayed below show 14 days. If we use an example customer that has a calculated 100 days between visits, 14 days would consider the customer to be out of pattern after 114 days from his last visit.

What setting is used? – When visit days are calculated using these configuration options the larger number of days calculated is used to calculate the customer’s “out of pattern” days. You may review the examples below for details on how these setting are used in “out of pattern” calculations.

Example A – A customer has 100 days calculated between visits.

Next Visit Threshold = 25
100 days x 25% = 25 days or 125 days to be considered out of pattern
Next Visit Minimum = 14
100 days + 14 days = 114 days to be considered out of pattern
The customer would be considered out of pattern at 125 days.

Example B - A customer has 14 days calculated between visits.

Next Visit Threshold = 25
14 days x 25% = 3.5 days + 14 days = 17.5 days to be considered out of pattern
Next Visit Minimum = 14
14 days + 14 days = 28 days to be considered out of pattern
The customer would be considered out of pattern at 28 days as this is the larger of the two calculations.

Example C - A customer has 100 days calculated between visits.

Next Visit Threshold = 15
100 days x 15% = 15 days + 100 days = 115 days to be considered out of pattern
Next Visit Minimum = 7
100 days + 7 days = 107 days to be considered out of pattern
The customer would be considered out of pattern at 115 days as this is the larger of the two calculations.
In summary the settings may be modified to determine your needs as determined by the average customers visit pattern.

**Detailed Logic Used to Calculate a Missing Visit**

This will explain the logic used in calculating “Average Days Between Visits”, “Next Visit” and “Missing Visit”. Calculations of 25% and 14 days are configures in settings as noted above.

For a 12 month period, gets distinct invoice “InitialVisitDays”

Visits = Count # of days visited  
TotalDays = Total # of days between each visit  

AvgDaysBetweenVisits = Divide to get average days between visits  

NextVisit = LastVisit + AvgDaysBetweenVisits  
LateDays = AvgDaysBetweenVisits * threshold pct (config), not to be less than min (config)  
(50 days between visits * 25% = 13 days, is less than the minimum of 14 so LateDays becomes 14 days)  

LateVisit = NextVisit + LateDays  

IF LateVisit is within the report period, the customer will display on the report.

Example Customer:

Report Date range selected is June 12 - 18  
Sample customer data  
First = 4/18/2011, Last = 4/23/2011, Next 6/1/2011. DaysBetweenVisit = 9, but threshold forces the “Late Visit” to be 14 days after his last visit, which is 6/15/2011. The next estimated visit date falls in the range of the report and customer is displayed on the report.

**Marketing Summary**

The idea behind the marketing summary is to allow you to view customer and sales information for a definable “Current” period and compare it to a “Previous” period and compare it to “Same Period Last Year”. An example of the report is to look at a period starting today and the previous 30 days. At the time you run this report you select a starting period, number of days to include in the current period, stores and routes you want to include in the report.

The selection criteria are shown below.
Selecting the criteria as noted will report starting June 10th back thirty days for the current period. This selection creates May 10th to June 10th as “Current Period”, April 9th to May 9th as “Previous Period”, May 10th to June 10th 2003 as “Same Period Last Year”. The last selection option on this screen is the “Gold Customer” Threshold. This number is based on sales dollars for the current period. The sample above will show only customers with sales greater than $20 in the defined “Current” period of May 10th to June 10th. The following sample report uses the above selection criteria below shows details of what is included in this report.
**Customer/Retention Summary**

**Closing Date:** 6/10/2004  
**Period:** 30 Days, Gold Customer: Sales > $20.00

### My DryCleaner #1

#### All Customers

<table>
<thead>
<tr>
<th></th>
<th>Current</th>
<th>Previous</th>
<th>S.P.L.Y.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lost Customers</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Average Pieces / Lost Customer</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Average Sales / Lost Customer</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>New Customers Signed Up</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>New Customers with Activity</td>
<td>1</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Average Pieces / New Customer</td>
<td>5</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Average Sales / New Customer</td>
<td>215.00</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Gold Customers (# / %)</td>
<td>1 / 33%</td>
<td>1 / 00%</td>
<td>0 / -</td>
</tr>
<tr>
<td>Average Pieces / Gold Customer</td>
<td>27</td>
<td>24</td>
<td>-</td>
</tr>
<tr>
<td>Average Sales / Gold Customer</td>
<td>208.25</td>
<td>%6.22</td>
<td>-</td>
</tr>
<tr>
<td>All Customers with Activity</td>
<td>6</td>
<td>1</td>
<td>0</td>
</tr>
<tr>
<td>Average Pieces / Customer</td>
<td>14</td>
<td>24</td>
<td>-</td>
</tr>
<tr>
<td>Average Sales / Customer</td>
<td>74.12</td>
<td>%6.22</td>
<td>-</td>
</tr>
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</table>

--- Production Summaries ---

<table>
<thead>
<tr>
<th>Production</th>
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</tr>
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<tbody>
<tr>
<td>DC</td>
<td>42%</td>
<td>86%</td>
<td>0%</td>
</tr>
<tr>
<td>HH</td>
<td>54%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>LD</td>
<td>4%</td>
<td>14%</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Service Type</th>
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</tr>
</thead>
<tbody>
<tr>
<td>Add-On</td>
<td>24%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Core</td>
<td>76%</td>
<td>100%</td>
<td>0%</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>22%</td>
<td>00%</td>
<td>0%</td>
</tr>
<tr>
<td>Un-Specified</td>
<td>24%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Womens</td>
<td>54%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Custom</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Shoes</td>
<td>17%</td>
<td>86%</td>
<td>0%</td>
</tr>
<tr>
<td>Test</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>U-charge</td>
<td>4%</td>
<td>14%</td>
<td>0%</td>
</tr>
<tr>
<td>Water Repel</td>
<td>0%</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Unspecified</td>
<td>79%</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

---

**Lost Customer** – Number of customers that visited the previous period that did not visit the current period

**New Customer Sign Up** – Number of customer that are new during the period

**Gold Customers (#/%)** – The example shows there are 2 Gold customers meeting the “Gold” criteria selected in the previous selection screen and they make up 33% of all customers that visited in this period.

**All Customers with Activity** – Displays the number of customers that have visited the store during the defined periods.

**Production** – This is the percentage of sales of each items defined Marketing Category as defined by Production, Service Type, Gender or Custom.

**Marketing Summary Detail – Gold Customer**

This report uses the same selection criteria as the Marketing Summary report and allows you to view only the Gold customers. The idea of this report is to duplicate the Gold customers found on your Marketing Summary.
report. With this list of customers you may print to a report, Word Merge to the “Valued Customer.doc” letter, Email Merge to “Valued Customer.htm” or export to a mail merge file.

**Marketing Summary Detail – Lost Customer**

This report uses the same selection criteria as the Marketing Summary report and allows you to view only the "Lost Customers". The idea of this report is to duplicate the Lost Customers found on your Marketing Summary report. With this list of customers you may print to a report, Word Merge to the “We Miss you.doc” letter, Email Merge to “We Miss you.htm” or export to a mail merge file.

**Marketing Summary Detail – New Customer**

This report uses the same selection criteria as the Marketing Summary report and allows you to view only the "New Customers". The idea of this report is to duplicate the New Customers found on your Marketing Summary report. With this list of customers you may print to a report, Word Merge to the “New Customer.doc” letter, Email Merge to “New Customer.htm” or export to a mail merge file.

**Out of Pattern – Marketing Category**

This report will show all customers that are currently out of pattern in both spending and Production Category purchase habits. The report reflects the current spending trend of your customers by Store, Route and Production Category.

Selection criteria for this report are explained below.

Select Group – You may choose to select this report on Production, Services Type, Gender or Custom marketing groups.

Select Category - Once a Group is selected you may report on any defined Category for the service.

Evaluation Date – This is the starting date for the report. This date will be used as the first date of the evaluation period minus the Evaluation Period.

Select Evaluation Period – This is the period of time you would like to report on. If you want to view customers who are out of trend in the last week you will use “Last 7 days”. To view those customers out of pattern in the last 4 weeks you would use “Last 28 Days”.

![Image of select options and evaluation date](image)
12M Minimum Sales – Select the total amount of sales over the past 12 months a customer will require in order to be reported on. Each time you select a different 12M sales number you will return a different set of customers in this report.

Sample Out of Pattern-By Category

<table>
<thead>
<tr>
<th>1 Mon-Th</th>
</tr>
</thead>
<tbody>
<tr>
<td>DC</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Brown, Jim</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2</th>
</tr>
</thead>
<tbody>
<tr>
<td>LD</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Brown, Jim</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Counter</th>
</tr>
</thead>
<tbody>
<tr>
<td>DC</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Benson, Brooke</td>
</tr>
<tr>
<td>Customer, Test</td>
</tr>
<tr>
<td>Jones, Nat.</td>
</tr>
<tr>
<td>Jones, Jane</td>
</tr>
</tbody>
</table>

The report will show the customer’s first visit, last visit and % usage of Production Category, last 12 months sales, visits and pieces. The % Decline column reflects the percentage of sales a customer has decreased in sales for the period specified.

Out of Pattern – Visit

This report will show all customers that are currently out of pattern for visits to your store. The report reflects the current spending and more importantly the visit trend of your customers by Store, Route and Production Category.

Selection criteria for this report are explained below.
Select Group – You may choose to select this report on Production, Services Type, Gender or Custom marketing groups.

Select Category - Once a Group is selected you may report on any defined Category for the service.

Evaluation Date – This is the starting date for the report. This date will be used as the first date of the evaluation period minus the Evaluation Period

Select Evaluation Period – This is the period of time you would like to report on. If you want to view customers who are out of trend in the last week you will use “Last 7 days”. To view those customers out of pattern in the last 4 weeks you would use “Last 28 Days”.

12M Minimum Sales – Select the total amount of sales over the past 12 months a customer will require in order to be reported on. Each time you select a different 12M sales number you will return a different set of customers in this report.
Sample Out of Pattern – Visit

This report will display those customers that are missing out of pattern based on previous visit history.

**My Drycleaner**

**Out of Pattern - Visit**

<table>
<thead>
<tr>
<th>Counter</th>
<th>Ph</th>
<th>First Visit</th>
<th>Last Visit</th>
<th>Last Pickup</th>
<th>Next Visit</th>
<th>Days Late</th>
<th>Days Late</th>
<th>Days Late</th>
<th>Sales ($24)</th>
<th>Fox ($12)</th>
<th>Visits ($12)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jones, Todd</td>
<td>[81] 231-222</td>
<td>02/07/04</td>
<td>12/23/04</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>John, III</td>
<td>[81] 123-456</td>
<td>02/05/06</td>
<td>12/23/06</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mary, Jr.</td>
<td>[81] 456-654</td>
<td>02/07/07</td>
<td>12/23/07</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<table>
<thead>
<tr>
<th>Route 1</th>
<th>Customer</th>
<th>Ph</th>
<th>First Visit</th>
<th>Last Visit</th>
<th>Last Pickup</th>
<th>Next Visit</th>
<th>Days Late</th>
<th>Days Late</th>
<th>Days Late</th>
<th>Sales ($24)</th>
<th>Fox ($12)</th>
<th>Visits ($12)</th>
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<tr>
<td>Jones, Todd</td>
<td>[81] 231-222</td>
<td>02/07/04</td>
<td>12/23/04</td>
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</tr>
<tr>
<td>John, III</td>
<td>[81] 123-456</td>
<td>02/05/06</td>
<td>12/23/06</td>
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</tr>
<tr>
<td>Mary, Jr.</td>
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<td>02/07/07</td>
<td>12/23/07</td>
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</table>

<table>
<thead>
<tr>
<th>Route 2</th>
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<th>Last Visit</th>
<th>Last Pickup</th>
<th>Next Visit</th>
<th>Days Late</th>
<th>Days Late</th>
<th>Days Late</th>
<th>Sales ($24)</th>
<th>Fox ($12)</th>
<th>Visits ($12)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jones, Bob</td>
<td>[81] 322-444</td>
<td>02/07/04</td>
<td>12/23/04</td>
<td></td>
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<tr>
<td>John, III</td>
<td>[81] 123-456</td>
<td>02/05/06</td>
<td>12/23/06</td>
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<tr>
<td>Mary, Jr.</td>
<td>[81] 456-654</td>
<td>02/07/07</td>
<td>12/23/07</td>
<td></td>
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</tbody>
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<table>
<thead>
<tr>
<th>Route 3</th>
<th>Customer</th>
<th>Ph</th>
<th>First Visit</th>
<th>Last Visit</th>
<th>Last Pickup</th>
<th>Next Visit</th>
<th>Days Late</th>
<th>Days Late</th>
<th>Days Late</th>
<th>Sales ($24)</th>
<th>Fox ($12)</th>
<th>Visits ($12)</th>
</tr>
</thead>
<tbody>
<tr>
<td>John, Bob</td>
<td>[81] 322-444</td>
<td>02/07/04</td>
<td>12/23/04</td>
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<td>02/05/06</td>
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<tr>
<td>Mary, Jr.</td>
<td>[81] 456-654</td>
<td>02/07/07</td>
<td>12/23/07</td>
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</tbody>
</table>

Services by Marketing Group

Select Group – You may choose to select this report on Production, Services Type, Gender or Custom marketing groups.

Select Category - Once a Group is selected you may report on any defined Category for the service.

Start Date – This is the starting date for the report.

End Date – This is the Ending date for the report.

12M Minimum Sales – Select the total amount of sales over the past 12 months a customer will require in order to be reported on. Each time you select a different 12M sales number you will return a different set of customers in this report.
This report will display Production Department usage and % for all customers by store and route using the selection criteria as noted.

**Customer Initial Activity**

This report will allow you to view a customer's initial visit information. You will find the customer's first, second and third visit date and visit dollar amounts. This will allow you to see trends on customer's first visits and any subsequent visits. Many customers have been lost because the first experience in your stores. You may want to look at this report for a very specific time period and make phone calls to these customers to see why they have only made one or two visits. This report could also be exported to Excel and sorted by number of visits and then used in a mail merge.
Lost Tuna Report

This report will return a list of customers that have not been in for “X” days and had a minimum of “X” dollars spent for a specified period of time. Example: What customers have not been in since 1-1-03 and have spent at least $50 10-1-02 to 12-31-02.

Running the report

1 - Select an Inactive date for a customer
2- Select a date range of sales to evaluate.

3- Select a Minimum order amount for the period.
Route Trend Report
Displays the customer-purchasing history in a 52-week history format for a selected route. A "3" indicates a week falling within 80%-120% of the customer’s median sales for the 52 weeks reported. "1" = 1%-40%; "2"=40%-80%; "4"=120%-160%; "5"= 160%+

Marketing Pup-Up
The marketing pop-up feature will allow you to review in a single screen many key data points about your customer. You will see current spending trends by department, 12 month visit information and retention marketing visit trends. You can use this information to assist in establishing customer value and real-time evaluation for clerk interactive promotions using least used departments. You can access a customer “Marketing Popup” screen from any customers profile using the “Marketing Popup” button as shown below.
Once you select the “Marketing Popup” button you will see the following screen:

You will notice the following features in this screen:

**Pie Chart** – Shows you the percentage of sales by department for the customer. By selecting the production button just below the pie chart will allow you to review information on services, gender and customer attributes you have configured in your marketing setup.

**Statistics** – Shows you details on rating, visit totals and average sales figures over the last 12 months.
**Next Visit** – Calculates the current visit frequency for the customer and displays the current trend including the estimated next visit for the customer. You will also see the number of days until the next estimated visit all based on the customers current visit patterns. You may also see this information in Red indicating that the customer is out of pattern for visits. When this information is in red it will also inform you the number of visits the customer is out of pattern.

**Update Your Existing Data**

It may be required to update existing invoice information in order for it work with the new marketing reports and marketing pop up. You may have noticed that the marketing pop up shows some or all history for a customer as “Unspecified”. This is because SPOT requires information at the invoice / Item level that was not available in previous versions. It is a simple and quick process to update this existing data. You will need to run `c:\program files\sbs\spsystem\sputilities.exe` to update invoices created in SPOT with builds prior to build 4.1.0003. This update will create the needed marketing information for each invoice. If you choose not to run this process it will cause no harm, you will just see customers with the unspecified departments on the marketing tab.

**Warning:** This utility may take 60 minutes or more to complete on large databases. Plan on running this utility after hours or on a station that will not be needed during the time the utility is updating records.

**Step 1** - Login to SPOT by supplying the following information on the SPOTUtilities Login tab.

```
Server:
Account:
Workstation Name:
```

This information can be obtained from the “F1/Menu” option on the Home Page in builds 4.10.0035 or higher. If you do not know these file names or have build 4.10.0035 please call tech support and they can assist you with acquiring the information on these fields.

Once the information is entered press the “Login” button on this screen. You will be notified of a valid login.

**Step 2** - Select the “Invoices” tab

**Step 3** - Select the “Update Invoice Item Marketing Fields” option on this screen.
You will be provided with an indicator to how many records have been updated. If your database is large this could take upwards of 60 minutes or more. Once this utility starts you must be patient and allow it to finish.

Once the utility finishes close it by using the “X” in the upper right hand corner of the window. Randomly select customers to verify that the data has been populated correctly by viewing the marketing tab for a customer with older invoices or by running any one of the retention marketing reports. Verify that all customer stats are reflecting current configurations and not the “Non-specified” as before.
Coupon Configuration

Overview

Coupons and promotions are a very powerful feature. A coupon may be defined and applied to a single order or to an entire visit. Visit association is used to update all new or existing orders in the visit. If you choose not to use coupons over the visit you will need to change your “Visit” association off. Coupons have the ability to be configured with 6 different types, ranging from $5.00 off, 10% off or as a complicated as bring in 5 suites get a shirt free, bring in 5 pillows get the next 3 for $2.00.

A promotion is the “intelligent” application of coupons. This allows you to associate a customer with a promotion and “intelligently” apply coupons over a number of days, visits, weeks etc. Rules defined at the promotion level will allow you to apply coupons with a wide variety of options.

This section is provided to give you an overview of coupons and promotions. You will want to test all of your configuration changes in coupons and promotions to make sure values expected are being applied. SBS takes no responsibility for the improper use of these options.

Configuration

Configuration for coupons is accessed via the setup utility at Company Settings > Markin Settings > Coupons. As in the sample below you can see a number of different coupons defined.
Details
Once you have navigated to the Company Setting > Markin Settings > Coupons you will then select an existing coupon to see the following screen.

Name – Name used for the Coupon. Be selective on what you use here. This will print on reports, quick’s and invoices.

Settings – Tool used to configure the usage and value of the coupon. (See section below)

Coupon Barcode – If barcode value is saved here, the user may scan the coupon barcode as an alternative way of adding the coupon to the invoice at markin. If the “Scan Selection” checkbox is selected within the Settings screen for this coupon, the coupon may ONLY be selected via barcode scan (thus ensuring the customer has the coupon physically with them).

Validated Prefix Only - If Yes, and a tender is defined as requiring a barcode, the Coupon Barcode value defined is interpreted to be a prefix, and only the beginning portion of the scanned barcode will be required to match the Coupon Barcode setting.

Coupon Types
Once the Settings option is set you set the coupon type and definition. “Type” is used to define the behavior of the coupon. As you notice below you have the option of 6 different coupons. Each of these six has its own rules used at the time the coupon is applied to an order or visit. Each type has a description / example as shown below.
Price Table Options

Each coupon may be applicable to all items in your store or may be applicable only to certain items in your price table. All items are eligible for discounting if you have the “AllowDiscounts” setting enabled at the item level. You may choose the

If you choose to disable departments from coupon discounts you will select the price table from this pull down and select all departments that the coupon will apply. Those departments without a check mark are going to apply to the coupon value. In the example below the general price table is selected and the “Shirt Laundry” and “DryCleaning” department will be evaluated in the coupons value.
If you choose to have a Household coupon that is 10% off you will select only Household from this dropdown.

**Coupon Details**
Details allow you to tailor the usage of the coupon. Options are as follows

- **Pricing**
  - Include Upcharge’s – The coupon will apply to the value of any Upcharge’s on the invoice
  - Exclude Upcharge – The coupon will not apply to the value of any Upcharge’s on the invoice

- **Accept**
  - At Receive Only – Coupon may be applied only at the time the order is created.
  - At Pickup or Receive – Coupon may be applied at either order creation or at pickup.
  - Currently you have no override for either of these settings so be sure of how / when you want these coupons to apply.

Scan Selection – If this is enabled the only way for a clerk to apply the coupon is to scan the coupon. The coupon will be available in the coupon list but it will not be available for selection.

**Valid Dates and Times**
By default a coupon can be applied at any date or time. You may have a coupon that is only valid on “Tuesday”. Use this option to configure the day, date or time it is valid.
The example below limits the use of the coupon to “Tuesday” only. If the coupon is applied any other day than Tuesday the user will be notified that it is not valid.

Notice the option to expire on a specific date and time of day.

**Example Coupon**

The example below shows a type one coupon good for the general price tables Shirt Laundry and DryCleaning departments only. The coupon is valid for drop-off or pickup, includes Upcharge’s, may be applied manually or scanned and is only valid on Tuesday’s any time during the day.
Create “10% off up to $10.00” Coupon

Once you have navigated to the Company Setting > Markin Settings > Coupons you will then select the “Coupon” node. Follow the steps below to configure a simple type 1 or 2 coupon.

Step 1 – Right mouse click on the Coupon node and Select “Create New Coupons” or use the “Add” button at the Properties window.

Step 2 – Select “Type 1”

Step 3 – Select the “Definitions” tab along the top of the window.

Step 4 – Configure the “Get” to 10

Step 5 – Select Percent in the “Off” drop down

Step 6 – Place a check mark next to “Limit to a maximum of “

Step 7 – Place 10 in the “dollars” box

Step 8 – You should now have your coupon defined as the example below. Press “OK” to accept this coupon.
Step 9 – Assign any Price table options, details or valid date options as required.

Step 10 - Once this coupon is defined and you save the configuration users have the ability to apply this coupon to orders.

**Create “With 5 Suits receive $0.50 discount on up to 10 Laundered shirts” coupon**

This will create a coupon that will price up to 10 “Shirt Laundry” shirts at $0.50 off with the purchase of 5 “DryCleaning” Suits.

Coupon configuration will look like this.

Step 1 – Configure the coupon as shown below.
Step 2 - Use the “Bring In” / “Selected Items” list and select the items that will trigger the coupon value.
Step 3 - Use the “Get up to” / “Selected Items” list and select the items that will be eligible for the $0.50 discount.

Step 4 – Select OK and save configuration.
Related Configuration Options
SPOT has settings that will directly affect the use and implementation of coupons. The most common are listed and explained below. You may review the setting in the setup utility to review more details on the setting.

Store Settings
Site Defaults > Coupons Disallowed. This allows you to disable certain coupons at the store level. You may create a coupon good at one store and do not want it used at another.

Markin Settings > Allow Coupon with Discount/Promotion.

Markin Settings > Apply Coupons / Discounts to Item Alterations

Auto Coupons > Ability to select coupons that are automatically added to any new invoice without the user having to select a coupon. The customer has a related setting on the detail tab to disable automatic coupons.

Markin Settings > Visit Association. If you enable visit association coupons will be automatically applied to all invoices in the visit. Value may or may not apply to the invoice but the coupon will be on the invoice.

Workstation Settings

Markin Settings > Hide Zero-Price Coupons – This setting enables or disables the display and printing of coupons that have no value. Example: If you have a drycleaning coupon applied to a visit, one invoice in the visit is laundry the coupon will display with a zero dollar amount. With this setting enabled the coupon will not print or display.

Customer Screen

Detail tab > Disable Automatic Coupons – This setting is available is available at the customer level and will disable the creation and printing of automatic coupons.

Using / Tracking Groupon and other Serialized Coupons
You may work with one of many serialized coupon providers such as Groupon, LivingSocial etc. The promotions may provide discounts or prepaid services. You have the option to import the serialized coupons and track usage within Spot.

To Import: Menu -> Tools -> Data - Import/Export: Added import type of "CUSTOMER AWARDS." This will allow the user to import awards/coupons (from Groupon, LivingSocial, etc.) that are serialized and tied to a coupon but not to a customer. When the serial number is scanned, the coupon is associated to the customer and marked as redeemed. Headers for the import are: AWARDNAME, AWARDID, AWARDEXPIRATION. AwardName ties to the corresponding coupon in SPOT. AWARDID is a unique serial number for the award (must be unique - the import will fail if any are duplicated) and AWARDEXPIRATION is an optional expiration date field. If not specified, there will be no expiration.

Use: Add a coupon to the order using the coupon button, scan the barcode found on the printed coupon or mobile device. This will add the coupon to the order using the serial number of the provided coupon.

Reporting: Reports Gallery > Adjustments > “Imported Coupons Redeemed by Date”
Promotion Configuration

Overview
Promotions allow you to intelligently apply coupons and are applied to the customer. A customer may be associated to multiple promotions and each promotion may have multiple coupons. If you think coupons have a negative name association, you have never used promotions. In the past you may never have allowed a coupon in your store and you do not want to start now, just remember coupons are not used in promotions the same way a typical coupon is used. Promotions allow you to apply a single or multiple coupons to a customer automatically as described later in this chapter.

You may use “Promotion Groups” to automatically price employee benefits of 6 pieces per week or $50 per month, a good customer receives a free suit every month, you’re really good customers receive the free suit after every 10 suits and the free suit every month as examples.

This section is provided to give you an overview of promotions. You will want to test all of your configuration changes in coupons and promotions to make sure values expected are being applied. SBS takes no responsibility for the improper use of these options.

Configuration
Configuration for promotions is accessed via the setup utility at Company Settings > Promotion Settings. As in the sample below you can see examples of promotions. You have groups/levels and the defined promotions that apply to each group.

The example above shows the Gold Customer promotion applies the “5 Pant Special” and the “Free Shirt” promotions. The example below shows that Silver Customers only receive the “5 Pant Special”.

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Groups
Groups are the top layer of promotions. You must define a group in order to use promotions. The examples seen above have groups defined for “Customer” and for “Employee”.

Levels
Levels are defined to allow your group to have multiple levels. These levels may cause different rewards or the same rewards with different values. The example above shows a “Gold” and “Silver” customer level and a “Counter” and “Manager” level for the group Employees. You will define a promotion and assign it to a level. Each level may have one or more promotions assigned.

Example – 5 Pant Special
The example below shows a promotion for a “5 Pant Special”. The promotion will apply the coupon “5 Pants” every time a customer comes in with a new visit and it never expires.
The coupon definition below is used to apply the 5 pants special. The special includes 5 pair of pants for $8.00.

Example – Employee 6 Pieces free per week
The example below shows a promotion used to automatically give Employees 6 pieces free per week renewing every Sunday.

The coupon below is used to apply the “Employee – Clerk” promotion and gives 6 pieces free.
Customer Information

Each customer has the option of being associated with a promotion. This occurs on the Customer View > Details tab. This tab is show below with the customer assigned to the “Customer” promotion at the “Gold” level. Notice you can also see the assigned coupons with this promotion just by selecting the promotion in “Promotion Setup” window.

Each customer also has a “Promotions” tab. This tab is designed to show you usage of promotions and any values that are available. You will notice that this customer has done several orders with the pants but only two that had 5 pants to qualify for the special. Each time the customer awarded a savings of $17.00 at the time of usage.
Create a New Promotion

In order to create a new promotion you will assign a coupon. Make sure you have at least one coupon created and saved prior to following this process. To create a promotion you will navigate to Company Settings > Promotions Settings > Edit as shown below.

Once you have the Promotions screen open you will select the “Promotions” tab and you will view the screen below.
The options and descriptions available on the promotions screen are listed below. Each of these options has an effect on the usage and application of the promotion. Creating a coupon and promotion will require planning and testing prior to assigning to your customer.

**Promotion to View** – This is the name of the promotion you want to view

**Save** – Used to save any changes made to a promotion

**Rename** – Used to rename any promotions. Changing the name of promotions needs to be used with caution. Once you change the name all reporting will be shown by the new name and is not maintained by the previous name.

**Delete** – Used to permanently delete a promotion. This must be used with caution and is not recoverable without a restore of your configuration database.

**Promotion Usage**

**Start date** – Starting date of the promotion. By default you can leave this blank unless you do not want the promotion to start until some date in the future.

**End date** – Ending date of the promotion.

**Active on** – Used in conjunction with the starting date and is the default. You may use this or the “Activate at” option to activate / start the promotion for the customer.

- **Start Date** – Use the promotions start date to activate promotion
- **Membership Date** – Use the membership date or signup date to activate the promotion

**Activate at** – Used in conjunction with the starting date. You may use this or the “Activate at” option to activate / start the promotion for the customer. You have the option of using any number in combination with

- **Visits** – Use the visits to activate a promotion after X number of visits. If you choose to use 3 visits the promotion will automatically activate after the 3rd visit by the customer
**Pieces** – Use the Pieces to activate a promotion after x number of pieces detailed for a customer. If you choose to use 3 pieces the promotion will automatically activate after the 3rd piece is detailed for the customer.

**Dollars Spent** - Use the Pieces to activate a promotion after x number of dollars detailed for a customer. If you choose to use 30 dollars the promotion will automatically activate after $30 has been detailed for the customer.

**From** – This option is only active if you have used the “Activate at” option. This defines what date to use to activate the promotion.

**Start Date** – Start date defined in the promotions “Start Date”

**Renewal Date** – Date defined in the promotions “Renew on specified days”

**Membership Date** – Date defined by the date the customer was signed up.

**Closed on end date** – The date the promotion will expire / disabled and is the date specified in the “End Date” field of the promotion. This is the default for any new promotion

**Close After** – An option to customize the ending date / period of the promotion and overrides the “End Date” defined on the promotion. You have the option of using any number in combination with

**Days** – Number of days the promotion will be active

**Weeks** – Number of weeks the promotion will be active

**Calendar Months** – Number of Calendar months the promotion will be active. 3 calendar months from May would include June, July and August.

**Elapsed Months** – Number of elapsed months is from the 15th of one month to the 15th of the next month. 3 elapsed months from May 15th would be August 15th.

**Calendar Years** – Number of Calendar years the promotion will be active. 2 calendar years would be June 2003 to December of 2005.

**Elapsed Years** – Number of elapsed years the promotion will be active. 2 elapsed years from June 15th 2003 will be June 15th 2005.

**Visits** – Promotion will be active for X number of visits. If you select 10 visits the promotion will be active for 10 visits and uses the visit association as defined at the store level.

**Uses** – Uses is the amount of times the promotion has been used. If you use the example of 5 pants for 12 dollars and the customer brings in 10 pants this is 2 uses.

**Dollars Applied** – Total dollar value of the promotion usage. The value is defined by the price of the items – the promotion cost. This is used for giving a customer $30 of value and then the promotion will expire after $30 of savings.

**Item Applied** - Number of items the customer may use for the promotion. If the promotion calls for 10% off up to 100 items the promotion will disable after the 100th item.

**Coupon Details**

**Coupon** – This is the coupon that will be applied by the rules of the promotion

**Coupon Renewal**

**Does not renew** – The promotion will not renew for the customer. Once the values have been used or the promotion expires by date the promotion will not renew. This is the default for any new promotion
**Renew Every** – This setting allows you to automatically renew a promotion in a specified period of time. If a promotion has been closed for any reason and you enable this renew option, the promotion will be activated / enabled automatically as defined in these settings. You have the option of using any number in combination with

- **Days** – Number of days the promotion will be renewed
- **Weeks** – Number of weeks the promotion will be renewed
- **Calendar Month** – Number of Calendar months the promotion will renew. 3 calendar months from May would include June, July and August.
- **Years** – Number of elapsed years the promotion will renew. 2 years from June 15th 2003 will be June 15th 2005.

**Visits** - Promotion will be renewed in X number of visits. If you select 10 visits the promotion will be renewed for 10 visits and uses the visit association as defined at the store level.

**Renew on specified days** – Use the Days list to the right to define what days the promotion will renew. The example given for 6 pieces free for every employee renews every Sunday. Meaning if they bring in 7 pieces on Monday they get 6 free and 1 is paid by the employee. Once Sunday comes around the employee will be entitled to another 6 items free.

**Renew on specified months** – Use the months list to the right to define what months the promotion will renew.

**Expire on Date** – Only used in conjunction with the “Renew” options. The “Expire On” is used to override the close date and time. If the expire after option is

**Expire after** – Only used in conjunction with the “Renew” options. The “Expire On” is used to override the close date and time. If the expire after option is set you have the option of using any number in combination with

- **Visits** – Promotion will be active for X number of visits. If you select 10 visits the promotion will be active for 10 visits and uses the visit association as defined at the store level.
- **Uses** – Uses is the amount of times the promotion has been used. If you use the example of 5 pants for 12 dollars and the customer brings in 10 pants this is 2 uses.

**Dollars Applied** – Total dollar value of the promotion usage. The value is defined by the price of the items – the promotion cost. This is used for giving a customer $30 of value and then the promotion will expire after $30 of savings.
Customer Rewards / Frequent Buyer Program

Overview
Customer Rewards / Frequent Buyer options allow you to automatically reward customers for the business they bring you. This reward is automatically given to the customer after they spend “x” amount of money with you in a given department. The most common usage of this program is to reward your frequent customers that spend $150 with you. SPOT tracks each purchase (pickup) and assigns the value to the rewards amount for that customer. Once the customer reaches a balance of rewards you define they will be rewarded. This reward is configurable by you and can be a Cash Credit, A/R credit, automatic generation of a coupon or you may choose to use the “external” option. The external option allows you to update a table and at the end of the year you data can use them for money, refunds or for frequent flyer points.

Configuration
Navigate to the Home Page > Setup > Program Configuration > Company Settings > Customer Reward Settings > Customer Reward Settings. As shown below you may define as many programs as you require.

By selecting the “Settings” option for the rewards profile you will be given several choices for configuring the reward program.
Options for your rewards program are based on the following

**Awarding Points**

**Price Table** – A rewards program can be used for a specific price table or many price tables. Select the price table you are associating with the rewards program.

**Department** – After the price table is selected you will see all departments associated with the table.

**$/Point** – How many dollars will it take to issue a point towards the customers reward program. You may use .50, 1.00 or 5.00 for the amount to reward a point.

**Base on Pickup / Base on Pickup (No cash Credit)** – This option will allow you to choose when the points are rewarded. The default is “Base on Pickup”

**Expiration Profile**

**Months Inactive before removing points** – This option allows you to keep the customer “Frequent” and to incentivize the customer to keep using you or lose the points earned in his rewards account.

**Monthly % to reduce points** – This is the percentage that you will remove when the customer becomes inactive for the defined inactive months setting.

**Redemption Method**

**Credit (Cash, A/R)** – If selected this reward will generate an A/R adjustment for the amount specified for A/R customers or a Cash Credit for those customers that are not setup with an A/R account

**Manual (external process)** – Data base is updated with customer ID and amount of reward for later use and reporting by an external source outside of the operations of SPOT.

**Issue Coupon** – What coupon will be printed at the time the reward is issued to the customer at pickup.

Issue every “X” points – Use this number to determine how many points to issue for the amount defined in the $/Point column. You may use 1 point for every $1 or you may use 100 points to reward the customer every $100 spent. You may use $.50 to issue a point and require the customer to spend $200 to receive the reward.

Days Valid from Issue – Number of days this coupon will be valid from its reward. You may choose to set this to 30. This will require that the coupon be used within 30 days of receiving the reward coupon.

**Configuration Options - Customer**

After creating your reward programs you will assign a customer to a specific reward program. This is done on the Customer View > Detail screen you will assign the “Reward Program” to the customer. The customer will begin receiving points after this is assigned.

**Configuration Options – Store Settings**

Navigate to Home Page > Setup > Program Configuration > Store Settings > Customer Rewards Settings > and you will find several options to use for the when and how the reward will be issues or used. Use the help screen on the metaspace browser to assist in configuration

**Modify a Customers Reward Balance**

Navigate to the Home Page > F3 Menu > Frequent Buyer > Adjust Points button. This will bring up customer search allowing you to select the customer you would like to modify. Once the customer is selected you have
the option of selecting a predefined adjustment type of either add or remove points. These changes are permanent and can only be reversed with another off setting entry to the incorrect amount.
Customer Referral Program

Overview
Let your customers be your best sales person by using customer referral logic. The idea is to reward your customers for a referral. The reward is based on the future sales of the referred customer. This % of sales is configurable along with a defined expiration date. Your customers may provide a referral by word of mouth or a preprinted document to friends and family. Using the optional printed document is the most convenient for you, your existing customer and the referral customer. The printed document may include a coupon to incentivize the new customer to use your services. Customer referrals can only be applied at the time a new customer is created.

Associating a Customer as a Referral
Your staff will configure a referral by using the new customers "Customer View "-> "Details" tab. Select the "Customer Referral" button as shown below. **The referral can only be enabled at the time a new customer is created.**

Use the “Select Customer” and select the name of the referring customer. If you are using the printed referral coupon simply scan the barcode to associate the customer. This selection will associate the selected customer as the referral and populate the rules defined for this referral.
Printing “Referral Coupon”

To encourage your customer to use referrals use the convenience of printing a referral coupon. This option can be found on the customer general information screen as shown below. By selecting the “Referral Coupon” button you will print a business card size slip that includes the customer name, barcode and associated coupon.

Sample referral coupon is shown below.
Configuration

Customer referrals are setup at the store level to provide maximum flexibility. Please review the settings below for options in configuring your referral program.

Store Settings

Store Settings > Customer Settings > Customer Referral Settings

- **Enable Customer Referral** – Enables the option for this store

- **Referral Incentive Rate** – Percentage of the customers sales that will be given in cash credit to the referring customer

- **Referral Expiration Date** – The date the referral incentive will expire. Once this date expires the customer will no longer receive cash credits based on this customers sales.

- **Referring Customer Minimum Rating** – This option will require your referring customer to be a specific rating or higher. If the referring customer falls below the specified rating referral credits will not be applied. By default this setting is not enabled.
Print Referral Coupon – This will provide the “Print Coupon” button on the customer screen to print these coupons on demand.

Select Referral Source Coupon – This coupon will be associated with the signup of a referral incentivizing the customer to come in and sign up for service.

Charity Program

Overview
Many companies use third party credit card processing companies to promote charity programs, most are based on credit card spending or total transactions. With a third party provider a fixed percentage of each credit card transaction is submitted to a charity of choice by the third party provider. Your Customers don’t always know they are contributing, the charity itself may not know how much they are receiving and the transaction is very impersonal to the charity.

A charity program can be created in SPOT to track all sales for a given customer associated to a given charity. Reports can be run and totals donations for a charity can be viewed. Once the charity has been reported you may hand deliver the amount due the charitable organization in person. Many customer use checks or even over sized checks during the donation process. The charity appreciates knowing who is donating and you may even get some extra press time for the donation.

SPOT allows you to configure a program with a custom percentage of sales and report in real time for quick and easy tracking of a charity. The charity tracking process is easy, configure a charity name, contribution percentage and assign it to a customer. Each time a customer generates pickups the charity will then report the total sales for the period.

Configuration
You must first create a Charity Program and then assign the program to a customer or group of customers. To create the charity you will go to Setup > Program Configuration > Company Settings > Charity Settings > and create a New Charity.

Settings for the new charity program are shown below.

Name: The name of the charity that will be displayed in customer view and on reports. Keep this simple and short.

Contribution Percentage: Enter the percentage you would like to contribute for this program. The view above shows one half of a percent. (i.e. 1.5 = 1.5%) 

Start Date: Starting date of the program. Any sales done before this date will not be included in reporting.
**End Date:** Ending date of the program. Any sales done after this date will not be included in reporting.

**Assigning charity program to a customer**

Once you have the charity configured and saved in configuration you will need to assign it to a user. This is done on the Customer View > Detail tab. You will use the drop down on the screen to select the charity associated with the selected customer. You also have the option of selecting an expiration date for the charity. By default it used the end date defined in charity configuration.

**Reporting**

Reporting is quick and easy, a single report is used for reporting on your Charity Programs. This report can be found in Reports Gallery > Customer > Charity Donations. When running the report you will be prompted for a store or stores and date range for the period of pickups.
Word Merge

Overview
A Word Merge report takes advantage of the open architecture used in SPOT. The reason for the name Word Merge as a type of report is that it is an interface between SPOT and Microsoft Office and Microsoft Word. You can use any of our predefined “Word Merge” documents and create customer letters with ease using this seamless integration with Microsoft Word’s advanced mail merge functionality. If you choose to use this feature in SPOT it requires that your computer running the report has Microsoft Office 2000, Office XP or Office 2003 installed.

Configuration
All default Mail Merge documents installed with SPOT are letters personally addressed to the customer with first name, last name, address, city, state and zip. The default documents also include personalized store information including store name, address, and manager’s name and Email retrieved from the store where the reports are being run. To make the letters even more personal you have a signature area on the document for true personalization from the manager. Default documents are designed to print on an 8.5” x 11” piece of paper. We suggest you use a pre-printed company letterhead for a professional look. The page can then be tri-folded and slipped into a windowed #10 envelope. The combination of a pre-printed envelope and pre-printed letterhead makes for a professional marketing piece and your customers will be impressed.

If you have multiple stores default Mail Merge documents have been designed to be generic yet personalized across stores. This means you can use the same report for store #1 as for store #14. Each document has been enabled with the local store’s name, address, phone, manager, manager’s Email etc. All of the store specific tokens are located in the Setup > Location Information > Store tab. The Owner token is located in the Setup > Location Information > Company tab. SPOT generates all other tokens.

Current Word Merge Documents
The following documents are supplied with the most current release of SPOT.

A/R
- A/R Summary 30+ - Dunning Letter
- A/R Summary 60+ - Dunning Letter
- A/R Summary 90+ - Dunning Letter
- A/R Summary 120+ - Dunning Letter

Credit Card
- CC Expiration

Customer
- Apology Letter – All or CRM
- Happy Birthday Letter – All or CRM
- Lost Tuna – We Miss You Letter
- New Customers - Welcome Letter
- New Customers on Route - Welcome Letter
- Valued Customer - Thank You – All or CRM
- Top 5% of Customers
- Top 20% of Customers
- Top 50 Customers
- VIP Customers
- We Miss you – All or CRM

Test Document
- Mail Merge Test Document

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Customizing Default Word Documents

You can modify our existing default text contained in a document open any of the documents with Microsoft Word and make changes as needed. Remember that all “Word Merge” documents are located in the c:\Program Files\SBS\SPOT2000\Reports Directory. You can open the “Mail Merge Test Document.doc” included in the installation to review any and all merge fields currently available in your version of SPOT.

If you make any changes to documents be sure not to change the contents of any of the merge fields. You can change the location, font, alignment, etc but do not change the contents of the field or the merge will not work properly.

The following text is a copy and sample of the “Valued Customer.doc” letter generated from the CRM tab or the Valued Customer report option.

August 7, 2018

«FirstName» «LastName»
«Address1»
«City», «State» «PostalCode»

Dear «FirstName»,

Please accept this letter as a sincere thank you for your continued patronage of our store. You have been a long-standing and loyal customer and we appreciate your business. We value our relationship with all of our customers but your history with us has not gone unnoticed. If you have any special requests please do not hesitate to contact me personally.

Once again, thank you for your business and rest assured we will strive to continue to provide you with the quality and service you have come to expect from us.

Sincerely,

«ManagerName»,
Manager

«StoreName»
«StoreAddress1»
«StoreCity», «StoreState» «StorePostalCode»
«StorePhone»

Notice the fields contained in the document body flanked by the « » brackets are the actual merge fields. SPOT passes customer information to Word and Word then populates these fields in your document.

The documents mentioned are located in the C:\Program Files\SBS\SPOT2000\Reports Directory as .doc files. These are native Microsoft Word documents and can be modified with Microsoft Word as needed. You can make custom changes to these documents as long as you follow some very simple rules. The first and most important is to not modify any of the merge field’s contents on documents. You may move the fields, change fonts etc but do not change the content of the fields including the « » and between the « » . If these fields are modified your merge documents will stop working. The second rule is that if you modify a default document without renaming it or making a backup copy the next SPOT update will install and overwrite SBS provided default documents. This means the changes you make to our defaults are going to be overwritten with our defaults removing any of your changes. In order to keep this from happening we suggest you make backup copies of any documents you have modified at the time of the modification. After an update you will
then copy these files back to the reports directory and maintain your custom documents. You can also review the next chapter “Customizing Presentations and Using your Word Documents” as an alternative to making copies of the files.

**Customizing Presentations Using Word Documents**

If you would like to create your own documents for use with SPOT this is a fairly simple process and is done all the time by our customers. You will need to be familiar with our SPOT Query Report tool and have the system right to run SPOT Query. This configuration tool can be located and accessed a couple of different ways. The first is from Setup > SPOT Query and will give you access to all reports in the report gallery. The second and fastest way is from Reports > Reports Gallery > Report detail list on the left side of the screen. This mode lets you look at the report selected and not all reports. If you right mouse click on any report and you have the dialog to “Edit” the report. By selecting the “Edit” button these are the steps to change a report to use your custom Microsoft Word document.

We will be using the Customer / Apology Letter as our example document.

The first screen you will see after you select the Edit button will be the “Edit SPOT Query Item” dialog box. You will see this screen is broken up into 3 distinct sections. We will be using section 3 in this example. A word to the wise that any changes made that you are not sure of may cause this report to not be operable. Please take care when using the SPOT Query tool. Section 3 pertains to the presentation or the actual Word Merge settings of the report. If you select the Apology Letter line in section 3 and select the “Edit” button below in the section you will be prompted for additional settings.
These settings will allow you to select what the Name of presentation and the Type of presentation. Do not modify either of these items at this time. You will now select the “Settings” button on this screen.

This will display a list of options for this type of presentation. We have defined this presentation to be a Word Merge type. You now see a node called “Word Merge Settings”.

Select the “Word Merge Settings” node and review the items available on the Properties side of the dialog.
Document File Path is the name of the Word document you would like to use for this presentation. This name will need to be spelled exactly as the document is named in order to work. If you type just the file name and do not place a path for the file SPOT will look in the default c:\Program Files\SBS\SPOT2000\Reports directory for the file. You can see the “Apology Letter.doc” is entered by default. For an example if you have modified our default “Apology Letter.doc” and saved it as “My Apology Letter.doc” you would simply type My Apology Letter.doc in this field to use this document.

Once the document name has been entered press the OK button. This will take you back to the “Edit Presentations” dialog and press the OK button one more time to return to the “Edit SPOT Query Item” dialog. If you want this to be maintained as your modified document to be the default you will want to select the “Lock Item” check box in section 1. This will keep this report and presentations from being updated in the future with updates to SPOT. If this is not checked the next update on your system will update your presentation back to use the default “Apology Letter.doc”.

**Current Fields Available**

**Customer**

- **TITLE**
  - «Title»

- **FIRSTNAME**
  - «FirstName»
Customer Inventory Information
LATE30CNT «Late30Count»
LATE60CNT «Late60Count»
LATE90CNT «Late90Count»
LATE30AMT «Late30Amount»
LATE60AMT «Late60Amount»
LATE90AMT «Late90Amount»

Customer A/R Information
AR30BAL «AR30Balance»
AR60BAL «AR60Balance»
AR90BAL «AR90Balance»
ARCURBAL «ARCcurrentBalance»
ARTOTALBAL «ARTotalBalance»

Store Information
MGRNAME «ManagerName»
OWNERNAME «OwnerName»
STORENUMBER «StoreNumber»
STOREADDRESS1 «StoreAddress1»
STOREADDRESS2 «StoreAddress2»
STORECITY «StoreCity»
STORESTATE «StoreState»
STOREZIP «StorePostalCode»
STOREEMAIL «StoreEmailAddress»
STORENAME «StoreName»
STOREPHONE «StorePhone»
Mail Merge

Overview
Mail merge is a type of report that will allow you to export the results of reports defined as “Mail Merge” in a Tab delimited file for use in external programs such as Microsoft Excel, Word or any other third-party program.

Configuration
The following is an example of using the “New Customer Mail Merge” report to create a file that contains all customers mailing information. This file will include all new customers in a given date range. SPOT currently exports the following fields in any of the defined “Mail Merge” type reports.

- `<Customer:Name>` Last Name, First Name
- `<Customer:Address1>` 12345 South 300 East
- `<Customer:Address2>` Suite 200
- `<Customer:City>` Draper
- `<Customer:State/Province>` Utah
- `<Customer:Postal Code>` 84020

The customer’s name field is exported in the “Last Name, First Name” format. This has caused issues in the past for mailing letters etc. in that it should be FirstName LastName when addressing a customer. I will show you below how to use the current mail merge file to get the single column `<CustomerName>` to be formatted in a FirstName and LastName column in Microsoft Excel.

Step 1 - Run the “New Customer Mail Merge” report and use the selected date ranges. If your system is set to use the default C:\merge.txt file it will tell you that. If you have modified the report to prompt for a location then you will see a Windows dialog asking what and where you want to save this document. I will use c:\merge.txt for this document.

Step 2 - Once the document has been saved Open Microsoft Excel and Open the C:\merge.txt file using the *.txt filter.

Step 3 - Once the file is open you will be prompted by the “Import Text Wizard” to establish separator values.
As noted at the beginning of the document you see the customer name as “LastName, FirstName” separated by a “,”. Choose the defaults of this screen and select the “Next” button.

**Step 4** - By default the “Delimiter” Tab is selected. Select the “Comma” separator as noted in the next screenshot and notice the change in the spreadsheet layout below.

**Step 5** – You now see that the LastName and FirstName are now separated into separate columns. Press the “Next” button for the next screen of the Import Wizard.
Step 6 -

You will notice it is asking if you need to format these fields in any special way. Just select the "Finish" button at this point.

Step 7 - You will notice it is asking if you need to format these fields in any special way. Just select the "Finish" button at this point.
Notice that the first row of the file is the header row of the column. You notice that the “Customer:Name” column is correct but the second column defined as “Customer:Address1” is incorrect. Because we split the column, all headers are now shifted one row to the left of what they should be.

**Step 8** - Using the Windows copy and paste copy cells B1:Q1 and move the headers one column to the right as shown below.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Customer Name</strong></td>
<td><strong>Customer:Address1</strong></td>
<td><strong>Customer:Address2</strong></td>
<td><strong>Customer City</strong></td>
<td><strong>Customer Postal</strong></td>
<td><strong>Customer:</strong></td>
<td><strong>Customer:</strong></td>
<td><strong>Customer:</strong></td>
<td><strong>Customer:</strong></td>
<td><strong>Customer:</strong></td>
<td><strong>Customer:</strong></td>
<td><strong>Customer:</strong></td>
</tr>
<tr>
<td>233 E 69 CORP</td>
<td>233 E 69 ST</td>
<td>NEW YORK</td>
<td>10021 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABRAMS</td>
<td>CONSTANCE</td>
<td>235 FARRAH ROAD</td>
<td>NEW YORK</td>
<td>10021 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ACCARDO</td>
<td>JILL</td>
<td>300 Rector Place</td>
<td>24E</td>
<td>NEW YORK</td>
<td>10250 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AKHAMI</td>
<td>PARISA</td>
<td>355 E 72 ST</td>
<td>15E</td>
<td>NEW YORK</td>
<td>10021 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AMARI</td>
<td>NASSER</td>
<td>170 E 75 ST</td>
<td>2F</td>
<td>NEW YORK</td>
<td>10021 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANN</td>
<td>DEANIA</td>
<td>105 DUANE STREET</td>
<td>25C</td>
<td>NEW YORK</td>
<td>10007 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ANN</td>
<td>KATHERINE</td>
<td>1045 8 AVE</td>
<td>15FL</td>
<td>NEW YORK</td>
<td>10120 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALEXANDER McQUEE</td>
<td></td>
<td>417 WEST 14 ST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALLARIS</td>
<td>MAGDA</td>
<td>315 W 21</td>
<td>3A</td>
<td>NEW YORK</td>
<td>10011 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALLEN</td>
<td>ALEXANDRA</td>
<td>230 E 72 ST</td>
<td>8G</td>
<td>NEW YORK</td>
<td>10021 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALLEN</td>
<td>ROBERT</td>
<td>333 EAST 34TH STREET</td>
<td>12H</td>
<td>NEW YORK</td>
<td>10067 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALLURE MAGAZINE</td>
<td></td>
<td>4 TIMES SQUARE</td>
<td>10FL</td>
<td>NEW YORK</td>
<td>10036 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALFERT</td>
<td>BROOKIE</td>
<td>230 E 72 ST</td>
<td>27D</td>
<td>NEW YORK</td>
<td>10021 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALTMAN</td>
<td>STEPHANIE</td>
<td>215 E 69 ST</td>
<td>15J</td>
<td>NEW YORK</td>
<td>10021 NY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ALTZUCK</td>
<td>ARTHUR</td>
<td>207 EAST 61ST ST</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Step 9 - Now rename column A to “Customer:LastName” and column B as “Customer:FirstName” as noted below.
Step 10 - You can now save the file and you have a mail merge with a separate column for First and Last name. In the future SPOT will export the FirstName and LastName as a separate field but for now this is a way to get the data formatted as needed.

You are now ready to use the document for your mailing needs with all columns formatted and named correctly.
Customer Email Notification

Overview

Email notifications can be sent to Email customers’ configured to receive the required email notifications. You have options to send Email with the automated “Process Step Interceptor” or manually with the store based “Email Status Notifications” tool.

The difference between Store and Process Interceptor based Email is the Store based process will allow you to batch emails manually any time during the day while process interceptor happens at the time of the notification event. Notification Events may be generated at detail, rack or pickup. An example of a store based notification is to manually process and send ready order notifications after production is completed for the day and all ready orders have been racked. An example of the process interceptor based notifications is notifications are sent at the time the order / completed visit is racked. (Example) If a customer has a visit with 2 invoices, one racked at 10:00 am and the second at 11:00 am the email will be generated at 11:00 AM. The information from both orders is combined into one email. With the store based process the customer would receive one email at the time your staff manually processed he batch when all orders had been racked.

Compatibility / ISP Support

The use of this feature requires a compatible Email account / service provider that supports SMTP relay. If you are using SBS hosted email you are compatible and ready to configure your system. If you are using your own email server or service provider please refer to the “Required SMTP Services” section below to verify your current provider is compatible.

Consideration must be taken when sending bulk Emails to customers. Many ISP’s / Email providers SMTP relay services will block Email being sent in bulk or will not accept Emails from improperly configured mail servers. This may cause problems with your domain being blacklisted and your account being disabled. Removing your domain from Blacklists is a very time consuming and expensive process. Please check with your ISP / Email provider for any bulk email and anti SPAM configuration requirements you may need before sending bulk emails from SPOT.

Required SMTP Services

In order to use any of the Email options available in SPOT your Email provider “MUST” support “SMTP Relaying”. If you are using SBS Email services you have the proper SMTP relay services available. If you are not using SBS Email services DO NOT attempt to configure SPOT Email options until you contact your current Email / SMTP provider and ask the following questions.

For standalone customers - “Do you support SMTP relaying from my local network?”

For SBS hosted customers - “Do you or will you support SMTP relay connections from the following networks?”

64.90.195.64/27
64.90.201.0/27
64.58.224.161/27

If your Email provider answers “no” to the question the SMTP provider is not compatible with SPOT Email functionality. You have the option of finding a mail/ SMTP provider that will support the required network(s) or you have the option to subscribe to the SBS SMTP service(see SBS SMTP Service section below). Please contact sales at 801-208-2212 or sales@spotpos.com for more information on this service.

SBS SMTP Service

Verified Email Provider – SBS mail hosting and relay service provide virus and spam scanning services along with the proper DNS configurations ensuring customer mail servers will accept your Email.

Secure Access – Safe and secure is accomplished as authentication never leaves our private network.
No Rate Controls – Guaranteed fast Email delivery. You can send emails in batch using industry standard best practice limits. This will ensure fast and reliable delivery of your SPOT generated Email.

Unlimited Emails – You are provided unlimited use from your SPOT configuration with no daily/weekly/monthly send limit or excess charge.

Support for DNS SPF Record (Sender Policy Framework) – Using our dedicated SMTP relay services may require a DNS SPF record. Check with your current Email or DNS service provider to verify you have the proper SPF DNS record created. The following record should be created or IP address ranges appended to your existing SPF DNS record.

"v=spf1 mx include:mydrycleaner.com ~all"

Store Based Email Configuration

Each store has a configuration option for sending Emails at pre-defined process steps. Each Email may be configured to have a unique message for each process. Process Steps that will auto generate an Email include:

- Counter Detail – Email is generated at the time the order is detailed for a counter order
- Counter Ready – Email is generated at the time a counter order is placed in a ready status.
- Counter Pickup – Email is generated at the time a counter order is picked up
- Route Detail - Email is generated at the time the order is detailed for a route order
- Route Ready – Email is generated at the time a route order is placed into a ready status
- Route Delivery - Email is generated at the time a route order is posted
- Email Invoice – Email a single invoice to a customer from the order view screen
- Statement Email – Email you’re A/R Statements

These steps are defined in SPOT at detailing, rack and pickup. Counter and route customer may be Emailed with separate rules. Notice the Store settings > Email Settings below.
Email Settings – Store level setting used to send Emails. If you have multiple stores you will be required to configure each store that is going to use Email functions. You may duplicate login information on these stores as long as your ISP allows multiple logins for the same user name. All of these setting must be updated.

Return Address – Email address that will be used in the "From" line of your Email. Most mail servers will require a valid Email address in order for this to operate correctly. You will also want a valid Email in case the customer uses the “Reply” button on the Email.

SMTP Server – Location / Name of the Email server you will be delivering mail with. An example of a valid server address would be mail.yourdomain.com

SMTP Port – The default port used by most mail servers is 25. Please verify with the provider of your Email account to verify this setting.

Authentication Method – Verify with the provider of you Email account to verify what form of authentication is required. Your options are Basic and NTLM.

User Name – User that will used to authenticate to your mail server.

Password – Password that will used to authenticate to your mail server.

Counter Detail – Email to be sent at the time a counter order is “Detailed”

Subject: Subject line of the Email being sent
Message File: HTML file being used to create the sent Email. See HTML file configuration for more details

Counter Ready - Email to be sent at the time a counter order is "Racked" with a ready status

Subject: Subject line of the Email being sent

Message File: HTML file being used to create the sent Email. See HTML file configuration for more details

Counter Pickup - Email to be sent at the time of a counter order is "Picked up" or a sold status is assigned

Subject: Subject line of the Email being sent

Message File: HTML file being used to create the sent Email. See HTML file configuration for more details

Route Detail – Email to be sent at the time a route order is “Detailed”

Subject: Subject line of the Email being sent

Message File: HTML file being used to create the sent Email. See HTML file configuration for more details

Route Ready – Route orders that are racked to a “Ready” status

Subject: Subject line of the Email being sent

Message File: HTML file being used to create the sent Email. See HTML file configuration for more details

Route Delivery – All orders posted as delivered or sold via the route post orders screen

Subject: Subject line of the Email being sent

Message File: HTML file being used to create the sent Email. See HTML file configuration for more details

**HTML file creation**

Each time an Email is sent it will use an HTML file defined by the event. These files by default are located in your `c:\program files\SBS\spot2000\reports` directory. These files may be created with Notepad, Microsoft Word, Microsoft FrontPage or any other program that can generate an .HTML file extension.

You may create .HTM files for each process defined above. Below is a sample of our basic HTML file and may be customized to include your message, company logo colors etc.

**NOTE:** If you use Microsoft Word to create or edit files you must save files with the “Web Page, Filtered (*.htm, *.html)” option or the Emails will not be formatted properly and will not substitute tokens for customer data properly.

----- Sample Text ------

Dear @FIRSTNAME,

This Email is to notify you that invoice(s) @ORDERS is/are now ready for pickup. The amount due is @PRICE.

Thank you for your business. We look forward to seeing you very soon.
Sincerely

@STORECONTACT
Manager

@STORENAME
@STOREADDRESS
@STORECITY, @STORESTATE @STOREZIP
@STOREEMAIL

---- End of Sample Text ------

**List of Email Tokens**
You may use the following tokens in the body of your Emails to customize your message.

<table>
<thead>
<tr>
<th>Token</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>@ID</td>
<td>Customer ID</td>
</tr>
<tr>
<td>@CUSTOMERID</td>
<td>Customer ID</td>
</tr>
<tr>
<td>@CUSTOMERGUID</td>
<td>Customer GUID (internal use)</td>
</tr>
<tr>
<td>@FIRSTNAME</td>
<td>First name of customer</td>
</tr>
<tr>
<td>@LASTNAME</td>
<td>Last name of customer</td>
</tr>
<tr>
<td>@EMAIL</td>
<td>Customer Email 1</td>
</tr>
<tr>
<td>@EMAIL2</td>
<td>Customer Email 2</td>
</tr>
<tr>
<td>@PHONE</td>
<td>Customer Home</td>
</tr>
<tr>
<td>@PHONEMOBILE</td>
<td>Customer Mobile</td>
</tr>
<tr>
<td>@PHONEWORK</td>
<td>Customer Work</td>
</tr>
<tr>
<td>@PHONESMS</td>
<td>Customer SMS</td>
</tr>
<tr>
<td>@PHONEOTHER</td>
<td>Customer Other</td>
</tr>
<tr>
<td>@PHONEPAGER</td>
<td>Customer Pager</td>
</tr>
<tr>
<td>@ADDRESS1</td>
<td>Customers Address</td>
</tr>
<tr>
<td>@ADDRESS2</td>
<td>Customers Address 2</td>
</tr>
<tr>
<td>@CITY</td>
<td>Customers City</td>
</tr>
<tr>
<td>@STATE</td>
<td>Customers State</td>
</tr>
<tr>
<td>@POSTALCODE</td>
<td>Customers zip / Postal code</td>
</tr>
<tr>
<td>@CONTACT</td>
<td>Contact name if this is a “Business” type customer</td>
</tr>
<tr>
<td>@PIECES</td>
<td>Number of pieces in order / batch</td>
</tr>
<tr>
<td>@ORDERS</td>
<td>Number of order in batch</td>
</tr>
<tr>
<td>@PRICE</td>
<td>Price of invoice / batch</td>
</tr>
<tr>
<td>@CHARITYPROGRAM</td>
<td>Charity program a customer is associated</td>
</tr>
<tr>
<td>@CUSTOMFIELD</td>
<td>Custom field used by customer</td>
</tr>
<tr>
<td>@CUSTOMERBIRTHDAY</td>
<td>Customer birthday - DD/MM</td>
</tr>
<tr>
<td>@CUSTOMERSIGNUP</td>
<td>Customer signup - DD/MM/YY</td>
</tr>
<tr>
<td>@CUSTOMERSMS</td>
<td>Customer &gt; More Phones &gt; Pager</td>
</tr>
<tr>
<td>@CUSTOMERBIRTHDAY</td>
<td>Customer birthday - DD/MM</td>
</tr>
<tr>
<td>@CUSTOMERSIGNUP</td>
<td>Customer signup - DD/MM/YY</td>
</tr>
<tr>
<td>@CCTYPE</td>
<td>Credit Card on File type (MasterCard, Visa, AX)</td>
</tr>
<tr>
<td>@CLASTFOUR</td>
<td>Last 4 digits of Credit Card on file</td>
</tr>
<tr>
<td>@CCEXPIRE</td>
<td>Expiration date of the Credit Card on file</td>
</tr>
<tr>
<td>@CCEXP</td>
<td>Same as CCEXPIRE</td>
</tr>
<tr>
<td>@CCINFO</td>
<td>Type of card + last 4 digits (Visa *1324)</td>
</tr>
<tr>
<td>@CREDIT</td>
<td>Current customer Cash Credit balance</td>
</tr>
<tr>
<td>@ARMASTERACCOUNT</td>
<td>Customers A/R master accounts name</td>
</tr>
<tr>
<td>@BILLEDACCTBALANCE</td>
<td>Customer A/R billed account balance</td>
</tr>
<tr>
<td>@ACCTBALANCE</td>
<td>Customers A/R current balance</td>
</tr>
<tr>
<td>@REWARDID</td>
<td>Customers associated reward program name</td>
</tr>
<tr>
<td>@REWARDSBALANCE</td>
<td>Customers associated reward program points total</td>
</tr>
<tr>
<td>@ROUTENAME</td>
<td>Customers associated route name</td>
</tr>
<tr>
<td>Variable</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>@ROUTEADDRESS1</td>
<td>Customers Route address</td>
</tr>
<tr>
<td>@ROUTEADDRESS2</td>
<td>Customers Route address line 2</td>
</tr>
<tr>
<td>@ROUTEADDRESS</td>
<td>Customers Route address</td>
</tr>
<tr>
<td>@ROUTECITY</td>
<td>Customers Route address city</td>
</tr>
<tr>
<td>@ROUTESTATE</td>
<td>Customers Route address state</td>
</tr>
<tr>
<td>@ROUTEPOSTALCODE</td>
<td>Customers Route address postal code / zip code</td>
</tr>
<tr>
<td>@ROUTEZIP</td>
<td>Customers Route address postal code / zip code</td>
</tr>
<tr>
<td>@LOCKERPIN</td>
<td>Locker PIN number defined by customer</td>
</tr>
<tr>
<td>@LOCKERINVNO</td>
<td>All orders in visit associated with locker customer</td>
</tr>
<tr>
<td>@AWARDCOUPONBARCODE</td>
<td>Coupon barcode</td>
</tr>
<tr>
<td>@AWARDCOUPONID</td>
<td>ID of award / Coupon (8 digit number)</td>
</tr>
<tr>
<td>@AWARDID</td>
<td>ID of award / Coupon (8 digit number)</td>
</tr>
<tr>
<td>@AWARDBARCODE</td>
<td>Award Barcode</td>
</tr>
<tr>
<td>@AWARDNAME</td>
<td>Name of Award</td>
</tr>
<tr>
<td>@COMPANYEMAIL</td>
<td>Company Email entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYPHONE</td>
<td>Company Phone &gt; Location Information &gt; Phone</td>
</tr>
<tr>
<td>@COMPANYADDRESS1</td>
<td>Company Address entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYADDRESS2</td>
<td>Company Address 2 entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYCITY</td>
<td>Company City entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYSTATE</td>
<td>Company State entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYZIP</td>
<td>Company Zip code entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYWEBSITE</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYFACEBOOK</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYLINKEDIN</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYTWITTER</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYCUSTOMERCONNECT</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYMobilApp</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYOTHER1URL</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYOTHER2URL</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STORENUMBER</td>
<td>Company Store Number entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STOREEMAIL</td>
<td>Store Email entered in Setup &gt; Location Information &gt; Store</td>
</tr>
<tr>
<td>@STOREADDRESS1</td>
<td>Store Address entered in Setup &gt; Location Information &gt; Store</td>
</tr>
<tr>
<td>@STOREADDRESS</td>
<td>Store website entered in Setup &gt; Location Information &gt; Store</td>
</tr>
<tr>
<td>@STOREADDRESS2</td>
<td>Store Address2 entered in Setup &gt; Location Information &gt; Store</td>
</tr>
<tr>
<td>@STORECITY</td>
<td>Store City entered in Setup &gt; Location Information &gt; Store</td>
</tr>
<tr>
<td>@STORESTATE</td>
<td>Store State entered in Setup &gt; Location Information &gt; Store</td>
</tr>
</tbody>
</table>
Example of @DETAILINVOICE Email Token

The following image is an example of a “Process Step Notification” Email for a customer’s detailed orders using the @DETAILINVOICES token. Notice the number of orders is shown in the text and the actual invoice detail is displayed.

Sending Emails

With this store based configuration Emails are placed in a batch or queue. This batch or queue needs to be sent at some point during the day. Generally this will be done after your promised time for the day. Sending the at this time will alert customers of ready orders for the day and the time as shown on quick or detailed invoices received at the time of drop off. The utility used to send Emails is found by navigating from the Home Page > F3-Menu > Process > Process Step Notifications. This utility will allow all Emails that have been generated since the last process to be sent at one time. The reason for sending these all at one time is
so that if a customer has more than one Email for a step they will be combined into one Email. This means a customer has 3 orders that had been racked during the day. They will receive a single Email with the totals of all 3 orders combined. This way the customer will have only receive a single Email at the time you process rather than three separate Emails sent at the time the orders had been racked.

Step 1 – Select the event you would like to send Emails for

Step 2 – Load customers for event chosen

Step 3 – Send Emails. Make sure you are working on a machine that has the ability to send MAPI compliant Emails.

Customer Does Not Want Email

If a customer has a valid Email address in their customer profile they will receive Emails as configured. If a customer decides not to receive Emails you may set that customers profile to “Disable Marketing” on the customers Detail tab.
Email via Process Interceptor

Overview
This configuration should only be used with SBS assistance. It is designed to be process step based and is a very complex configuration. Most users will use the basic Email configuration as noted in earlier chapters. This method of Emails also sends the Email notification at the time the process interceptor is triggered and Emails are not queued and summarized as they are using the previous chapter “Customer Email Notification”. The example would be that you configure detailing of orders to trigger an Email. You detail 3 orders for the customer. Each order will generate an individual Email to the customer at the time it is detailed and saved. You may only want to use the process interceptor option for specific process steps like redo’s, management review or other special circumstances.

Configuration
1. Make sure there is an interceptor defined.
   1.1. System Settings-Operations Settings-Process Interceptors
   1.1.1. Name – Email Notifier
   1.1.2. Interceptor ProgId – SPViews.EmailNotifier
2. Attach the EmailNotifier to a process step.
   2.1. Go to the process step definition in Company Settings-Workflow Settings-Processing Steps
   2.2. Click on Process Interceptors
   2.3. Check EmailNotifier and OK
   2.4. In the “Post-Interceptor Construction String” field, specify the following fields separated by the tilde (~) character: This string will consist of 7 parameters based on 0. The list of supported parameters are as follows.

   0 - Context (Detail, Rack or Pickup are only supported contexts)**
   1 - Subject of Email**
   2 - .htm file**
   3 - Name of attachment file
   4 - Name of mode (DUEVISIT, DUETODAY (if left empty, an Email will send for each and every invoice)
      • DUEVISIT will cause Emails to be sent when all orders in a visit are in a ready status.
      • DUETODAY will cause Emails to be sent when all orders due today are in a ready status
   5 - Outlook (tries to Email using Outlook if set - Leave empty by default)
   6 - Debug (LEAVE EMPTY - ONLY FOR USE BY DEVELOPER)
   7 - Counter/Route/Hotel filter (Counter, Route, Hotel are names - does not filter if left empty)

   This is a sample construction string:
   Rack~Your Order is Ready~OrderReady.htm~~DUETODAY~~~Counter
   This sample will process Emails as follows
   All Racked orders
   Subject of Email will be “Your order is Ready”
   Body of Email will be created using “OrderREady.htm” file
   No attachment will be sent
   The mod of “DUETODAY” will be used.

   **Parameter MUST BE PRESENT or the Email will NOT send!"
3. Refine the message text
3.1. Tokens available:
   3.1.1.@FIRSTNAME
   3.1.2.@LASTNAME
   3.1.3.@PROMISEDDATE
   3.1.4.@INVOICENUMBER – does not work with ~DUETODAY or ~DUEVISIT options
   3.1.5.@ITEMLIST – does not work with ~DUETODAY or ~DUEVISIT options
   3.1.6.@TOTALDUE

   NOTE – This version of the e-mail notifier will send an individual message for each invoice. It will also send a message EACH time an invoice is scanned into the given process step.
**Customer Does Not Want Email**

If a customer has a valid Email address in their customer profile they will receive Emails as configured. If a customer decides not to receive Emails you may set that customers profile to “Disable Marketing” on the customers Detail tab.
SMS via Process Interceptor

Overview
This configuration should only be used with SBS assistance. It is designed to be process step based and is a very complex configuration. Most users will use the basic Email configuration as noted in earlier chapters. This method of Emails also sends the Email notification at the time the process interceptor is triggered and Emails are not queued and summarized as they are using the previous chapter “Customer Email Notification”. The example would be that you configure detailing of orders to trigger an Email. You detail 3 orders for the customer. Each order will generate an individual Email to the customer at the time it is detailed and saved. You may only want to use the process interceptor option for specific process steps like redo’s, management review or other special circumstances.

Configuration
4. Make sure there is an interceptor defined.
   4.1. System Settings-Operations Settings-Process Interceptors
      4.1.1.Name – Email Notifier
      4.1.2.Interceptor ProgID – SPViews.EmailNotifier
5. Attach the EmailNotifier to a process step.
   5.1. Go to the process step definition in Company Settings-Workflow Settings-Processing Steps
   5.2. Click on Process Interceptors
   5.3. Check EmailNotifier and OK
   5.4. In the “Post-Interceptor Construction String” field, specify the following fields separated by the tilde (~) character: This string will consist of 7 parameters based on 0. The list of supported parameters are as follows.

   0 - Context (Detail, Rack or Pickup are only supported contexts)**
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   5 - Outlook (tries to Email using Outlook if set - Leave empty by default)
   6 - Debug (LEAVE EMPTY - ONLY FOR USE BY DEVELOPER)
   7 - Counter/Route/Hotel filter (Counter, Route, Hotel are names - does not filter if left empty)

This is a sample construction string:
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   This sample will process Emails as follows
   All Racked orders
   Subject of Email will be “Your order is Ready”
   Body of Email will be created using “OrderREady.htm” file
   No attachment will be sent
   The mod of “DUETODAY” will be used.
   **Parameter MUST BE PRESENT or the Email will NOT send!"

6. Refine the message text
   6.1. Tokens available:
      6.1.1.@firstname
      6.1.2.@lastname
      6.1.3.@promiseddate
      6.1.4.@invoicenumber – does not work with ~DUETODAY or ~DUEVISIT options
      6.1.5.@itemlist – does not work with ~DUETODAY or ~DUEVISIT options
      6.1.6.@totaldue

NOTE – This version of the e-mail notifier will send an individual message for each invoice. It will also send a message EACH time an invoice is scanned into the given process step.
Customer OPT-IN to receive SMS Messages

If a customer has a SMS Phone in their customer profile they will not automatically receive SMS messages. Each customer must OPT-IN to SMS messages with the SMS reminder configuration. There is no global setting available in the US to enable all customers for SMS, each customer must OPT-IN.

Available SMS Tokens

Below is a list of all SMS Tokens available in an process interceptor. * indicates the token is available for Spot Scheduler based SMS messages.

<table>
<thead>
<tr>
<th>Token</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>@ID*</td>
<td>Customer ID</td>
</tr>
<tr>
<td>@CUSTOMERID*</td>
<td>Customer ID</td>
</tr>
<tr>
<td>@CUSTOMERGUID</td>
<td>Customer GUID (internal use)</td>
</tr>
<tr>
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<td>Last name of customer</td>
</tr>
<tr>
<td>@EMAIL</td>
<td>Customer Email 1</td>
</tr>
<tr>
<td>@EMAIL2</td>
<td>Customer Email 2</td>
</tr>
<tr>
<td>@PHONE</td>
<td>Customer Home</td>
</tr>
<tr>
<td>@PHONEMOBILE</td>
<td>Customer Mobile</td>
</tr>
<tr>
<td>@PHONEDADWORK</td>
<td>Customer Work</td>
</tr>
<tr>
<td>@PHONESMS</td>
<td>Customer SMS</td>
</tr>
<tr>
<td>@PHONEOTHER</td>
<td>Customer Other</td>
</tr>
<tr>
<td>@PHONEPAGER</td>
<td>Customer Pager</td>
</tr>
<tr>
<td>@ADDRESS1*</td>
<td>Customers Address</td>
</tr>
<tr>
<td>@ADDRESS2*</td>
<td>Customers Address 2</td>
</tr>
<tr>
<td>@CITY*</td>
<td>Customers City</td>
</tr>
<tr>
<td>@STATE*</td>
<td>Customers State</td>
</tr>
<tr>
<td>@POSTALCODE*</td>
<td>Customers zip / Postal code</td>
</tr>
<tr>
<td>@CONTACT</td>
<td>Contact name if this is a “Business” type customer</td>
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<td>Customer birthday - DD/MM</td>
</tr>
<tr>
<td>@CUSTOMERSIGNUP</td>
<td>Customer signup - DD/MM/YY</td>
</tr>
<tr>
<td>@CUSTOMERSMS</td>
<td>Customer &gt; More Phones &gt; Pager</td>
</tr>
<tr>
<td>@CUSTOMERBIRTHDAY</td>
<td>Customer birthday - DD/MM</td>
</tr>
<tr>
<td>@CUSTOMERSIGNUP</td>
<td>Customer signup - DD/MM/YY</td>
</tr>
<tr>
<td>@CCTYPE</td>
<td>Credit Card on File type (MasterCard, Visa, AX)</td>
</tr>
<tr>
<td>@CCCATLASTFOUR</td>
<td>Last 4 digits of Credit Card on file</td>
</tr>
<tr>
<td>@CCEXPRIOR</td>
<td>Expiration date of the Credit Card on file</td>
</tr>
<tr>
<td>@CCINFO</td>
<td>Same as CCEXPRIOR</td>
</tr>
<tr>
<td>@CCINFO</td>
<td>Type of card + last 4 digits (Visa *1324)</td>
</tr>
<tr>
<td>@CREDIT</td>
<td>Current customer Cash Credit balance</td>
</tr>
<tr>
<td>@ARMMASTERACCOUNT</td>
<td>Customers A/R master accounts name</td>
</tr>
<tr>
<td>@BILLDEDACCTBALANCE</td>
<td>Customer A/R billed account balance</td>
</tr>
<tr>
<td>@ACCTBALANCE</td>
<td>Customers A/R current balance</td>
</tr>
<tr>
<td>@REWARDID</td>
<td>Customers associated reward program name</td>
</tr>
<tr>
<td>@REWARDDSBALANCE</td>
<td>Customers associated reward program points total</td>
</tr>
<tr>
<td>@ROUTENAME*</td>
<td>Customers associated route name</td>
</tr>
<tr>
<td>@ROUTEADDRESS1</td>
<td>Customers Route address</td>
</tr>
<tr>
<td>@ROUTEADDRESS2</td>
<td>Customers Route address line 2</td>
</tr>
<tr>
<td>Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>-------------------------------------------------------</td>
</tr>
<tr>
<td>@ROUTEADDRESS</td>
<td>Customers Route address</td>
</tr>
<tr>
<td>@ROUTECITY</td>
<td>Customers Route address city</td>
</tr>
<tr>
<td>@ROUTESTATE</td>
<td>Customers Route address state</td>
</tr>
<tr>
<td>@ROUTEPOSTALCODE</td>
<td>Customers Route address postal code / zip code</td>
</tr>
<tr>
<td>@ROUTEZIP</td>
<td>Customers Route address postal code / zip code</td>
</tr>
<tr>
<td>@LOCKERPIN*</td>
<td>Locker PIN number defined by customer</td>
</tr>
<tr>
<td>@LOCKERINVOICES*</td>
<td>All orders in visit associated with locker customer</td>
</tr>
<tr>
<td>@BAGS*</td>
<td>Number of bags picked up by RouteTrac</td>
</tr>
<tr>
<td>@COMPANYEMAIL*</td>
<td>Company Email entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYPHONE*</td>
<td>Company Phone &gt; Location Information &gt; Phone</td>
</tr>
<tr>
<td>@COMPANYADDRESS1*</td>
<td>Company Address entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYADDRESS2*</td>
<td>Company Address 2 entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYCITY*</td>
<td>Company City entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYSTATE*</td>
<td>Company State entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYZIP*</td>
<td>Company Zip code entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYWEBSITE</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company &gt; URL &gt; WebSite</td>
</tr>
<tr>
<td>@COMPANYFACEBOOK</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company &gt; URL &gt; Facebook</td>
</tr>
<tr>
<td>@COMPANYIINKEDIN</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company &gt; URL &gt; Linkedin</td>
</tr>
<tr>
<td>@COMPANYTWITTER</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company &gt; URL &gt; Twitter</td>
</tr>
<tr>
<td>@COMPANYCUSTOMERCONNECT</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company &gt; URL &gt; CustomerConnect</td>
</tr>
<tr>
<td>@COMPANYMOBILAPP</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company &gt; URL &gt; MobilApp</td>
</tr>
<tr>
<td>@COMPANYOTHER1URL</td>
<td>Website URL entered in setup &gt; Location Information &gt; Company &gt; URL &gt; Other1URL</td>
</tr>
<tr>
<td>@COMPANYOTHER2URL</td>
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<td>Store Name entered in Setup &gt; Location Information &gt; Store</td>
</tr>
<tr>
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<td>Store Name entered in Setup &gt; Location Information &gt; Store</td>
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<td>Store Contact entered in Setup &gt; Location Information &gt; Store</td>
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<td>Route Name of customers assigned route</td>
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<tr>
<td>@PROMISEDDATENOTIME</td>
<td>Invoice promised date with not promised time</td>
</tr>
<tr>
<td>@PROMISEDDATE</td>
<td>Invoice promised date</td>
</tr>
<tr>
<td>@RACKLOCATION*</td>
<td>Location of orders associated with customer</td>
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<tr>
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<td>Invoice number</td>
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<tr>
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<td>----------------</td>
</tr>
<tr>
<td>@DATE</td>
<td>Current date in DD/MM/YY format</td>
</tr>
<tr>
<td>@DATETIME</td>
<td>Current date time in 1/10/2010, 4:50 PM format</td>
</tr>
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Route Operations

Overview

SPOT has a never-ending development cycle in routes. This is probably the most complicated and option packed area of SPOT. We allow a classic static route configuration with a single route and multiple customers to a very complicated multiple route configuration with both static routes and on demand customers. This document will assist in understanding many of the settings that are now available in SPOT and the delivery options.

There are two types of routes, “Static” and “On Demand”. You will find examples of each type of route below.

Simple Static Route

This type of route will have defined pickup/delivery days. For instance you have a route called Route 1 that is defined by default with Monday and Thursday delivery/pickup days. As an example Route 1 is defined with stops 1-6. The customer Ron Jones is at stop 5. This means Ron Jones will be the 5th stop on this route and he will have a pickup and delivery both Monday and Thursday as noted with valid on “M--T” below.

This type of route configuration is generally used with a given driver handling more than one route. The route designation (number in this case) determines the customer delivery days. IE – Driver A: Route 1 would be “Mon/Thu”, Route 2 for “Tue/Fri”, Driver B: Route 3 for “Mon/Thu”, Route 4 for “Tue/Fri”, etc.

This route scheme allows for a very simplistic approach to sequencing the customers, and doesn’t allow a great deal of flexibility in different delivery schedule types, such as sets of customers for “Mon/Thu”, “Mon/Wed”, “Tue/Thu”, “Tue/Fri”, etc with the same driver.

Static Route with Different Delivery Days

This configuration will have customers on a single route but multiple delivery days. You may have customers with a route default pickup and delivery/drop-off date. As noted below you have Tim Johnson on stop one with Monday and Wednesday stops, Kim Thomas at stop 2 with a Tuesday only stop while Karen Larsen at stop 4 has a Friday stop. This will allow a route to contain any pickups and delivery for any day of the week by customer for the route.
This type of route configuration is used by a single driver or for multiple drivers. An example would be a single driver for Mon-Wed and another driver for Tue-Fri etc.
On Demand Route

This configuration has customers that are dynamic or on demand. This means your driver will not visit the customer until the customer calls and requests a pickup or delivery. You will notice they have no defined days as shown below.

On Demand route configuration is used for customers who may not give you enough business to stop on a weekly basis or that do not have a regular/predictable use of your services. Place them on a route that is On Demand based and let your driver pickup and deliver as requested by the customer.

Route operations

Select the route you would like to work with. Notice the route tab below is for Route 3 and has 3 stops defined.

There are several fields and buttons located on this screen. They are defined below.

**Search by Name** – This button allows you to type a customer’s name in the blank area immediately to the left of the button and search this route for the name in the field.
Search by ID – This button allows you to type or scan a customer ID in the blank area immediately to the left of the button and search this route for the customer ID entered.

Route detail screen – The main body of the route screen contains details for the route. It displays the stop, account name, valid on date and address/instructions of the route. The address / instructions display is determined by a meta setting discussed later in this document.

Insert Stop - Inserts a new stop on the route. If a route stop is selected when this button is selected it will place the route stop in front of the select stop. If you select this button without a route stop selected it will place the stop at the end of the route. You will be prompted for route stop information on this screen. Route stop information is important because this is what will create the rule for how the customer / stop displays on the manifest.

You have the following options that will assist you in configuring a stop

Linked Stop – This is a field you will use if you want a route stop to follow a stop with no exception. This can be used for an apartment that is located next to an address, an office in a building or a non-map able address with SPOTmap and MapPoint. An example is if you use stop 10 as the linked stop and stop 10 gets moved to 22 your stop defined will move with the linked stop.

Stop # - This is the stop number you would like to insert. If you selected a stop before selecting insert stop that stop number will be displayed. You can type any number for a stop number in this field and it will insert it at that defined stop. If you currently have 5 stops and you type stop 7 it will insert the stop at the end of the stop list at stop 6.

Address, City, State Zip, Phone – By default the selected customer's information will be used to fill in these fields. If the customer has a route address defined via the "more address" button on the customer profile this address will be used.

Days to visit stop – These are the default days the stop will be visited. An example is if you specify a customer to be a Tuesday Thursday stop they will be included on the manifest when run and you include either Tuesday or Thursday. These setting can be set for a default for each route as noted in later chapters. If no days are selected you will use the on demand scheduler to schedule pickup and delivery days for this stop.

Account – This is a list of customers that will be located on this stop. Most route configurations will only include one customer per account on this stop setup. An
example of multiple customers on a single stop would be an office building or a retail business that has a single address but has multiple customers. A good example and use of stops for an office building would be to create the stop using the office building name and office building address for the stop. Then you can assign your additional customers to the route and they will all show on the manifest as sub stops on stop 1.

**Delivery Instructions** – These are instructions that are included on the manifest for any special instruction required by the office or by the delivery driver. Examples are “Deliver to the back door”, “Make sure you close the garage door” and “Do not leave clothes in bad weather.”

**View Customer** – If you have a customer selected in the account list and select this button it will take you directly to the customer’s profile.

**Use Address** – If you have a customer selected in the account list and select this button it will use that customer’s address or that customer’s route address if available on the customer’s profile. This is used if you have multiple customers on the stop and want a particular customer’s address to be used for the stop address.

**Insert** – Use this to add additional customers to the stop.

**Remove** – Use this to remove the selected customer from the stop. You must have at least one customer selected to create a route stop.

**Edit Stop** – This will display the current stop configuration screen as explained in the “Insert Stop” button above.

**Remove Stop** - This will remove the selected stop and remove any customers assigned to the stop from the route.

**Print Bag Tags** – This is a feature that will allow you to print bag tags for all customers on the route or just the selected customer. You will need to have the workstations bag tag printer and template set up to take advantage of this option.

**Customer View** – This will display the selected customer’s profile.

**Move Stops** – This feature can be used for moving existing customers in the same route or moving them from route to route. If you have a route selected before selecting this feature it will automatically fill in the selected stop number in the “From” side of the dialog. You can now select a new route location to place the stop or choose the “Insert at Start of Route” or “Add to End of Route” and press the OK button.

You can use this feature to move customers from route to route. An example is that you have a route that has 300 stops and you want to split the route. You can create a new route and then use this feature to move stops 150-300 from route 3 and insert them into route 4 at the beginning of the route.
Print Route Report - You can get an alphabetical listing or a list sorted on the stop number for the route selected. This will include every customer on the route.

SPOTmap – See the chapter “SPOTmap” later in this document.

Delivery Manifest – See the Chapter “Running the Manifest” later in this document.

Post Orders - See the Chapter “Posting Orders” later in this document.

View Orders – Use this feature to display all orders that are not delivered for the entire route.

Close – Exit the “Delivery” tab and return to the “Home Page”.

Route Setup and Configuration

There are several places to set up your route operations. There are configuration options at the Company, Store, Workstation and Customer level. The following chapter will explain many of the different options that are available to your route operations. Many of the changes made will make sweeping changes in the way routes operate so please be aware of what you are changing when you change it. It is suggested that you do not make sweeping changes to a route until you completely understand what is required.

Company Settings / Route Settings

Auto Enable Account for Route Customers – When enabled a customer added to a route will be made an A/R customer automatically and added to your default billing group.

Route A/R Tender Type – This will give you the default for each customer’s tender type. The default here is A/R.

Show Only Ready Orders on Manifest – If this is enabled you will only see orders in a ready status on your manifest. If this is not enabled you will see all orders ready or promised on or before the day the manifest is run.

Use Extended Route Numbering – This is enabled so that if you insert a new customer in your route after you have detailed orders the new stop will be a sub stop of the original. An example of this is if you insert a customer on a route between stop 3 and 4 the customer at stop 4 becomes stop 5 and all others below it move down one. With this setting enabled and you insert a customer between 3 and 4
you will get a stop of 3.5. This will allow you to assemble all orders in the same order they were detailed. You have the option at a later time to re-synchronize these to a non-decimal based route stop.

A second way of using this is by using sub stop numbers. You may have an office building with 10 stops in it. If you add all 10 customs to stop 1 you do not know what order to deliver these in. You can set customers to 1.1, 1.2, 1.3 etc and assist you in the delivery to these type of locations.

**Use Manifest with Signature Line** – With this enabled you will get a signature line for each route stop on your manifest. This allows you to collect delivery confirmation from customers.

**Store Settings / Route Settings**

![Program Configuration](image)

**Display A/R Balance on Manifest** – This setting when enabled will display the current A/R balance for a customer on the manifest. Be warned this setting will impact the time it takes to create a delivery manifest. Each time you generate a manifest SPOT will recalculate the customer's current A/R balance. This has the ability to cause a manifest that would normally run in 10 seconds to take 10 minutes or more to run.

**Hide Prices On Manifest** - With this enabled you will not see invoice amounts or delivery amounts printed on the manifest.

**Prompt for Non-Delivery Reasons** – You have the option to give a reason for orders that are not being delivered. As your driver returns with non-delivered orders and they are removed from the post orders process you will be prompted for the reason these orders are being returned to the plant. Examples for Non-Delivery are not home, on vacation, any money or quality just to name a few. These are configurable by you at Store Settings > Route > Non-Delivery reasons.
Remove Route on Customer Reassign – If you have an order that is defined as a route order and the order is then reassigned to a non route customer the route information on the invoice will be removing.

Route Detail Display Mode – This will determine how your route screen will display information. You have the option of “Show Address” or “Show Delivery Instructions” on this screen. Some customers like the original view of delivery instructions while others have requested an address lookup.

Use Customer Specific Route Setup – There are four options for this setting. When using a simple route configuration this should be set to Optional (No) or Never. If you are using any dynamic or custom pickup and delivery options for your customers you will want to use Optional (Default to Yes), Optional (Default to No), or Always. Using the Optional configurations you will have the ability to change a customer from static route configuration to a customer specific configuration.

Optimize Manifest – There are three options for this setting and only effect stations that have Microsoft Mappoint installed. Options are No, Yes, and Prompted. After selecting the delivery date for your manifest and the type of manifest you will see an option to Optimize manifest with the “Prompted” setting, forced to Optimize with the Yes and No will never display this option for the manifest. This will optimize only those customers and stops on the manifest. See Optimizing your manifest later in this chapter.

Print Driving Directions – This option allows you to configure if driving directions are included on the manifest. The options are:

No – The manifest will never included on the manifest

Yes – The manifest will always include driving direction on the manifest.

With Optimization – If you choose to optimize at the time of printing SPOT will include printed driving directions.

Route Specific Settings
Name - This is the name of the route and will be displayed in reports and on screen by this name. Do not rename a route after customers have been assigned to a route. This will cause serious issues with your route operations and reporting.

Description – A brief and general description of the route.

Active – This allows the route to be used in your operation. If the check mark is not selected you will not see the route in reporting or any other route operations.

Route Type – Static specifies if the route will be a scheduled delivery date route or an on-demand route using the On-Demand Scheduler and used with the process interceptor called “On Demand Scheduler”. This will allow a route defined as On Demand to automatically prompt for a delivery date with the On Demand Scheduler when an invoice is saved.

Default Days – Default days a customer will be assigned at the time they are assigned to a route. This can be modified at the stop level when needed.

Price Table – Default price table for the route. You may have a retail price table and a route price table. This is the default price table to be used for customers on this route.

Promised Day Schedule – Default promised dates used for this route. You may have a retail counter promised day schedule, a route 1 and a route 2 promised day schedule. This will define what Schedule will be used at detail.

Tax Entity – If the sales of this route are applicable to sales tax this will define what tax entity is used to calculate the tax.

Alteration Tax Entity – If alterations are subject to sales tax this will define what tax entity is used to calculate tax for alteration items.

Default Pickup Schedule – The default to be used when you have “Customer Specific” route rules enabled for a particular customer.

Default Delivery Type – The default to be used when you have “Customer Specific” route rules enabled for a particular customer.

Synchronize Pickup/Delivery Types – This is used if you are using “Customer Specific” route rules only. This will force the Pickup and Delivery tabs to be synchronized and not allow unique customer specific pickup and delivery instructions.

Default Day Schedule – If you are using “Customer Specific” route rules these are the defaults for the rules table. This is used to populate a customer’s route tab default settings when assigned to a new route.

Minimum Time Window – Only used when exporting route information to external route optimization software and is not applicable with general use of SPOT.

Maximum Time Window – Only used when exporting route information to external route optimization software and is not applicable with general use of SPOT.

Default Time Range – Only used when exporting route information to external route optimization software and is not applicable with general use of SPOT.

Companion On-Demand Route – This is used in conjunction with the on demand scheduler. This is the default route used for any one on the route who has an on demand scheduled visits or pickup. At the time of the on-demand schedule the default route for the pickup / delivery will be this companion route and not the current route they are assigned to.

Include Orders in this Location only – This is used in conjunction with the setting “Display Only Ready Orders on Manifest”. By default the manifest will look at all orders ready or promised for the day of the manifest and scheduled for the customer. This setting along with the Display Ready
Orders will allow you to show only orders on a manifest that are in a particular location. An example of this would be if you have a process step or a rack location called “Route” or “Ready” that you scan ready orders into. If you placed the word Route in this field the only orders on the manifest would be orders located in the “Route” location.

**Display Reconciliation Window** – Used to enable route reconciliation feature. This setting also require the use of “Include orders in this location” and “Display Only Ready orders on the Manifest”.

**Prompt for Delivery** – When a scheduled (on-demand) pickup is scheduled will a delivery automatically be scheduled.

**Turnaround Offset** - Only used when exporting route information to external route optimization software and is not applicable with general use of SPOT.

**Schedule Delivery after Order Save** - Only used when exporting route information to external route optimization software and is not applicable with general use of SPOT.

**Offset from Promised Date** - Only used when exporting route information to external route optimization software and is not applicable with general use of SPOT.

**Separate Manifest Page Per Stop** – Enabling this will cause the manifest to generate a separate page for each stop on the route. An example would be a 20-stop manifest will generate 20 single sheets at the time the manifest is run.

**Enable Reminders – Used with Autodial and OTS**

**Default Days Reminder** - Default used for a new customer added to a route for reminders of visits the day before they occur. You can set this to No, Email or Phone. Email requires a MAPI Email configuration and the Phone requires a Dialogic Card and configuration in SPOT.

**Show Tag Info On Manifest** – Garment tag information will be printed on the manifest when this setting is enabled.

**SPOTscanPC Manifest Mode** – This configures what types of visits will be uploaded to the SPOTscanPC device. You have the option of “Scheduled/Delivery Only” or “Full”.

**Average Stop Time** – Average time that a driver will take between each stop. This average stop time will be added to each stop to calculate the total estimated route time.

**Show Driver Message On Manifest** – Enabling this feature will display the following driver messages on the manifest. Not all manifest will display this information.

- NO CC ON FILE - This will display if the CC Usage is set to anything other than “Automatic”.
- INVALID CC - This is if the expiration date on the CCOF is blank, or incorrect format.
- CC TO EXPIRE - This is if the CC will expire in 30 days or less.
- NEW CUSTOMER - This is if the customer's first invoice visit date/time is 14 days or less.
- NO PAST ORDERS - This is if the customer doesn't have any orders.
- DORMANT - This is if the customer's last order was greater than 28 days and less than 70 days.
- LOST - This is if the customer's last order is 70 days or older.
- DECLINED CC - This is if the customer has any unresolved declined CC transactions (Regardless of whether it was for a route order or not).

Advanced Configuration Options

Advanced Store / Route Setting Options
You have many configuration options available that will allow the use of advanced options built into SPOT and route control. If you review the screen shot of Store / Route Settings you will notice several Nodes of interest that can be used in configuring your route operations.

These include Route Settings which are noted on the following pages.
**Pickup/Delivery Locations** – creating an item here will allow you to use “Customer Specific” rules and assign specific location information on the customer pickup or delivery tab.

Name – Name as displayed on the customer specific location line for pickup and delivery.

Description – Description of location.

Abbreviation – Not used at this time.

Other Data – If this is enabled it will change the on-demand location line to prompt for this specific data and use the “Description of Other Data” Meta setting as a prompt.

Description of Other Data – This is the label that will appear on the customer’s route specific location when this location type is selected.

You will notice in the example below that the Pickup/Delivery location is name “Garage” and is configured to prompt for “Garage Door PIN” in Meta settings. The next example shows the use of the “Garage” location in the customer’s Delivery / Pickup schedule.
On-Demand Time Ranges – This is a time range that has intelligence built in to allow for easy on-demand scheduling. If you do a lot of on-demand, this time range will assist you in getting customer’s pickup requests on delivery manifests in a timely manner. These definable time ranges are when an on-demand schedule is created and has nothing to do with when the customer wants it delivered. You have the following options available for delivery time ranges.

**Name** – Name of the time period. You will most likely use morning, afternoon, etc for these names.

**Visit Type** – Pickup or Delivery are the only options here. If the type is delivery it will show up in the delivery time in the on-demand scheduler and if set to pickup it will only show up in the delivery time window.

**Start Time** – This sets the starting time for the on-demand scheduler to evaluate what time period to use for scheduling.

**End Time** – This sets the ending time for the on-demand scheduler to evaluate what time period to use for scheduling.

**Day Offset** – The number of days to automatically add to the on-demand scheduler. If you have a morning time range and you will not be able to pick up an order until tomorrow then place a 1 for the offset. This will automatically add 1 day to today’s date and schedule the pickup / delivery for tomorrow.

For example; it is 9:00 am on Monday morning and a customer calls for a pickup request. The pickup time range is defined as “Morning” (8:00 am – 12:00 pm) with a 0 “Day Offset” defined. The automatic scheduled time for the pickup date for the order will be set to today’s date. If it was in the afternoon when the customer called it is too late to make the trip today for the pickup so the Day Offset is set to 1. The on-demand schedule will default the pickup request to Tuesday. The offset allows for time based scheduling with automated on demand scheduling. This works similar to the logic of our promised date schedule. If the order/pickup request is in by 10:00 am you get it today, if is after 10:00 am you get the request for tomorrow.

**Time Ranges** – Time ranges are used with the customers with Customer Specific route rules enabled. This will allow you to modify times for the customer and are for “visual support only” and these times have no logic based on your selection.
Name – The name of the time period.

Beginning Time – Starting time displayed on the customer specific route tab.

Ending Time – Ending time displayed on the customer specific route tab.

Allow User Modify – Enables this time range to be customized by the user by day, by starting and ending date.

Non-Delivery Reasons – Reasons for non-delivery of orders. These can be created by location and can have an attribute to require a change to the promised date of the order. This will automatically assign a CRM entry with the orders in question, date and time along the reason why it was returned to the plant for none delivery.

Name – Description of the Non-Delivery reason.

Prompt for new promised date – If enabled this will prompt for the order’s new promised date. This will then modify when the order will show up on the manifest.

Workstation / Mark-in Settings

Prompt for Counter / Route Order - This setting if enabled will prompt the clerk for “all” customer or just “route” customers if this Quick / Detail will be a counter pickup or a route delivery. This is used at the front counter so when a route customer comes to the store for a drop you have a simple way of getting these orders to route order or to be counter orders. If they are selected to be route delivery orders they will show on the manifest using your route configuration rules. If this is selected to be a counter order this will not be displayed on the manifest no matter what rules you have defined. If this order is a counter order it will suppress all printing of route and stop information on the order as well.

Workstation / Customer Settings

Verify Map Address - Setting this option will enable a button on the "General" tab of the "Customer View” screen, allowing the user to verify/map a customer address immediately as it is entered. This will allow you to Mappoint to verify an address according to Mappoint directly from the customers view. This handy when a new customer is added and can be verified prior to his first delivery.

Note: Microsoft Mappoint must be installed.
**Customer Settings**

**Customer Specific Route Rules** - Each customer on a route may have independent delivery and pickup options defined. This is done in conjunction with the configuration found at Store / Route Settings / Use Customer Specific Route. These options are only used if the “customer specific route rules” button is enabled for a customer. This option has the ability to optionally change route rules and operations by customer if enabled.

With customer specific route rules enabled for a customer they can now operate under individualized pickup and delivery rules based on the day of the week, delivery or pickup instructions.

- **Time Range** – What is the default time range this customer would like to have pickups and deliveries. This field has no logic for generations of your manifest or any other reporting. This field is for viewing only.

- **First Visit** – This date indicates the first time you intend on picking up garments for this route customer on the route. They will not show up on the manifest until this date.

- **Visit Day and Visit Type** – This information is used when using a static route with customer specific pickup and delivery rules. If this customer is a static route customer and he has Tuesday and Thursday scheduled on his route stop then he will show up on your manifest for pickup only on Tuesday and delivery only on Thursday. These settings are only active if you have the “User Customer Specific Route Rules” enabled for this customer.

- **Visit Day and Visit Type Start Time / End Time** – This is the preferred pickup or drop-off time range and is set with the “Time Range” Setting as mentioned above.

- **Pickup Instructions** – These are customer specific pickup instructions. The customer may have a separate pickup location from his delivery location. This specifies the type, address and location information along with special instructions for the pickup. Notice the location type is Garage in this example and the Garage pin number is enabled and viewable on the instructions. This along with the special instructions will print on the manifest. These setting are only active if you have the “User Customer Specific Route Rules” enabled for this customer.

- **Delivery Instructions** - These are customer specific delivery instructions. The customer may have a separate pickup location from his delivery location. This specifies the type, address and location information along with special instructions for the pickup. Notice the location type is Garage in this example and the Garage pin number is enabled and viewable on the instructions. This along with the special instructions will print on the manifest. These setting are only active if you have the “User Customer Specific Route Rules” enabled for this customer.
On-Demand Visit Cancellation – This is the current view of scheduled pickups, delivery or cancellations for the customer. These can be applied with the On-Demand scheduler or from this screen with the Add Button. You have the option to create a pickup, delivery, pickup and delivery or a cancellation. The cancellation is available to show when the customer is on vacation and will not be back until a certain date. The customer will not show on the manifest until the day after the date defined in the cancellation.

Show only pending entries – this is enabled by default. If you remove this check you will see all past history of on-demand items.

Running the Manifest
The manifest is the heart of the route delivery process. There are a couple of very simple rules that apply to generating a manifest.

Rule 1 – Orders that are promised or are ready will be included on the manifest. The option for only ready orders to be included on a manifest is definable by you as noted in the Company / Route setting as noted above.

Rule 2 – Customers will only be included on the manifest if there is a scheduled pickup or delivery for the customer defined for that day. This could be a date defined at the stop level on a static route or an on-demand pickup / delivery that has been scheduled.

Running the manifest is easy. You simply select the day you want to run the manifest, select what to include on the manifest (All Customers, Only customers with orders or scheduled stops) and the type of manifest to run (Detail or Summary) and you are done.

Here is a simple example of a manifest. Ron Jones is on Route 1, Stop 2. Notice he has a static schedule set for Monday and Thursday visits. We will run the manifest for next Monday the 24th with an option for a “Full Manifest” and run the detailed format.

Select the delivery date for the manifest
You will be prompted for what type of manifest to run and the number of orders that will be included on the manifest.

**Full Manifest** – Includes all stops scheduled for this day and will include all customers with static or on-demand visits assigned and will include customers with no orders promised or ready for this date.

**Scheduled / Delivery Date** – Includes all stops that have promised / ready orders or have an on-demand visit defined.

Select the type of manifest to print.

**Detailed Manifest** – Detailed line-by-line invoice detail including department, pieces, amount, owing and balance. This manifest includes line-by-line details for all orders due or ready for the customer along with the following features:

*Stop Number
*Defined days of the week for pickup/delivery
*Customer address and phone 1 and phone 2
*Delivery location and delivery instructions as defined by customer
*Customer Name
*Payment Method including “Overdue A/R”, Declined CC, Expired CC, About to Expire CC along with the customer A/R balance due if enabled
*Manual “Order Picked” up check box
*Manual “On Truck” and “Delivered” check box
*Order Number
*Department
*Pieces
*Paid amount
*Due amount, Location
*Location Code
*Time received
*Signature line
*Total Orders for the manifest
*Total Pieces for the manifest
*Total SOF amount due for the manifest
*Total Cash Due for the manifest

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<th>Phone 2</th>
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<th>Guest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jones, Tom</td>
<td>402 Oak Avenue Circle</td>
<td>(555) 555-1234</td>
<td>555-1234</td>
<td>Laundry</td>
<td></td>
<td></td>
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<td></td>
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<td>On Truck Yes</td>
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<tr>
<td>Invoice #</td>
<td>Department</td>
<td>Pieces</td>
<td>Price</td>
<td>Paid</td>
<td>Due</td>
<td>Location</td>
<td>Guest</td>
<td></td>
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</tr>
<tr>
<td>11-000001</td>
<td>Laundry</td>
<td>4</td>
<td>3.00</td>
<td>0.00</td>
<td>3.00</td>
<td>Retail</td>
<td></td>
<td></td>
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<tr>
<td>11-000095</td>
<td>Laundry</td>
<td>4</td>
<td>3.00</td>
<td>0.00</td>
<td>3.00</td>
<td>Retail</td>
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<td>Laundry</td>
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<td>3.00</td>
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<td>3.00</td>
<td>Retail</td>
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<tr>
<th>Vendor</th>
<th>Address</th>
<th>Phone 1</th>
<th>Phone 2</th>
<th>Delivery Location</th>
<th>Delivery Instructions</th>
<th>Customer Name</th>
<th>Payment Method</th>
<th>A/R Due</th>
<th>Pieces</th>
<th>Price</th>
<th>Paid</th>
<th>Due</th>
<th>Location</th>
<th>Guest</th>
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<tbody>
<tr>
<td>Brown, John</td>
<td>123 Main Street</td>
<td>(555) 555-2345</td>
<td>555-2345</td>
<td>Office</td>
<td></td>
<td></td>
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<td>Invoice #</td>
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<td>Pieces</td>
<td>Price</td>
<td>Paid</td>
<td>Due</td>
<td>Location</td>
<td>Guest</td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>11-000002</td>
<td>Office</td>
<td>3</td>
<td>5.00</td>
<td>0.00</td>
<td>5.00</td>
<td>Retail</td>
<td></td>
<td></td>
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<th>Customer Name</th>
<th>Payment Method</th>
<th>A/R Due</th>
<th>Pieces</th>
<th>Price</th>
<th>Paid</th>
<th>Due</th>
<th>Location</th>
<th>Guest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith, Jane</td>
<td>345 Elm Avenue</td>
<td>(555) 555-3456</td>
<td>555-3456</td>
<td>Daycare</td>
<td></td>
<td></td>
<td></td>
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<td>Department</td>
<td>Pieces</td>
<td>Price</td>
<td>Paid</td>
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<td>Location</td>
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<td></td>
</tr>
<tr>
<td>11-000086</td>
<td>Daycare</td>
<td>2</td>
<td>29.40</td>
<td>0.00</td>
<td>29.40</td>
<td>Retail</td>
<td></td>
<td></td>
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<th>A/R Due</th>
<th>Pieces</th>
<th>Price</th>
<th>Paid</th>
<th>Due</th>
<th>Location</th>
<th>Guest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Davis, Mike</td>
<td>789 Maple Drive</td>
<td>(555) 555-4567</td>
<td>555-4567</td>
<td>Office</td>
<td></td>
<td></td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>11-000003</td>
<td>Office</td>
<td>3</td>
<td>29.40</td>
<td>0.00</td>
<td>29.40</td>
<td>Retail</td>
<td></td>
<td></td>
<td></td>
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<td></td>
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<td>Total</td>
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</tbody>
</table>

Make sure door is locked after you leave.
Summary Manifest – A single line per stop shows total number of orders, pieces and due for the orders.

*This manifest includes a single line per customer for all orders due or ready along with
*Total Orders for the customer
*Total pieces for the customer
*Customer Name, Address and Phone
*Location
*Stop
*Amount Due
*Delivery Instructions
*Total Orders for the manifest
*Total Pieces for the manifest
*Total A/R Due
*Total SOF amount Due for the manifest
*Total Cash Due for the manifest

Optimizing the Manifest

All manifests may not be optimized with SPOTmap. This will optimize only those customers that are contained on the manifest. This manifest option is operated in the same manner as you would any other standard manifest. The exception to this manifest is that you will need to have Store settings > Route Settings > “Optimize Manifest” option enabled. A companion setting is Store settings > Route Settings > “Print Driving Directions”. With these enabled at the time you run the manifest you will be prompted to “Optimize” the route with SPOTmap including only those customers / stops on the manifest. These options will also display the driving directions from stop to stop on the manifest.

To run with this option and you have selected a Manifest date and type you will be prompted with the option to “optimize” the manifest as shown below. This will take all customers on the current manifest and optimize them with SPOTmap. If you select “No” from this screen the manifest will be generated using the stops as shown in the route manager.
The Post Orders Process is designed to make the delivery of orders and the posting to the customers A/R as simple as possible. The post orders works in conjunction with the last manifest generated for the route. For example; the driver generates the manifest at 9:00 am and then goes on deliveries. After the deliveries the driver returns with the manifest and has marked those orders that have not been delivered or scans the orders in the post orders screen. At that time you have all orders checked for posting that did get delivered. Press the post orders button to finish. If the driver ran the manifest at 9:00 and then another manifest was
generated at 2:00 with more orders, the manifest generated at 2:00 will be the orders included on the post orders screen.

**Process Step Configuration**

You have the option to apply a process interceptor called “On-Demand Scheduler” to any process step defined in SPOT. If you enable this process step for quick or detail you will be prompted with the On-Demand route scheduler after each order is completed. This will force the clerk to select a pickup or delivery for this order.

**The do's and don’ts configuring routes**

It is very important that you “do not” rename a route after it has been created and you have assigned customers to the route. If you do rename it your routes will stop working. If you do rename it simply rename it back to the original name. If you would like to rename a route, create a new route with the new name and use the “Move Stops” option to move the existing customers to the newly created route.

If you change the name of a Price table, Promised date schedule, or Tax Entity you will have to reset these items at the route level under Store > Route > Your Route.

Always enable route customers to the default tender type of A/R and assign a default billing group.

Do not generate a manifest in the morning that your driver takes for delivery use and then someone else generates a manifest for the same route later in the day that has additional items on it. The driver will come back and post orders with the last list of orders generated by the manifest and they may not have been delivered.

Always follow the rules defined for "Advanced Route Numbering” and do not randomly numbering when using this advanced feature.

**Rules for using the Advanced Route Numbering Options**

If you are looking at using the Company > Routes > Extended Stop Numbering you must be advised of these rules. Any variation of these rules will render your stops and reports as in accurate.

NOTE: These apply ONLY when customers are using Extended Stop Numbering.

Test Case:
Stop 1
Stop 2
Stop 3
Stop 4
Stop 5

**Rule #1** - You cannot change a stop's number to one that is already in use.

Example: You cannot rename stop 1 to stop 3.

**Rule #2** - You can change a stop's number, but it must be valid given the rules of decimal stop numbering.

Example: You can change stop 1 to stop 3.5. This will remove stop 1 and insert it between stops 3 and 4. You now have:
Stop 2
Stop 3
Stop 3.5
Stop 4
Stop 5

Example 2: Now that you have the new stop, you can change stop 2 to Stop 3.7, leaving you with:
Stop 3
Stop 3.5
Stop 3.7
Stop 4
Stop 5

The numbering follows the sequence below. This is done to prevent long decimal breakdowns (e.g., 1.5, 1.25, 1.125, 1.06125, etc.).

Stop 1
Stop 2

Stop 1
Stop 1.5
Stop 2

Stop 1
Stop 1.3 (closest odd next to .5)
Stop 1.5
Stop 1.7 (closest odd next to .5)
Stop 2

Stop 1
Stop 1.1 (closest odd next to .3)
Stop 1.3
Stop 1.5
Stop 1.7
Stop 1.9 (closest odd next to .7)
Stop 2

Stop 1
Stop 1.1
Stop 1.2 (evens fill in the gaps)
Stop 1.3
Stop 1.4
Stop 1.5
Stop 1.6
Stop 1.7
Stop 1.8
Stop 1.9
Stop 2

The same sequence can then repeat at the next decimal level (e.g., 1.4, 1.45, 1.5). SPOT allows up to two decimal levels of division.

**Rule #3** - You cannot change a stop's number IF the only result of the action would create a gap greater than 1 between stops.

Example: Given the original test case, you cannot change Stop 3 to Stop 2.5, etc. This leaves a greater than 1 stop gap between the stop numbers (e.g., between stop 2.5 and stop 4). This breaks SPOT’s ability to properly assign a stop between two other stops. Incidentally, the only time this would happen is when the stop number is changed but its relative position in the route stays the same (e.g., changing stop 3 to stop 2.5 does not change its position in the list, just its number).

**EXAMPLE - INVALID - NOTE GREATER THAN 1 STOP GAP BETWEEN 2.5 and 4**

1
2
2.5 - invalid - leaves a 1.5 gap between 2.5 and 4
4
5
It is suggested to use the INSERT STOP functionality more than the Edit Stop Number functionality, as SPOT will automatically recommend the correct stop number within the sequence on an insert.
SPOTmap – Route Level

Overview
Using the SPOTmap button on the route manager screen will allow you to generate to best case driving directions for the data selected.

The option below is just one way of using SPOTmap to assist you in the development of your routes and enhancing the efficiency of right turn driving. Also review the "Optimizing your Manifest" as discussed earlier in this chapter.

Setup
The first thing you will notice is a map with your store location displayed along with a map of your local area in the main body of this screen. If you see a map of Kansas with no location selected you will navigate to Setup > Location Information > Store Addresses > SPOTmap address and fill in your location and address information. Once this is updated exit SPOT to the desktop and return to the SPOTmap screen.

Navigational Tools
Once you have selected the “SPOTmap” button on your route you are displayed with the following options on the screen:

Zoom Out – Use this button to view a larger map of the local area in the space provided.

Zoom In – Use this button to view a closer, more detailed map of the area.

Jump to Store – This will allow you to quickly jump back to the original map location if you have used any of the navigational tools to view other areas of the map.

Select Mapping Criteria – Use this option to select the customer delivery days you would like to display on the map. Once you select your days it will populate the map with map able customer information. Those addresses that are not map able will be displayed on the screen.

Other options – Basic navigation tools available from the embedded map.
North, South, East or West  - From this view and other views we will discuss later in this chapter, place your cursor at the edge of the map, look for the large directional arrow and press your left mouse button. The will allow you to view and navigate other areas of the map very quickly.

Zoom – You have the option to zoom in on an area using the Zoom In or use your mouse and select a point on the map with your cursor and drag over the selected area. On the display you will see “Click to Zoom” on the selected area. Once you have an area selected press your mouse one more time and you will zoom in on the selected area.

SPOTmap – Customer Level

Overview
You a few options to assist you in using mapping technologies and providing map based information to your staff.

Verify an Address
You have the option to view any point on the map just by selecting a point on the map with your mouse. MapPoint will display any address / location it has mapped on the display at the point you selected. This is a great aid for those addresses that show as not map able by SPOTmap. You can review what MapPoint displays as the address you are attempting to deliver to. You can then substitute the address information displayed by MapPoint in the stop / customers route address field. This will then allow this non – map able field stop to be mapped according to an address that is valid in MapPoint.

Verify an Address via Customer View Screen
You a very simple option to use the “Verify Address” button located on the customer view tab. This option is only available with the Workstation Setting > Customer Setting > Verify Address option enabled. With the Verify Address window open navigate to the location of the customer on the map. Select the general area of the customer using zoom and pan options. Once you have the local area display select the location of the delivery address with a double click of your left mouse button. You will notice below that the selected address is listed in the bottom left corner of the screen.
Now select the "Use Address" button. This transfer the defined address to the customers address field. Choose close and you will see the updated address, city, state and zip code information updated automatically.

Suggestions in using SPOTmap

You must have an address that is resolvable in MapPoint in order for SPOTmap to work correctly. You will find that a simple change in the address format will generally give you the results you are looking for. For example, “512 East Clear Berry” will not resolve in MapPoint but “512 Clear Berry” will. It is suggested that you work with MapPoint standalone if possible so that you understand what it does and what address format it is expecting for map able addresses in your area.

If you do not have an area that is available in MapPoint do not give up on using SPOTmap. Many of the larger cities have 99.9% coverage while other developing or growing cities may not have newer subdivisions available. SPOTmap is still a very valuable tool if you have 60-70% of your address in MapPoint. You will want to use the “Linked Fields” option for the non-map able addresses.

If you find an address that will not map, open SPOTmap or MapPoint directly and zoom close to the location you are attempting to map and use the find feature (left mouse click on the map) and see the exact address that MapPoint is displaying. If you have a non-route customer that currently has an on-demand pickup/delivery they will show up as stop 9000 and higher.
Hotel Operations

Overview
The hotel feature is designed to provide management and reporting of Hotel / Valet deliveries. It will allow you to create a hotel, divisions and customers within the hotel. These setting will affect the way the hotel logic operates and reports are generated.

Initial Setup

Create a hotel-billing group.
2. Right click on Billing Groups and create new billing group.
3. Call it hotel (for example).
4. Click on hotel and choose edit.
5. Fill in the Billing Day, Due Day, Interest, etc.
6. Put check mark in Billing Entity, then select Hotel as Entity Type.
7. Click OK

Create the hotel.
1. Setup>Program Configuration>Store>Hotel Settings.
2. Right Click on hotels and create new hotel – example Holiday Inn - this will create the hotel.
3. Fill in the properties for this hotel including price table, the billing group, etc. Note: each hotel can have its own invoice template, which is defined here. This might include hard coding the address, hotel name, etc.
4. Click on the (+) sign to expand the hotel.

Create the divisions.
1. Right click on divisions and create the divisions – example guests, housekeeping, etc.
2. Fill in the properties for each division with name, abbreviation, primary discount percentage, and secondary discount percentage.

Spot Customer Setup

Create the hotel master bill entity
1. From the Home Page choose the Delivery tab on the left side and select the Hotel button at the bottom. Select the appropriate hotel from the list - example Holiday Inn
2. Choose Add Entry at bottom. This will bring you to the customer lookup screen
3. Begin typing the name of the hotel - i.e. Holiday Inn.
4. Add a new customer (Holiday Inn) with the following parameters:
   a. Type=Business
   b. Phone, Address, etc=filled in
   c. Save the new customer
   d. Edit Hotel Assignments page will come up. Select any division and set the following:
      i. Select any division (it doesn’t matter which one at this time)
      ii. Discount Information=Discount at Billing (This is where you apply the discount)
      iii. Mark-in Prompts=both disabled (This will let you select which prompt you want displayed)
      iv. A/R Account Type=Master (This is the only one which will be a Master)
      v. Select OK

Create the other hotel entities (Customers)
5. Add a new customer (Holiday Inn - Guest) with the following parameters:
a. Type=Business  
b. Phone, Address, etc=filled in  
c. Save the new customer  
d. Edit Hotel Assignments page will come up. Select the Guest division and set the following:  
   i. Discount Information=Discount at Billing (The $ field is the threshold at which the secondary discount kicks in)  
   ii. Markin Prompts=both enabled  
   iii. Account Type=Sub  
   iv. Select OK

6. Add a new customer (Holiday Inn - Employee) with the following parameters:  
a. Type=Business  
b. Phone, Address, etc=filled in  
c. Save the new customer  
d. Edit Hotel Assignments page will come up. Select the Employee division and set the following:  
   i. Discount Information=Discount at Billing (The $ field is the threshold at which the secondary discount kicks in)  
   ii. Markin Prompts=Prompt for Name  
   iii. Account Type=Sub  
   iv. Select OK

7. Continue adding customers with the above examples until all are complete.

**Detailing Invoices**

1. Enter the Detail function as you would for any other customer. Search for the name that you want – example Holiday Inn-Guests.  
2. Detail the order as you any other order.  
3. When you select finish, you will receive a prompt asking for the Guest’s name and room number.

**Delivery**

1. From the Home Page choose the Delivery tab on the left side. Select the hotel button at the bottom>select the appropriate hotel from the list – example Holiday Inn.  
2. Select the Delivery Manifest button at the bottom.  
3. Select the appropriate date for delivery.  
4. This will now create the delivery manifest with all orders grouped by Hotel Division  
5. The next step is to Post the orders to the Hotel for billing.  
   a. Select Post Orders button.  
   b. All orders will have a green check mark next to them. (This will post all orders at once. Any order you do not want to post at this time, simply remove the check mark.)  
   c. Select the Post button. It will tell you how many to post and ask to post now. Say yes. Then OK.

6. The Hotel Sweep button is to provide a means of making sure that no orders fall through the cracks and don’t get charged to the hotel. Perhaps just prior to actual billing, you should run the sweep function.

**Billing**

1. Select the A/R Tab on the left hand side.  
2. Select Hotel Statements from the A/R Menu.  
3. Select the appropriate store, billing group, closing date, due date, etc.  
4. NOTE: Trial statements will let you see what you are going to get, but doesn’t actually create the statements.
5. Select Create Statements. This will display how many meet the criteria and ask you to proceed. Select yes.
6. Choose View and Print Statements. This will let you actually print the statement for the hotel.

**Receiving Payments**

1. Select the **A/R Tab** on the left hand side.
2. Choose **Apply Payment** from the A/R Menu.
3. Choose the Master Account for the Hotel - example Holiday Inn.
4. You apply payments as you would any A/R customer. (If the amount of the payment is sufficient to close invoices, it will do so beginning with the oldest. If the amount is not enough to close invoices, it will keep that amount as a credit balance until a sufficient amount is available).
Restoration Operation

Overview

We have created several key features in SPOT for you to take advantage of and leverage your use of SPOT in the processing of Restoration work. You will manage the Detail of orders much the same way as you process your over the counter, route and hotel operations. The big difference in restoration work is the use of date sensitive adjustments, reporting and billing. Here is a list features that may be used to enhance your “Restoration” operations.

Detail Process

Manual Splitting

Many users choose to split invoices at 6-8 pieces at the front counter. You may choose to create a restoration price table and have larger quantities on each invoice. We do not recommend any more than 25-30 line items on an order. This invoice splitting option can be modified at the department group level of your price table. Take advantage of the “Split” button at the bottom of the detail screen to override any defined splitting you may have setup for each department. An example is you may have napkins under household and have 5 pieces to an invoice. If you have 15 napkins you may not want them on three separate invoices. Detail all 15 napkins and hit the “Split” button. This will generate a new order with all 15 napkins on the order and leave you in the detail screen ready to detail more items. This is handy for stuffed animals, odd sized objects, small or one-of-a-kind items found in restoration work.

Automatic Order Splitting by Department

Department based intelligent splitting can be defined by Department or can be overridden by the manual split button as noted above.

Department splitting can be configured at Company Settings > Mark-in Settings > Price Table > Your Price Table > Department Group > MaxPieceCount.
Invoice Mode Operations

This allows an entire invoice to be assigned a type of order and automatically assign promised dates. Examples of Invoice mode are Standard (default), Rush, Next Day, 2 Day, Redo etc. Invoice modes are configurable by you. The example below shows the invoice using the “Next Day” invoice mode. Comments can be printed on the invoice to show the invoice mode.

Invoice Mode types are configured under Company Settings > Invoice Settings > Invoice Modes.
“Rush” Item Level Adjustments

At the item level you can apply an adjustment that will automatically add or remove user-defined days to the promised day schedule and optionally print tags to a “Rush” lot. These item adjustments that modify a promised date will automatically trigger invoice splitting because of promised date differences. This “Rush” option can also print to a printer loaded with “Rush” tag stock giving maximum flexibility with production control.

Item adjustments with Rush or Promise Date offset can be configured at Company Settings > Mark-in Settings > Item Adjustments.

Invoice and Invoice Label Options

User Definable Invoice Layouts

SPOT has a very complex template editor allowing you to make changes to your invoice template with pre-defined fields. SPOT comes with five different invoice templates that can be used or modified at any time.

Invoice layouts can be defined and modified in Company Settings > Document and Report Settings > Invoice Layout. Please contact technical support before attempting to modify templates on your own.

Use of any invoice template can be modified at the workstation level with Workstation Settings > Report Settings > Printer Assignments > Invoice.

Invoice Label Creation

Instead of using a paper invoice on your packaging you may choose to print an invoice label. This label will include customer name, phone, address, invoice number, number of pieces or any other type of information you may choose to include.

Invoice labels can be defined and modified in Company Settings > Document and Report Settings > Invoice Label. You will also need to setup a “Process Interceptor” for invoice label to operate. Please contact technical support to create this process interceptor and before attempting to modify the invoice template on your own.
Prompt for Order Promised Date

You have the option to prompt for an order promised date when splitting or finishing an order.

Store Settings > Mark-in Settings > Prompt for Promised Date after Detail

Process Steps

Scan orders / items into a process step or location for tracking and reporting. SPOT allows you to process invoices and to follow a configurable workflow. This workflow may have optional steps or may force certain process steps to be followed in your operation. This workflow setting can be assigned by department. You will see who, what, where and when of your current orders. Here are just a few examples of process step types.

Orders – Detailed, Out Source, On Truck, In Storage, Remote Storage, Packaging, Racked, Delivery Confirmation, Sold etc.

Items – Spotter, Presser, QC, On assembly conveyor, Off assembly conveyor etc.

Process steps can be created and modified at Company Settings > Work Flow settings > Process Steps. You will also need to modify your “Workflow” template to incorporate any of these steps. Please refer to “Understanding Workflow in SPOT” before attempting to make modifications to these items.

Processing steps can be implemented with manual entry or a scan of an invoice or items barcode. You can take advantage of current SPOT Process Steps with technology using your current PC, PC with Barcode reader, PC with remote barcode reader, SPOTScan, SPOTScanPC or SPOTLink.

SPOTScan – Palm OS based remote device that can run Process Steps, Inventory, Racking and Ready orders backup.

SPOTScanPC – Mobile Windows based device that can run Process Steps, Inventory, Racking and Electronic Route Manifest.

Process Steps and Reporting

SPOT allows you to report on what is in a process step or what is missing from a step. Use our pre-defined reports or have SBS create custom reports tailored to your process step workflow needs. Here are just a few examples that CRDN suggests that you use. You can go to either the Quick reports menu and select “Restoration” or go to the Report Gallery and select “Restoration” to print these reports.

Delivery Report by Customer – All detailed or ready orders for a customer.

Orders by location – All orders in a given location. Report prompts for a location to search. Any items found at this location for this customer are included on the report.

Current Orders / Location by Customer – All orders for a selected customer with location information including the date when the invoice entered the location.
Process View Screen

The Process View screen can be viewed from the “Home Page” under the Process tab. You can see every order in process and at what process they are in. This lets you see how many orders / items are in a specific process. You can select any of these process steps from the screen to display current orders and order detail.
Customer Price Level

Use level 1-5 to customize pricing for a customer or contractor. This will correspond with the “Level x” pricing option at the item level and gives you endless flexibility for pricing per customer or per job.
Generating a Manifest

You can go to either the Quick reports menu and select “Restoration” or go to the Report Gallery and select “Restoration” to print manifests. Each manifest type can be run in either detail or summary mode. Detail mode will show you all item details including color, patterns, brand, Upcharge etc. Summary mode includes item name only.

**Customer Manifest** – Includes only item and piece counts. No pricing is included.

**Billing Manifest** – Groups by Department, includes item and piece counts, item price, average price (if enabled), and totals for all columns. Prices included on this manifest are in gross dollars.

**Contractor Manifest** – Includes item and piece counts, item price, average price (if enabled), discounts and totals for all columns. This manifest shows applicable discounts as a separate line item and includes gross dollars for invoices at the line item level. This grand total reflects the net amount of all invoices after discounts.
**Insurance** - Includes item and piece counts, item price, average price (if enabled) and totals for all columns. This manifest does not include any discounts in the amounts of this report. This total reflects the gross amount before discounts.
Accounts Receivable / Billing Entities - This is an advanced feature of A/R and the use of billing groups. This allows you to have multiple jobs running for a single contractor or insurance company that you do direct billing with. At the end of the month simply create a statement for all jobs for that particular contractor or insurance company. You will get a total for all jobs with job detail and subtotals for quick and easy review.

Billing entities are configured at Company Settings > A/R settings > Billing Groups > Select Billing Group > Choose the “Billing Entity” check box.

You may also use the “Till To” address at the entity level. This will allow you to have a different mailing address for the statement other than the master account’s address. You can use the regional or corporate office’s billing address to override the customer’s address.

You may also take advantage of “Billing Discount”. This will show as a single line item at the end of the statement for the percentage defined. This lets you keep the retail price on the invoices and manifests but deducts the percentage of any commissions charged by your contractor.

Flexible Manifest Printing – You have the choice of four different types of manifests: Customer, Insurance, Billing and Contractor. Each manifest can be run in detail mode or summary mode depending on your requirements.

Discounting Restoration Orders

In SPOT you have the option of discounting or adjusting prices at the item, invoice, statement or billing entity level. Depending on what and how you want the discount to display to the customer, contractor or insurance company will depend on what type of discounts you use. Listed below are different ways you can use discounts in your restoration operation.

Item Adjustments

Item adjustments that affect price will show up on the VI as the full price and also show the adjustment amount. The item level adjustment will flow to the manifest and statement with the net price of the item. For example you have a $10 item that has a 10% adjustment. The VI will show both the $10 item and the $1 adjustment on separate lines. Depending on your invoice layout you may see the transaction just like the VI or you may not see anything but the net amount of $11. Statements show the net dollars of the invoice.

Invoice Adjustments

Invoice adjustments that affect price will show up on the VI as invoice adjustments at the bottom of the VI. The invoice adjustment will flow to the manifest and statement with the net price of the item. If you are running the contractor manifest you will see a line item at the bottom of the manifest for each invoice adjustment and the dollars associated. For example you have a $10 item that has a 10% invoice adjustment. The VI will show both the $10 item and a $1 invoice adjustment. Depending on your invoice layout you will see a line item for this adjustment for $1. Statements show the net dollars of the invoice.

Discount groups

Discount group adjustments will show on the VI as discount groups at the bottom of the VI. The discount will flow to the manifest and statement with the net price of the item. If you are running the contractor manifest you will see a line item at the bottom of the manifest for each discount group and the dollars associated. For example you have a $10 item that is part of the contractor discount that is set to be 10% off, the VI will show both the $10 item and a $1 discount group discount and depending on your invoice layout you will see a line item for this discount for $1. Statements show the net dollars of the invoice.

Statement and Entities Discounts
Statement and Entities
Discounts will not show on any invoice or manifest. They are only applied at the time of the statement run. These are adjustments that are applied as an A/R Adjustment for the price of the discount. If you have a discount set for the A/R customer of 10% and generate a statement with $100 worth of gross dollars you will see a line item on the statement showing the $10 discount. You will also find a corresponding A/R adjustment posted to the account for $10. This makes it easy to bill the customer at full retail cost on the manifest and then send the bill to the contractor or with the gross dollars less the 10% referral fee. You do not have to adjust any invoices, just apply the $10 A/R credit towards the payment of the job.

Batch Mode operations

Batch Operations allow you to make changes to promised dates or void orders for a given customer’s orders in batch mode. You can use “Batch Operations” any time you have a search results screen and makes changing 100+ invoices promised dates a snap. Please use this with caution because these changes are not reversible. This operation is only available to users who have the “Batch Operations” security right enabled.

To use this option do a search by customer and from the search screen you select the “Batch Operations” operation from the bottom of the search screen.

Once Batch Operations is selected you will see all orders returned in the search screen automatically selected in the batch operations window. You may choose to use all selected or remove check marks from those orders that you do not want to apply the batch operation. Once you have the items checked that require the operation press the “Select Operations” button.
You are now prompted for what operation to perform on the selected invoices. Please be careful at this time and use the Void operation with care. This operation is not reversible.

Pickup and Pay later

At order pickup you have an option definable by security to allow a customer to pickup an order and not pay for the order. This is another option for rush delivery orders if you are not using A/R.
Include Department In Manifest Grouping – This setting will display the Department name on each group header of the manifest if enabled. This setting does not affect the billing manifest.
Include Item in Manifest Grouping – This setting will use the item name for grouping on the manifest and will display the item name on each group header on the manifest. This will also show each item as a manifest header. This setting does not affect the billing manifest.
Manifest Apply Date – When you run a manifest you use a date range to select what invoices to include on your manifest. The setting lets you choose what date on the order you would like to use in the date selection. You have the option of using the order’s “Promised Date” or the order’s “Detail Date”.

Order Upcharge’s First – (On / Off) Display the items Upcharge as the first item on each line of the manifest or to show the Upcharge at the end of each individual line.

Prompt for Manifest Label – (On / Off) As you run the manifest you will be prompted for Manifest Label information. If you use Manifest Label Description of “Order” or “Job” then you would be prompted with this label to enter the number at this time. This information would be included on the top of the manifest.

Manifest Label Description – If you have enabled the “Prompt for Manifest Label” option this is the Text / Label information that will appear at the top of the manifest. This is usually “Order”, “Job” or “Contract”. 
Select Invoices for Manifest – On / Off - When running your manifest you will be prompted to select what customer invoices will be included on the manifest. By default all invoices are selected.

Show Average Price Per Item – Displays the average price per line item on the manifest. This is very useful for adjustors to review your manifest and see what you are charging by line item or garment type. By default the average item price is not included on the Customer manifest.

Restoration Specific Reporting
These reports are available on the “Quick” report menu “Restoration” or under
- Current Orders / Location by Customer – Report that allows you to see what orders a customer / job may have and the location of each order. This is a very helpful report to track the process of the entire job. You may have 20 orders in the job and 10 of the orders are ready. You will be able to track the department of the order, when the order was detailed, racked along with the location of the order. This report will show you the status and location of all orders for the job.
- Delivery Report by Customer – The delivery report is similar to the Current orders report as noted above with the exception of few fields. This report is run at the time an order / job is to be delivered. It will give the delivery crew a list of all orders and the status / location of each order for delivery. Use this as a pick list if you will.
- Orders by Location – This report will prompt you for a specific location to search. An example would be show all orders in the “Long Rail” or “Shelf” for a given customer or job.
- Orders by Comment – This report uses order comments containing the word “Room” and groups them accordingly. As you detail orders and apply an order comment of “Bedroom 1” and others with “Bedroom 2” this report will group all orders by bedroom number. This is another great report for delivery so you know what rooms the goods came from and need to go back to.

Restoration Customer Logic
This logic was created to assist in the collection of room information at the time orders are being detailed. To enable this logic you will need to configure Restoration logic in settings and then set the customer as a restoration customer. This logic also provides logic for offloading orders from MetalProgetti storage by room name saving you time in sorting orders for delivery.
- Specify the Restoration settings with Setup > Program Configuration > Company Settings > Restoration Settings.
Create Room Types to be used during the Detailing process by going to Setup>Program Configuration>Company>Restoration Settings>Rooms

- Create new Room Types within the system. Some examples of this could be: Bedroom, Master Bedroom, Bathroom, Kitchen, Closet, Basement, Living Room, etc. Note: It may be a good idea to create a Room Type called ‘Other’ in the case of companies that do not organize their restoration by rooms; this will allow further descriptions to be entered during detail. This will prevent the system from being cluttered by Room Types that are job specific.
  - The Room Types are stored by name.
  - Note: While these can be deleted/renamed without causing a failure within the program, it is never suggested.

Create Contractors to be specified at the customer level when creating a Restoration customer by going to Setup>Program Configuration>Company>Restoration Settings>Contractors

- Create new Contractors within the system. These are contracted companies that may be performing tasks on the Restoration job. These can be things like Leather Cleaners, Alterations Companies, etc.
  - The Contractors are stored by name, as well as an optional description field.
  - Note: While these can be deleted/renamed without causing a failure within the program, it is never suggested.

Create Insurance Companies to be specified at the customer level when creating a Restoration customer by going to Setup>Program Configuration>Company>Restoration Settings

- Create Insurance companies that may be associated with the various Restoration jobs.
  - The Insurance Companies are stored by name, as well as an optional description field.
  - Note: While these can be deleted/renamed without causing a failure within the program, it is never suggested.

Create a new Restoration Customer (Or update an existing customer to be a Restoration Customer)

- Enter the Customer View Screen, and select the Details Tab.
  - Use the toggle button located in the bottom right to define the customer as a Restoration Customer. By default this will be ‘Restoration Customer: No’. When you select the toggle button you will be prompted by a ‘Customer Restoration/Job Information’ screen. Note: As of SPOT Version 06.00.0043 the only setting within the ‘Customer Restoration/Job Information’ window that is associated with anything in SPOT is the Job Number. All other fields are optional.
    - Job Number, this is a required field. This can be any value or can be copied from the Customers ID number by using the ‘Copy from Customer ID’ button located to the right of the Job Number field.
  - Billing Method: This dropdown box has three options.
    - A/R: This customer will be billed through an A/R account.
    - Carrier: This setting would be used if the Restoration Job will be billed through an Insurance Company.
    - XactaMate: This is a large insurance broker who provides pricing for specific areas/regions.
  - Salesperson: This field can be used to specify a salesman or project lead for the Restoration Job.
  - Job Description: This field can be used to add miscellaneous details regarding the Restoration Job.
  - There are various dates that can be specified and ‘checked’ when marked complete. The Created date cannot be changed, but it automatically set to the date that the customer was setup as a Restoration Customer. There is also an ‘Estimated
Completion' date that can be used for tracking purposes, as well as a Quoted, Packed, and Delivered date.

- The ‘Contractor’ tab has fields that can be used to populate contact information for the Contractor that has been assigned to the Restoration job. The Contractor Name drop down menu will display a list of Contractors that are setup in Program Configuration as mentioned above.

- The ‘Insurance’ tab has fields that can be used to populate contact information for the Insurance Company associated with the Restoration Job. The Insurance Company drop down menu will display a list of Insurance Companies setup in Program Configuration as mentioned above.

Once a customer has been setup as a Restoration customer, you can begin detailing orders. When you detail an order (not when you quick an order), you will be prompted with a window requiring you to define a Room Type that has been setup in Program Configuration, as well as an optional description field and these fields can be seen in the visual invoice.

- Note: The visual invoice now has a ‘RESTORATION’ flag indicating that the invoice is assigned to a Restoration Customer.

- Note: Currently there is not a way to reassign or redefine the Room Type or Room Description once an invoice has been detailed.

- Note: The Room Type and Room Description can be added to an invoice template within Program Configuration using the data nodes called ‘Restoration > Room’ and ‘Restoration > Description’.

MetalProgetti – Offload Functionality

- A new feature has been added with the Restoration Customers for companies using a MetalProgetti Storage Conveyor. When using the Conveyor Operations Offload Option (Menu > Conveyor > Operations > Offload), the clerk can now select a Room Type to offloaded as well as the existing options of specific Stores, Routes/Hotels and Customers. There is also an option called <All Rooms> that will offload all orders for the Restoration Customer sorted first by Room, and then by invoice number. (Note: This option will only appear if the customer is setup as a Restoration Customer.)
Users, Groups and Security

Overview

Security in SPOT is based on employees and a unique PIN number associated to the employee. We currently offer three different models of security: PIN per transaction, PIN Logon with Timeout, or No Security. The difference in the PIN-based methods is simple, the PIN per transaction mode requires the employee enter their PIN for every transaction that is made within SPOT. The PIN logon method is nice in that the employee can Logon one time with his or her PIN and continue to be un-interrupted with PIN prompts. The employee is required to logoff the workstation when he or she is finished using the workstation. The screen below shows the Home Page with PIN Logon with Timeout enabled.

PIN Logon with Timeout is the most convenient mode of security but the PIN per transaction is the most secure. With either of the PIN-based security methods each user will be supplied a unique PIN number for use that will identify every move they make in SPOT. The user manager in SPOT has been created to allow easy access and configuration of users, groups and security rights. SPOT maintains a list of users that have many different configuration choices including the following options:

- **General User Information** – full name, employee initials for reporting, PIN number, social security number, birth date, hire date, termination date and the status of the employee.
- **Operation Settings** – Detail Screen of choice, forced logon and pop up window type.
- **Time Clock** – Pay rate for regular hours, pay rate for overtime hours.
- **Activity/Security Rights** – What will the employee be able to access and what operations will be available for the employee to use (see detailed list).

Understanding how SPOT looks at users, groups and rights is important. In the current version of SPOT you will only see employees in the user manager that are assigned to the store you are logged into. If you only have one store this is not an issue, if you have multiple stores and are running in a centralized model this will affect you. If you want centralized control of employees from the corporate office you will want to create all users while logged into the corporate store. If you are looking to have store level management of employee information you will want to create the users in the specific stores that they work. An example is that you just hired a new employee to work at store #3. You will logon to store #3 and create the user. This will allow the store to see and modify the user information via user manager. If this same employee was created in the corporate store the user can go anywhere in the enterprise and use his or her PIN but you cannot manage user information logged into store #3, only while logged into the corporate store.
Creating a New User

As noted in the chapter “Where to Create a New User” we discuss the process and logic for creating a new user. To create a new user you will use (from the tool bar) Setup / Users, Groups, Rights. Once in the User Manager you will see only those employees for this local store. Notice this list is sorted alphabetically by last name for easy use of finding an employee.

Before we create or modify a new employee please review and understand the settings that you will be using in employee management. Here is a list fields found on the Users tab.

Users List – List of current employees defined in the store sorted by last name, the number in parentheses is the principle store of the clerk.

Add a New User – This button is used when you want to create a new user. This is not used to modify, only to add a completely new employee.

All Stores – With this field check you will see users from all stores. If this option is grayed out you do not have the activity right to view clerks from other stores.

Show only Active Users - With this field checked you will see only users that have a status of Active. This makes it easy to see only those employees that are currently employed at your store and still gives you easy access to terminated employees.

Last Name – Last name of the employee (required field).

First Name – First name of the employee (required field).

Initials - This is usually a 3-character initial of the employee’s name. For example the employee named Ted Steven Jones would be TSJ as in the example above. We also have had customers use a 3-digit number for the initials. These initials are displayed in production reporting, invoice history logs and the activity logs. These initials are very important because they link an employee to a transaction.

SSN/Employer ID: Optional field and can be left blank. The contents of the field will print on time clock reports if available.

Birth Date: Employees birth date.
Logon Name: This is a required field and must be entered. A suggestion for a logon name is the first name and the initial of the last name. As noted in the example above Ted Jones has a logon name of TedJ. This must be unique across all users in your company. This name is only used by an employee when using the “logoff” functionality from the Home Page.

PIN: This is a unique ID that an employee will use to operate in SPOT. Each time a SPOT process requires a PIN the employee will have to supply this number. This number can be from 1-8 digits in length. The more digits the more secure the transactions. This is a required field. You also have the option of using the Generate 4 or 5 digit pins by selecting the button next to the PIN field.

Password / Confirm Password: This is used in conjunction with the Logon Name for an employee. It is only used if you use the “Logoff” functionality but is a required field. These fields must match in order for the employee to be saved.

Email: Employee’s Email address.

Hire Date: Date the employee was hired, used for historical records only and is not required.
Term Date: Date the employee was terminated, used for historical records only and is not required.

Principle Store: If you are running SPOT in a centralized model each user has a principle store. This store is the home store of the clerk. The clerk can be moved to any store with the user manager. If a store manager does not have the right to look at clerks in other stores, then move the clerk they are attempting to modify to that manager’s store.

Assigned Group: This is the security group the employee will be working under. You have the option to assign an employee to any of the defined security groups. By Default SPOT comes with groups defined for Accounting, Admin, Assembly, Counter, Manager, Mark-in, Owner, Production, Quality Control, and Time Clock. This is a required field and you must select a security group for every employee in the system.

Status: This is the current employment status of the employee. The options are Active, Inactive, Pre-Employee, Probation, and Terminated. This is a required filed and in order for an employee to operate SPOT they must have an “Active” status.

Std Hourly Rate: The hourly rate you pay your employee. This is used for production and cost reporting and is not a required field.

OT Hourly Rate: The hourly rate you pay your employee for overtime hours worked. This is used for production and cost reporting and is not a required field.

Activity Settings: Select this button to set employee options as follows.
**Activity Settings Screen**

This screen is accessed via the user manager “Activity Settings” button located at the bottom of the screen.

**Mark-in Method** – By default this is set to “Use Site Default”. This will use the store’s default settings as to what Detail/Mark-in screen the employee will use. We currently default all employees to use the default “Touch Screen – Extended”. We also use have support for the soon-to-be-retired Touch Screen, Single Screen, Standard and Keyboard.

**Force Clock-In** - This will require the employee to use the time clock and punch in before any access to SPOT is allowed. By placing a check in this field will force the employee to punch in via the time clock before using the system.

**Popup Window Mode** - This will change the method that window dialog boxes appear in SPOT. The options here are Full Screen and the default of Normal Size. The screens that are affected are PIN dialog boxes, error messages etc.

**Save** - This button must be used after an employee has been created or modified. If you do not use the Save button before hitting the Close button any changes will not be saved and you will have to re-enter the employee.

**Cancel** - This button will cancel any changes made to the employee’s profile without saving them.

**Close** - This will exit you out of User manager and return you to the Home Page. If you have made any changes to users, groups, rights you will need to exit SPOT in order for them to take effect. If you do not exit SPOT, new users will not be available and changes made to existing users will not be available.

Now let’s create a new user.

**Step 1.**

Select the “Add a New User” button at the bottom of the user list. You will now see a completely blank form waiting for employee information. Remember that the Last Name, First Name, Initials, Logon Name, PIN, Password, confirm password, Assigned Group and Status are required fields for this process.

**Step 2.**
Once you have all the fields entered you will need to “Save” the employee information. Once you select the Save button you now see the employee in the Users list.

**Modify an Existing User**

To modify a user is simple. Navigate to the Home Page > Setup > Users, Groups, Rights and then select the user you would like to modify. Once changes have been made make sure you use the Save button. If you choose to not make any changes to the user you will need to select the Cancel button in order to exit editing the current user. If you do not press the Cancel button you will not be able to select another user for modification.

**Groups**

Groups allow you to manage security with ease. Rather than having a messy security matrix per user you can associate a user to a group and have the user inherit security rights from the group. Your SPOT installation has several industry standard groups pre-defined and configured. These groups can be modified or added to at any time.

**Adding a New Group**

To create a new group enter Setup / Users, Groups, Rights and then select the Groups tab. You will see the Groups screen displayed as noted below:

Fields to understand on the Groups tab:

- **Groups** – Current list of all groups available sorted alphabetically.
- **Add a New Group** – This button is used for creating a new group.
- **Name** - This is the name of the group. This can be changed at any time using the modify group process.
- **Comments** - This is an optional field containing a brief description of the group selected.
- **Activity Settings** - Not applicable and has no use at this time.
- **Save** - This button must be used after you create a new group or modify an existing group. If you choose Close prior to select save you will lose all changes made to the group.
- **Cancel** - Not applicable and has no use at this time.
User Membership - This is the list of current users/employees in the system. By selecting a group from the group list you will see what users are associated with the group. An employee will be associated to a group when the box next to the employee has a check mark in it. Users associated to a group will inherit security settings defined for that group. A user can be associated to multiple groups from this tab so be careful not to unintentionally associate a user to multiple groups. A user associated with multiple groups will inherit all rights granted in the associated groups. An example is that a counter employee has been associated to both counter and Mark-in. The employee will inherit all rights of the counter group and all rights of the Mark-in group. The association of users to multiple groups will at some point cause confusion with security so be careful if you choose to use the Group tab to associate users to groups. For simplicity it is suggested that you use a single group and use the Users tab Assigned Group option to apply users to groups.

Close - This will close and exit the User Manager utility and return you to the Home Page.

Modify Existing Group
You may modify current group information just by selecting the group from the list and making the changes to name or comment. If you make changes to the group name or comments you are required to use the Save button for this to take effect.

Activity Rights
As noted in previous chapters SPOT users are associated to Groups to control Security and user access. Once you have a Group defined you must associate Activity Rights to a group. Modifying Activity Rights is done in Setup / Users, Groups, Rights and then select the Activity Rights tab. You will see the Groups screen displayed as noted below:

![Activity Rights Screen]

The process of assigning Activity Rights is very simple. You select the group from the left column (Authorized Users/Groups) and then select what rights (Activity Rights) this group will be associated with. To associate an Activity Right you will simply select the box to the left of the right description and a check mark will appear. Once the checkmark is associated you will have this right associated with a group. There is no saving of the setting changes required. Once the check mark is in place it is saved. If you later decide to remove a right, just select the box and remove the check mark.

The most difficult part of security is understanding the list of Activity and System Rights. Listed below are current Activity Rights available with descriptions.

Batch Operations
Change Promised Date – Allows use of Change Promised Dates within the Order Search/Batch Operations.
Rack / Processing Step – Allows the use of the batch “visit” operation located on the racking screen.

Void Invoice – Allows use of Void Orders within the Order Search/Batch Operations dialog.

Cashier

Allow Pay Later at Pickup (PNP) – Allows use of the Pickup Pay Later (PNP) feature at Order Pickup.

Allow Reverse Pickup – Allows the user to reverse the payments and A/R credits on an invoice. By reversing the order it also reverts to detailed status. This function is available from the F3 “Menu”.

Apply A/R Payments – Allows the user to apply a payment to a customer’s A/R account.

Cancel Cashier Sessions – Allows the user to delete customer pickup sessions (used only with Central Cashiering).

Cancel Drawer Check in/Checkout – Allows the user to cancel a Drawer Check in/Checkout.

Check Out/In Cash Drawers – Allows the user to Check in/Checkout a cash drawer.

Discount Pickup Session – Allows use of the “Discount” feature at Order Pickup.

Edit Drawer Checkout – Allows the modification of a drawer check out session utility.

Issue/Revoke Cash Credit – Allows the user to modify a customer’s cash credit balance. This function is available from the F3 “Menu”.

Modify Reconciliation Reports – Allows the user to specify the reports to print from the Reconciliation screen.

Perform A/R Adjustment – Allows the user to add A/R adjustments to a customer’s account.

Perform Credit Card Adjustment – Allows the user to apply a defined Credit Card Adjustment to a customer’s credit card. This is not tracked other than reported in SPOT. This is available from the F3 “Menu”.

Perform Payin – Allows use of the Payin function. This is available from the F3 “Menu”.

Perform Payout – Allows use of the Payout function. This is available from the F3 “Menu”.

Print X-Report – Allows the user to print an X-report from the Drawer Checkout option. The X-report shows the user a drawer’s over/short totals without resetting the counts (as with the Z-Report).

Remove Selected Items at Pickup – Allows the user to unmark an order for pickup that was marked by default.

Use Gift Card Manager – Allows the use of the F3/Menu Gift Card Manager

Use Restricted A/R Adjustment Reasons – Allows use of “Restricted” adjustments. The restricted option is specified for each A/R Adjustment in Program Configuration->A/R Settings->A/R Adjustments->Restricted.

Use Restricted Cash Credit Reasons – Allows the user to apply a “Restricted” Cash Credit. The restricted option is specified for each Cash Credit item in program configuration.

Use Restricted CC Adjustment Reasons – Allows the user to apply a “Restricted” CC Adjustment. The restricted option is specified for each CC Adjustment item in program configuration.
Use Restricted Payin/Payout Reasons – Allows use of “Restricted” Payin/Payout items. The restricted option is specified for each Payin/Payout in program configuration.

View Cash Reconciliation – Allows the user to view the Cash Reconciliation screen, accessible from the System tab. This setting is required if you grant an employee the Modify Reconciliation Reports right.

Conveyor

Run Conveyor Operations – Allows the user to use the Tools > conveyor operations utilities.

Customer

Add CRM Contact – Allows the user to add CRM (Customer Relations Management) entries to a customer’s record. This is located on the CRM tab in Customer View. This right is used in conjunction with the “View CRM Tab” activity right.

Allow Reassigning Invoices – Allows the user to reassign an invoice to a new customer. This right is used primarily when an employee details an order to the wrong customer.

Allow Reassigning Sold Invoices – Allows the user to reassign sold invoices to a new customer. This right is used primarily when an employee details an order to the wrong customer and subsequently sells the order. A reverse payment operation will take place prior to the reassignment.

Change Customer ID – Allows the user to modify an existing customer’s ID field. This option is enabled only during use of the Customer Maintenance option from the F3 “Menu”.

Change Discount Group – Allows the user to change a customer’s discount group assignment from an existing group to a new group.

Change Price Table – Allows a user to change a customer price table from the store default.

Change Promotion Group – Allows the user to change a customer’s promotion group. This affects only customers to whom a promotion group is assigned.

Disable Save Existing Customers – Disables the ability for an employee to save any changes to an existing customer. The employee can create a new customer but will not be able to save any changes to an existing customer.

Issue/Revoke Frequent Buyer Points – Allows a user to modify customer’s frequent buyers points, either buy issue or revoking by reason. This is used from F3-Menu.

Merge Customers – Allows a user to merge customers using the F3-Menu Merge customer utility.

Restrict Search Other Locations – In a multi-store environment (e.g., hosted operation), setting this option will allow a user to only search for customers assigned to the store to which they are logged in.

Run A/R Statements – Allows a user to run Accounts Receivable billing statements from the A/R process tab.

Run Hotel Statements – Allows a user to run Hotel billing statements from the Delivery / Hotel process tab.

See Credit Card Numbers – Allows a user to view a customer’s complete Credit Card on File (CCOF), located on the A/R-CC tab on the Customer View screen. If this right is not granted, the user will only see the last 4 digits of the credit card number. This is an important security right to prevent possible credit card fraud.

See Total Invoice Dollars – Allows a user to see invoice amounts contained on search screens. An example is on a customer search you display all orders for the customer with total pieces, orders and
dollars. If this is not enabled for an employee they will not see the total dollars for the search. This applies to any search or advanced report run from the search tab.

Send Batch Emails – Allows users to use batch Email utility located on the F3-Menu batch Email utility.

Send Individual Emails – Allows user to send and Email from the customer detail screen.

Set Up A/R Accounts – Allows a user to identify a customer as an A/R customer.

Update Customer Rating – Allows a user to update customer ratings using the rating utility. This function is located on the F3 “Menu”. This is an advanced right that should normally be disallowed.

View Callbacks – Allows user to view callbacks located on the customer CRM tab or from the home page “My Tasks”.

View CRM Tab – Allows the user to view the CRM (Customer Relations Management) tab located on the Customer View screen. This right is required in order to use the “Add CRM Contact” right.

View Customer Ratings – Allows a user to view the customer ratings utility. This function is located on the F3 “Menu”. This is an advanced right that should normally be disallowed.

View Marketing Popup – Allows a user to view the Marketing Popup enabled on a given workstation. If the user/group does not have this right they will not be presented with the Marketing Popup window as configured at the given workstation.

Invoice

Allow Adjustments – Allows a user to apply a pre-defined invoice adjustment.

Allow Manual Adjustments – Allows a user to apply a manual adjustment to an invoice (located on the Order View-Adjustments tab).

Allow Manual Coupon – Allows a user to apply a manual coupon (located on the Order View-Coupons tab).

Allow Merchandise Setup – Allows a user to set up merchandise items in program configuration.

Change Item Price – Allows the user to modify an item price from the item view screen.

Modify Existing HSL – Allows a user to modify a defined heat seal label.

Redo Item – Allows the user to perform a “Redo” function, located on the Order View screen. Note: this right does not apply to item or order adjustments named ‘Redo’.

Reprint Invoice – Allows the user to reprint an invoice. This function is available from either the Order View screen or the Recent Transactions tab of the SPOT Home Page.

See Rack Locations – Allows the user to view rack locations on any screen or report other than the Order Pickup screen. This can aid in theft-prevention by not allowing the employee to find customer’s order locations other than from the Order Pickup Screen. If this right is not granted, all rack locations will appear to the user as ‘***’.

Split Invoice – Allows use of the “Split Invoice” button on the Order View screen. This right does not apply to the “Split” button on the markin screen. To limit splitting at Detail use the “Allow Manual Split at Markin” right.

Void Invoice/Item – Allow the use of the “Void Invoice” button on the Invoice Detail screen and the “Void Item” on the Item Detail screen.
Write Off Invoice – Allow the use of the “Write Off” button on the Invoice Detail screen.

**Issue Manger**

Close Issue Action – Allow the user to update and close an issue action.

Close Issue – Allow a user to close and open issue

Open Issue Actions – Allow a user to create a new action configured In an issue

Open Issues – Create a new issue using at the customer level or from the F3-Menu

View Issue Manager – Allow user to open the issue manager tab at the customer level or from the F3-Menu

**Lot Management**

Assemble Lots – Allows the user to set a lot to an “assembled” status.

Close Lots – Allows the user to set a lot to a “closed” status.

Create Lots – Allows the user to create new lots.

Search Lots – Allows the user to search for lots found in history. These lots would include closed and assembled lots.

View Lot Manager – Allows the user to view the Lot Manager (accessed from the F3 “Menu” screen).

**Production**

Access Report Gallery – Allow user access to the “Reports Gallery” button under reports.

Allow Manual Split at Markin – Allows use of the “Split” button on the Detail Markin screen.

Allow Merchandise returns – Allows a user to return merchandise sold via merchandise sales.

Allow Quick / Detail Mismatch – Allows a user to dismiss the warning generated at detail when the total number of items detailed does not match the number Quicked.

Allow Searching – Allows access to the Search Results screen, accessible via the F2-Search toolbar button and from the Alerts, Recent Transactions, and Process View tabs on the SPOT Home Page.

Disable Detailed Receive – Disable use of the Detail function located on the SPOT Home Page.

Disable Merchandise Sales – Disable use of the Merchandise function located on the SPOT Home Page.

Disable Pickup – Disable use of the Pickup function located on the SPOT Home Page.

Disable Price Quote – Disable use of Price Quote function located on the SPOT Home Page.

Disable Quick Receive – Disable use of the Quick function located on the SPOT Home Page.

Disable Rack/Scan – Disable use of the Rack function located on the SPOT Home Page.

Disable Reports – Disable access to the Reports tab located on the SPOT Home Page.

Disable Route Setup – Disallow a user from modifying route stops, including assigning a customer to a new stop.
Modify Existing Promised Date – Allows the user to modify an invoice’s promised date. This applies to all functions including Quick, Detail, Order View, Item View and batch processing.

Perform Route Sweep – Allows a user to perform a Route Sweep from the Delivery processing tab.

Restrict Reports for Other Locations – In a multi-store environment (e.g., hosted operation) setting, this right will allow an employee to run reports only for the store to which they are logged in.

Un-Rack Orders – Allows the user to “Un-Rack” ready orders. Any Un-Racked order will revert to detailed status and is no longer marked as ready.

Use SPOTLink – Allows the user to connect to SPOT services via a SPOTlink-enabled external device such as a SPOTScanPC or SPOTphone.

View Graphs – Allows the user to view the Graph tab on the Home Page.

View Summary – Allows the user to view the Summary tab on the Home Page.

Time Clock

Allow Time Clock Access – Allows a user to clock in or clock out (accessible from the F10-Time Clock toolbar button).

Modify Time Clock Entries – Allows a user to modify Time Clock Entries (accessible from the F3 “Menu” Modify Time Clock screen). This right is normally granted only to managers or owners.

View time clock entries for all stores – Allows a user to see all users from all stores when running in a centralized system.

Utilities

Allow Purging Data – Allows use of the Purge data functions in SPOT. This function is located on the F3 “Menu”. This is an advanced right that should normally be disallowed.

Perform Import/Export Functions – Allows use of the Import/Export functions of SPOT. This function is located on the F3 “Menu”. This is an advanced right that should normally be disallowed.

Run System Maintenance – Allows use of the System Maintenance function within SPOT. This function is located on the F3 “Menu”. This function should be run only under the direction of SBS Technical Support.

Price Change Utility – Allow use of the utility located on the F3-Menu.

System Rights

As noted in previous chapters SPOT users are associated to Groups to control user Security and user access. Once you have a Group defined you must associate System Rights to a group. Modifying System Rights is done in Setup / Users, Groups, Rights and then by selecting the System Rights tab. You will see the Groups screen displayed as noted below:
The process of assigning System Rights is very simple. You select the group from the left column (Authorized Users/Groups) and then select what rights (System Rights) this group will be associated with. To associate a system right you will simply select the box to the left of the right description and a check mark will appear. Once the checkmark is associated you will have this right associated with a group. There is no saving of the setting changes required. Once the check mark is in place it is saved. If you later decide to remove a right, just select the box on the right and remove the check mark.

The most difficult part of implementing security is understanding System Rights. Listed below are current System Rights available with descriptions.

**Allow Activity Selection** – Allows the selection and use of other installed activities besides SPOT. This is accessible via the File->Select Activity menu option.

**Allow Activity Setup** – Allows the use of the Metaspace browser under Setup / Program Configuration.

**Allow Application Editing** – Ability to create and modify the Tools / Application list.

**Allow Exit** – Allows the user to exit SPOT.

**Allow Logoff** – Allows the user to log off from SPOT and log in again as a different user.

**Allow Metasetting Changes** – This works with the Allow Activity Setup. You may have the right to get into setup but not the right to save changes. This allows a user to Save and update Meta settings.

**Invoke SPOT Query** – Allow the user to use SPOT Query to modify existing or create new reports. The SPOT Query tools are located under Setup / SPOT Query.

**Manage Locations and Security** – This will allow access to Location and User, Groups and Rights under Setup.

**Manage Users** – Allows the management of users in the system. This is a limited version of the Manage Users, Groups, Rights system right. It will only allow access to the User tab on Users, Groups and Rights.
Manage Users In Other Stores – Allows users with this enabled to look at users from others stores. This includes user, manager and time clock management.

See User PIN – Option to view a users PIN number in the User manager.

View Activity Log (All Stores) – Allow the use of the Activity Log All Stores.

View Activity Log (Current Store) – Allow the use of the Activity Log for the current Store.

View Service Log – Allow the use of the Service Log.

**Default Security Rights by Group**

This table reflects a typical configuration of security rights for a basic installation. You may customize systems security rights as needed for your operations requirements.

<table>
<thead>
<tr>
<th>Batch Operations</th>
<th>Time Clock</th>
<th>Assembly</th>
<th>Production</th>
<th>QC</th>
<th>Markin</th>
<th>Route</th>
<th>Counter</th>
<th>Accounting</th>
<th>Manager</th>
<th>Owner</th>
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<tbody>
<tr>
<td>Change Promised Date (Batch)</td>
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<td>Rack/Processing Step</td>
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<tr>
<td>Void Invoice (Batch)</td>
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<tr>
<th>Cashier Function</th>
<th>Time Clock</th>
<th>Assembly</th>
<th>Production</th>
<th>QC</th>
<th>Markin</th>
<th>Route</th>
<th>Counter</th>
<th>Accounting</th>
<th>Manager</th>
<th>Owner</th>
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<tr>
<td>Allow Pay Later at Pickup (PNP)</td>
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<td>Allow Reverse Pickup</td>
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<td>Cancel Cashier Sessions</td>
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<td>Cancel Drawer Check in/Checkout</td>
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<td>Check Out/In Cash Drawers</td>
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<td>Discount Pickup Session</td>
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<td>Issue/Revoke Cash Credit</td>
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<tr>
<td>Modify Reconciliation Reports</td>
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<td>Perform A/R Adjustment</td>
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<td>Perform Credit Card Adjustment</td>
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<td>Perform Payin</td>
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<td>Perform Payout</td>
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<td>Print X-Report</td>
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<td>Remove Selected Items Pickup</td>
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<td>Use Gift Card Manager</td>
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<td>Use Payment/CC Exception Screen</td>
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<tr>
<td>Use Restricted A/r Adjustment</td>
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<td>Use Restricted Cash Credit Reasons</td>
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<td>Use Restricted CC Adjustment</td>
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<tr>
<td>Use Restricted Payin/Payout Reasons</td>
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<tr>
<td>View Cash Reconciliation</td>
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<table>
<thead>
<tr>
<th>Customer Functions</th>
<th>Time Clock</th>
<th>Assembly</th>
<th>Production</th>
<th>QC</th>
<th>Markin</th>
<th>Route</th>
<th>Counter</th>
<th>Accounting</th>
<th>Manager</th>
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<tr>
<td>Add CRM contact</td>
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<tr>
<td>Allow Reassigning Invoices</td>
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<td>Allow Reassigning Sold Invoices</td>
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<td>Change Customer ID</td>
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<tr>
<td>Change Discount Group</td>
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<tr>
<td>Change Price Table</td>
<td>Change Promotion Group</td>
<td>Disable Save Existing Customers</td>
<td>Issue/Revoke Frequent Customer Points</td>
<td>Restrict Search Other Locations</td>
<td>Run A/R Statements</td>
<td>Run Hotel Statements</td>
<td>See Credit Card Numbers</td>
<td>See Total Invoice Dollars</td>
<td>Send Batch Email</td>
<td>Send Single Email</td>
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### Invoice Functions

<table>
<thead>
<tr>
<th>Allow Adjustments</th>
<th>Allow Manual Adjustments</th>
<th>Allow Manual Coupon</th>
<th>Modify Existing HSL</th>
<th>Redetail Invoice</th>
<th>Redo Items</th>
<th>Reprint Invoice</th>
<th>Split Invoice</th>
<th>Void Items/Invoice</th>
<th>Write Off Invoice</th>
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<tbody>
<tr>
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<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

### Production Functions

| Access Reports Gallery | Allow Manual Split at Markin | Allow Merchandise Returns | Allow Quick/Detail Mismatch | Allow Searching | Disable Detail Receive | Disable merchandise Sales | Disable Pickup | Disable Price Quote | Disable Quick Receive | Disable Rack/Scan | Disable Reports | Disable Route Setup | Modify Existing Promise Dates | Perform Route Sweep | Restrict Reports for Other Locations | Un-Rack Orders | Use SPOTLink | View Graphs | View Summary |
|------------------------|-----------------------------|--------------------------|-----------------------------|-----------------|------------------------|---------------------------|----------------|---------------------|----------------------|-----------------|-----------------|----------------------|--------------------------|-----------------------------|-----------------|----------------|----------------|----------------|
|                        |                             |                          |                             |                 |                        |                           |                |                     |                      |                 |                 |                       |                          |                         |                 |                |               |               |
## Things you should know about Security

This is a quick list of items you should be looking at when dealing with security and your employees. Each of these items is important in maintaining cash controls and system security.

1. Change User PIN number’s on a regular basis.
2. Use a separate PIN for basic SPOT usage and another PIN for Management/Configuration options.
3. Only the computer should open cash drawers.
4. Balance drawers at day end.
   a. Double check cc entries against the cc machine’s information.
   b. Know why balances may be out.
5. Perform an inventory at least monthly.
6. Monitor these reports.
   a. Adjustments
   b. Coupons
   c. Voids
   d. Payins/Payouts
   e. Cash Credits given
   f. CC adjustment
   g. Look at activity logs canceled pickups
7. Monitor all claims.
8. Consider purchasing a display pole.
10. Use two Operator/PIN entries for managers and owners.
    a. First entry has short PIN and normal “Counter” group setting.
    b. Second entry has longer PIN and “Management” or “Owner” group setting.
11. Never enter a management PIN on the touch screen – always use the numeric keypad on the keyboard.
12. Print tags, and instruct production to report/reject items with no tags.
13. Disable the viewing of inventory locations and total dollars in search.
14. Monitor the use of manual adjustments. These should only be used by managers and owners. Clerks can use these to make modifications to invoice amounts and pocket the difference in price and cash collected.
15. Use of re-assigning invoices to customers should be followed closely. Many clerks have found that they can re-assign an invoice to them self’s or other customers and then pocket the money collected from the customer.
Allow / Require Users to Change PIN Number

You may have a clerk that is using some one's PIN. Users have the option to change their own PIN at any time. The user will Navigate to the Home Page > F3-Menu > General (3 of 4) and select the "Change User Pin Option." This will prompt you for your current PIN and then prompt for your new PIN with a confirmation. It is a good habit to have users change PIN numbers on a regular basis.

A best practice and requirement for PCI compliance requires user PIN's to be changed every 30 days. You can require a PIN to be changed by enabling the Company Setting > Security > Require Change of PIN.
Activity Log

Overview

The Activity log is a very powerful tool based on transactions and usage of SPOT. The Activity Log tracks almost every move that the clerk makes during the course of the day.

An example of the use of the activity log would be to look at all clerks that had anything to do with invoice 10-001234. This will include who Quicked, detailed, racked and then sold the order along with any process that happened in between these steps.

Another very powerful use of the activity log is to review clerks who are exiting out of order pickup. This is a sure sign of clerks stealing from you. They enter order pickup and print a pick list, gather orders and collect the correct amount for the order. They then cancel out of the pickup. If after running an inventory you find orders missing, the activity log is the first place you go. Do search on this order and see what has happened. Often the activity log will show if there was an order pickup canceled for the order. With the activity log you now see the who, where and when of the order with time and clerk details.

How to Use the Activity Log

You gain access to the Activity log use Tools / Activity Log. You will be presented with the following screen.

To understand what the activity log can do you first must understand the tool. Here is a description of each component of the screen.

View Definitions – This is the starting point of the activity log utility. This tab will give you selection criteria options to create a new search or view. On this tab you have the following:

Views – A view is a saved activity log search. You may choose to create a search and then save or “Add to Views list” for use at a later time.

Organize Views List – This is used in conjunction with the “Views” options. This will allow you to create a logical layout of saved views.

Quick Date - This is a quick way of selecting date ranges for the search. By default you start at Today and have options to select automatic date ranges for Yesterday, This Week, This Month, This Year or Custom Date. Customer Date will allow you to use the From and To date fields to select what date range you would like to search.
Event Type - These are the Activities that we track in SPOT. Placing a check mark next to any of these will include the selected items in the search. You notice by default all activities are selected. You can remove the check marks one by one or use the (All) item to remove or apply all activities to the search. There is a detailed list of these activities following the field descriptions under “Available Activity Log Entries”.

User – These are the users that will be included in your search. You may choose to select all or just select individual clerks to report on.

Workstation – These are the workstations that will be included in your search. You may choose to select all or just select individual workstations to report on.

Invoice Number – Enter the invoice number in question and the search will be limited to this invoice. You must enter the entire invoice number. An example of a properly entered invoice number is 11-000234.

Customer Name – Enter the customer’s name and limit the search of transactions with customer name. You can search for Janis Jones, Jones or Janis and you will find all or part of the name. By being more specific with a name you will limit how many records are returned in the search.

Comments – A comment is written to the activity log with every transaction posted to the activity log. These are descriptions and comments of the transaction. As you can see from the sample below each activity log event has a different type of comment created. As you become aware of the Comments added by activities you can use these to search with even more detail.

<table>
<thead>
<tr>
<th>Date/Time</th>
<th>Event Type</th>
<th>Comments</th>
<th>Invoice</th>
<th>Customer</th>
<th>User</th>
<th>Workstation</th>
</tr>
</thead>
<tbody>
<tr>
<td>11/13/03 9:27:56AM</td>
<td>Setup Saved</td>
<td>Workstation Settings</td>
<td></td>
<td></td>
<td>GLK</td>
<td>W25COUNTER2</td>
</tr>
<tr>
<td>11/13/03 9:35:41AM</td>
<td>Setup Saved</td>
<td>Workstation Settings</td>
<td></td>
<td></td>
<td>GLK</td>
<td>W25COUNTER2</td>
</tr>
<tr>
<td>11/13/03 12:33:45PM</td>
<td>User Record Saved</td>
<td>User: Ted Jones</td>
<td></td>
<td></td>
<td>GLK</td>
<td>MARK-LAPTOP</td>
</tr>
<tr>
<td>11/13/03 9:42:08AM</td>
<td>User Record Saved</td>
<td>User: Ted Jones</td>
<td></td>
<td></td>
<td>GLK</td>
<td>MARK-LAPTOP</td>
</tr>
<tr>
<td>11/13/03 9:39:58AM</td>
<td>User Record Saved</td>
<td>User: System Admin</td>
<td></td>
<td></td>
<td>GLK</td>
<td>MARK-LAPTOP</td>
</tr>
<tr>
<td>11/13/03 9:25:37AM</td>
<td>User Record Saved</td>
<td>User: CLERK CLERK2</td>
<td></td>
<td></td>
<td>GLK</td>
<td>W25COUNTER2</td>
</tr>
<tr>
<td>11/13/03 9:25:14AM</td>
<td>User Record Saved</td>
<td>User: CLERK CLERK2</td>
<td></td>
<td></td>
<td>GLK</td>
<td>W25COUNTER2</td>
</tr>
<tr>
<td>11/13/03 9:25:06AM</td>
<td>Setup Saved</td>
<td>User Settings</td>
<td></td>
<td></td>
<td>GLK</td>
<td>W25COUNTER2</td>
</tr>
<tr>
<td>11/13/03 9:25:46AM</td>
<td>Logged Off</td>
<td>SPOT2000</td>
<td></td>
<td></td>
<td>GLK</td>
<td>W25COUNTER2</td>
</tr>
<tr>
<td>11/13/03 9:35:46AM</td>
<td>Logged Off</td>
<td>SPOT2000</td>
<td></td>
<td></td>
<td>GLK</td>
<td>W25COUNTER2</td>
</tr>
<tr>
<td>11/13/03 9:25:06AM</td>
<td>Setup Saved</td>
<td>Site Settings</td>
<td></td>
<td></td>
<td>GLK</td>
<td>W25COUNTER2</td>
</tr>
<tr>
<td>11/13/03 4:18:39PM</td>
<td>Pickup Finished</td>
<td>Pick-Up $45.00 by Cash</td>
<td>11-000014</td>
<td>Jones, Juns</td>
<td>GLK</td>
<td>MARK-LAPTOP</td>
</tr>
<tr>
<td>11/13/03 4:19:39PM</td>
<td>Cash Drawer Opened</td>
<td>Order Key</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/13/03 4:18:39PM</td>
<td>Search Performed</td>
<td>Order</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/13/03 4:19:39PM</td>
<td>Search Performed</td>
<td>Order</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/13/03 9:31:39AM</td>
<td>Donation &amp; Price Used</td>
<td>Upsells</td>
<td>(View Invoice)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11/13/03 4:10:39PM</td>
<td>Receipt Finished</td>
<td>Location: 1002</td>
<td>11-000014</td>
<td>Jones, Juns</td>
<td>GLK</td>
<td>MARK-LAPTOP</td>
</tr>
<tr>
<td>11/13/03 10:31:39AM</td>
<td>Quick Finished</td>
<td>Laundry - 2</td>
<td>11-000014</td>
<td>Customer, Joe</td>
<td>GLK</td>
<td>MARK-LAPTOP</td>
</tr>
</tbody>
</table>

Update View – This is the button you will use to generate the report. Once your selection criteria in entered on the “View Definitions” tab and you press the update view it will take you to the “View Results” tab.

Add to Views List – If you have a search definition you would like to save in the “Views” tab for later use select this button.

Close – This will exit you out of the Activity Log screen and return you to the Home Page.

View Results Tab – This is the tab that will display the activity log report. You can use this tab or the “Update View” button to view your results. Once you are on this tab you have the option to either go back to the “View Definition” tab or print the current report. The current report can be sorted by any of the column headers. By default it sorts by Date/Time but you may want to sort by Event Type. To sort by this column click on the column header “Event Type” and the report is sorted.

Once you understand these fields you can generate an activity log search.

**Step 1** - Keep all fields on the View Definitions screen as defaults as noted in the following view.
Step 2 - Now select the “Update View” button or the “View Results” tab at the top of the screen to review your results as shown below.

Step 3 - You now have the option from the results screen to return to the “View Definitions” screen by selecting the “View Definitions” tab and modifying your search criteria. You can choose “Print Results” of the search to your report printer or “Close” and exit the activity log and return to the Home Page.

**Available Activity Log Entry Items**

All activity log entries have the date / time of the activity log, the clerk that used the activity, the workstation on which the activity occurred, on along with comments when applicable and the dollar amounts pertaining to the event logged.

- **Activity Log Entered** – Shows who entered Activity log.
- **Activity Log Exited** – Shows who exited the Activity log.
- **Assembly Canceled** – Assisted invoice Assembly sessions that have been canceled.
Assembly Finished – Assisted invoice Assembly sessions that have been completed and how many orders had been completed.

Assembly Started – Assisted invoice Assembly sessions that have been started.

Batch Void – Use of the Search / Batch Void feature along with number of orders affected.

Batch Promised Date – Use of the Search / Batch Promised Date feature along with number of orders affected.

Cash Credit Issued – Issued Cash Credits to a customer including customer name, description and amount of the credit.

Cash Drawer Opened – Shows when a cash drawer has been opened and the reason for the opening. Drawer Check-in, Order Pickup, Change, etc.

Cashier Session Canceled – A cashier session is only used in the “Central Cashier” mode of pickup. Any customer removed from the “Central Cashier” session queue will be displayed with customer and clerk information.

Checkin Finished – Drawer Checkin process that has been completed.

Checkout Canceled – Drawer Checkout process that has been canceled.

Checkout Finished – Drawer Checkout function that has been completed.

Checkout Started – Drawer Checkout process that has been started.

Checkout X-Report Printed – Drawer checkout process that has used the X-Report option.

Credit Card Adjustment – Credit card adjustment process via the F3 “Menu” option with the amount and reason of the adjustment.

Credit Card on File – Shows when a credit card on file has been added to a customer record.

Customer Record Saved – Any changes made to a customer profiles and it is saved.

Describe & Price Used – Use of the “Describe & Price” option when detailing an invoice.

Detail Canceled – Cancellation of an invoice being detailed.

Detail Finished – Completion of an invoice being detailed.

Detail Started – Starting of an invoice being detailed.

Direct Receive Exited – Exiting of the direct receive process.

Direct Receive Saved – Completion of any invoice being entered via the direct receive process.

Direct Receive Entered – Starting of a direct receive session.

Invoice Adjustments Changed – Use of the manual adjustments option on the Adjustments / Invoice detail screen.

Invoice Coupons Changed – Use of the manual coupon option on the Adjustments / Invoice detail screen.

Invoice Picked Up – Not Paid (PNP) – Order pickup option (PNP) being used.

Invoice Price Changed – Any modification to an invoice amount. This will include adjustments, coupons, discounts made to an existing invoice.
Invoice Reassigned – Use of the “Re-Assign” invoice process via the Invoice detail screen.

Invoice Reprinted – Use of the “Reprint” Invoice process via the invoice detail, recent transaction and other screens which support the reprint process.

Invoice Split – Use of the “Split” invoice process via the invoice detail screen.

Invoice Voided – Use of the “Void” invoice process via the invoice detail screen.

Item Detail Entered – Use of the item detail button via the VI during invoice detail.

Item Redone – Use of the “Redo” invoice process via the invoice detail screen.

Logged Off – User logged off of SPOT. This is only a logoff of SPOT and not logged off from the network.

Logged On – User logs on to SPOT.

Lot Manager Entered – User enters the Lot Manager screen.

Lot Created – User Creates a lot in Lot Manager.

Lot Closed – User sets a current open lot to a closed a lot in Lot Manager.

Lot Assembled – User sets an open or closed lot to Assembled in Lot Manager.

Lot Search Invoked – User searches for lots via the Search button in Lot Manager.

Order Detail Entered – Use of the Order detail screen from any “order detail” button such as the VI or recent transaction screen.

Payin Performed – Use of the F3 “Menu” Payin process along with the reason and amount of Payin.

Payout Performed – Use of the F3 “Menu” Payout process along with the reason and amount of the payout.

Pick list Printed – Use of the “Pick List” button or the automatic pick list printing process during the Pickup process.

Pickup Canceled – Any time the “Cancel” button is used on the Order Pickup screen.

Pickup Started – Any time a “Pickup” is started.

Pickup Selected Invoice Removed – Any order that is marked as “Ready” on the pickup screen that is deselected for pickup. For example, order 11-00100 is set for “Pickup” on the pickup screen and the clerk used the “Clear” button to remove the Pickup status.

Process Step – Wrong Status – Use of the Process Step process and the Invoice is in the wrong status expected for this process step.

Process Step – Wrong Store – Use of the Process Step process and the invoice is being scanned in the wrong store than expected for this process step.


Process Step Finished – An order was successfully entered into a process step.

Quick Canceled – Quick Receive started and then canceled.

Quick Finished – Quick Receive Complete from the Home Page.

Quick Started – Quick Receive started from the Home Page.

Rack – No Location – Invoice racked via the Manual location mode with no location.

Rack – Wrong Status – Invoice was scanned for racking and had an invalid status for racking. This is generally caused when forced process steps are used and the process step is missed. An example of this is Quick, Detail, QC or Bagging and then Rack. If the QC or Bagging step is missed you will get an incorrect status on an order as it is racked. This will also update your “Racking Exceptions” alert on the Home Page.

Rack – Wrong Store – If you attempt to scan an invoice at racking that is destined for a different store than the one you are logged in to. This will also update your “Racking Exceptions” alert on the Home Page.

Rack Canceled – Exiting of the “Rack” process without assigning a location to an Invoice.

Rack Finished – Completion and exiting of Rack process.

Rack Started – Entering the Rack process from the Home Page.

Rack Undone – Use of the “Un-Rack” button on the racking screen.

Reverse Payments – Use of the F3 "Reverse Pickup" process.

Route Order Sold – Use and completion of the “Post Orders” process for a route.

Search Performed – Entering of any search in SPOT. This would include the use of the Search button located on the Home Page or any alert on the Home Page.

Setup Canceled – Cancellation of the Setup / Program configuration process.

Setup Entered – Entering the Setup / Program configuration process.

Setup Saved – Completion and Saving a session in the Setup / Program Configuration process.

System Maintenance Entered – Use of the F3 "Menu" System Maintenance process.

Time Clock Management Entered – Use of the F3 "Menu" Time Clock Management process.

Time Clock Value Changed – If a manager changes any part of a user’s time clock records in time clock management.

User Manager Entered – Entering the Setup / Users, Groups, Rights process.

User Manager Exited – Exiting the Setup / Users, Group, Rights process.

User Record Saved – Any users saved in the Setup / Users, Group, Rights process. The name of user is noted in the entry.
Company Based Messaging

Overview
From the Home Page “Messages” allows you to send Emails to all users of SPOT. A user of SPOT may be a CSR, Manager, Production staff or staff that just uses the Time Clock functionality to punch in and out. Message may be sent to a single user, multiple users or to groups within your company. Messages may have specific requirements or options including required reply, notification of the read message, references to specific customer or invoice.

Limitations of who will be eligible for messaging in your organization will be dictated by your configuration of SPOT. If you are running standalone/LAN you are able to send messages to any user or group within the store or standalone/LAN installation. If you have a retails store, routes and restoration on the same standalone/LAN installation you are able to send messages to all users on the system. If you are running in a centralized or hosted environment you have access to all users and groups in all stores in your system.

Users are notified at the time they login with their PIN if they have messages via the “Messages” button being displayed in Red.

How to use
Retrieve a Message
1 - The screen below shows that the user admin is logged into the system and has two unread messages just by looking at the Messages button in red and the notation of (2). Select the “Messages” button to continue to reading/receiving your messages.

2 - Notice in the screen below you have six messages and two of them are in bold. These are your unread messages. To read a message double click the message or single click and use the “Open” button below.
After the message is open you will see the details of the message. Notice on the example below we have invoice 08-0000001 and the customer Ted Jones attached to this message. At the time the message is sent you are able to attaché these items. To see the attachments just single click on either the invoice or the customer name field.

After you have read the message you have the option to either “Reply” or “Close” the message.

4- After the message has been read your In-Box will no show only a single message indicating it has not been read.

**Sending a Message**

1- Select the “Message” button from the Home Page. This will take you to your In-Box.
2 – Select the “Open” button located at the bottom left of the In-Box.

3 – As shown you will see your name in the Sender field.

4 - Select the “To” button to select the group or users you would like to send this message and then "Select".
5 - Enter the Subject of the Email or select the “Subject” button for predefined subject lines and “OK”

6 – At this time you may choose to attach a “Link” to a specific invoice or “Link to a Customer” by selecting either or both of these buttons.
7 – “Priority” Options

**Low** –

**Normal** – The default for any new message

**High** –

8 – “Notification” Options

**Notify at Clockin** – The user will be notified of this message at the time the user access either the clockin or clock out function.

**Notify on PIN Entry** – The user will be notified the next time the users PIN is entered using the system.

10 – “Response” Options

**No Response** – No response is required from the user and the default for any new message.

**Acknowledge Receipt** – You the sender will receive an "Acknowledgement" receipt in your inbox at the time the recipient opens the message

**Reply Required** – Message will be flagged with a “Reply Required” attribute in the inbox at the time the message is received by the recipient. The flag will display in the inbox until the message is replied to. You will also have tracking to this in your inbox so that you may keep track of these required replies.

11 – Press the “Send” button to deliver this message

**Configuration Options**

Predefined message type

You may choose to create user defined / preset message subjects defined at the Store level. Navigate to Program Configuration > Messaging Settings > Preset Message Subjects. As shown below you may create your own predefined subject lines.
Callbacks

Overview
Callback tracking is designed to assist in the contact management of a customer. Good examples for the use of callbacks are Claims Follow up, New Customers Follow Up, Late Order Reminders etc. An owner, manager, clerk may create a callback for a specific customer for a date. These “Due” callbacks will be displayed on the callbacks screen and accessed via the “Callbacks” button on the Home Page. The button on the Home Page will even tell you how many callbacks are due.

How to use
As shown below the Home Page has a “Callbacks” button at the bottom right of the screen. The example below shows that the system currently has three callbacks due or overdue. You can see this by viewing the “Callbacks” button located in the lower right corner of the Home Page.

By selecting the “Callbacks” button from the Home Page you will be prompted for a PIN number and then the “Callbacks” screen as shown below.
Notice the three entries on the example screen above. The entries in this screen are sorted by scheduled Callback date in ascending order. Notice you have the following buttons available on this screen.

**Mark As Complete** – Marks the selected Callback as completed and prompts for comments / reasons you are closing the reminder. These comments are automatically added to an entry in customers CRM Tab

**Customer View** – Displays the selected customers CRM screen.

**Close** – Closes the current window and returns you to the Home Page

**Close existing Callback**
Select an existing Callback and select the “Mark as Complete” button. This will prompt you for comments as to why you are closing the entry. This comment along with the original reason for the call back will be added to the customers CRM tab.

**Creating New Callback reminder**
Callbacks are created at the customer level using the CRM Tab. The example below shows a “Claim Follow Up” scheduled for 7-21-2004. This callback will be displayed on the callbacks list on the day of or any date later than the date specified or until is manually closed.
To create a Callback you will simply select a call back type from the configured list and then specify a date for the call back by placing a checkmark next to the selected date.

**Configuration**

Callback types are defined in configuration and are used by all Stores, Workstations and Clerks. Navigate to Program Configuration > Company Settings > Customer Setting > CRM Settings > Contact Types and create as many callback types as needed.

**Security**

Users have access to Callbacks with two separate Activity Rights, one to view and one to close callbacks.

- **Close Callbacks** – Ability to “Close” a call back from the Callback screen
- **View Callbacks** - Ability to access and view the Callback screen
Write-Off Orders

Overview
Write-off allows you to remove or write-off inventory and "not" affect sales figures. Write-offs reasons may be defined by you for later reporting. You can report on these orders by date range for future adjustments to your external accounting system. You have access to use write-offs at either the order view screen or on the payment exceptions screen. This is a process that has a security setting to allow the process.

Order View Screen
Search for any invoice you may want to write off. From the Order View screen select the Write-off button and select a reason for the write-off.

Payment Exceptions Screen
You may use the write-off process from the payment exceptions screen. You will select an order that will not be collected by cash, check or any other tender type with the write-off button on the screens as shown below.
Reports
You can report on all orders that have been written off with the “Write-offs by Date” report located in the Reports Gallery > Inventory folder.

Configuration
Write off reasons are definable at Company Settings > Invoice Settings > Write-off Reasons

Security / Activity right of Invoice > Write-off Invoice – Security setting to allow a user to write off an invoice.
SPOT Query

Overview
There are over 140 reports in SPOT and many of them have been created using SPOT Query. This utility is very complex and will currently allow you to create and modify two type of reports contained in SPOT. There is a third type of a report that is contained in SPOT that is not modifiable by you. The report type is "Custom Handler". Custom Handler reports tend to be more complex with user interfaces and have multiple data sources.

Who uses SPOT Query
SPOT Query is powerful and is not suited or intended for all users. This tool can be used by anyone with a deep understanding of SPOT, security access to SPOT Query and the ability to completely understand the concepts and features explained in this document. The tool is not intended for the average user or manager but for advanced users of SPOT and other PC based software and Utilities.

Components

Record Set / Data Source
SPOT Query has 3 types of record sets / data sources, “SPOT Query Builder” and “SQL Statement” data sources / record sets are modifiable by you and the third type “Customer Handler” is not. The difference in these records sets / data sources is the way the data or the “Record Set” is generated. Generation and modification of records sets in “SPOT Query Builder” are done with a point and click GUI interface, while the SQL Statement type uses SQL statements and has no GUI user interface. This type requires the complete understanding of the SQL data base language to generate record sets. “Customer Handler” record sets consist of data collected, sorted and grouped by internal programming and they do not rely on SPOT Query. For these reports the record sets are not modifiable by you.

A “Record Set” is just that, a set of records that you want to report on. SPOT Query gathers these records and then presents them in report format. A report could be a simple list of customers, orders, items etc. A basic example would be a customer report showing just the customer name, address and phone number for each customer in your database. In this report each customer has a line or record and they all are included in the reports “record set”. The mentioned report may be simple but it will include these fields.

Customer Name
Address
Phone
Last visit date

A more complex record set may contain 25 or more fields from different data sources. Now expand the previous example and include only route customers that have not used your services in the last 45-330 days and have total sales of greater than $100. Notice the example screen below shows the following fields and filters.

Customer Name
Customer Number
Last Visit Date
Total Sales
Route name

Last visit date<45 days ago
Last visit date>330 days ago
Total Sales>$100
Route Name is not blank
As you can see in the example above, fields have been included on the “Query Fields” section of the screen. In the Query filters you will see the rules used to gather the data and then sort the data. We will discuss these items in more details later in this document.

**Presentation**

The “Presentation” of a record set is the actual layout and human interface portion of the report. The presentation of a report may be to crystal reports for review on screen or printing, a Word Merge document, a mail merge file or an Excel file export or a comma delimited file that we call a mail merge.

**Available Fields**

Currently there are approximately 300 data fields used in SPOT and of these approximately 150 are available in SPOT Query via the GUI interface. “All” fields are available via the “SQL Statement” type data source / record set. SBS is continually adding new data fields to the SPOT Query GUI interface. If you find data that is not available to you that may be required for reporting please let us know. We will do our best to expose these data fields for you in a future release. The current categories or “Domains” as they are referred to are as follows:

- Coupon
- Customer
- Customer Cash Credit
- Customer Preferences
- Item
- Item Adjustment
- Item Alteration
- Item Comment
- Item Modifier
- Order
- Order Adjustment
- Order Comment
- Order Status
- Payment
- Payment Order
- Tag
- User
- Workflow
- Workstation

Each Domain has its own fields available. You will review some of these domains in an exercise later in this document.
Using SPOT Query

SPOT Query Settings

You access the SPOT Query utility via the Home Page / Setup / SPOT Query. A user will be required to have the “System” right “Invoke SPOT Query” in order to access and modify reports with this utility. The screen below is the starting point for adding a new or modifying an existing report. Understanding the layout, content and functionality of this and other windows will be important in using this utility.

SPOT Query Items - This is the collection or list of report categories available. By using the “+” next to each of the categories you will expose the “Record Set/Report” available in that folder as displayed with “Retention Marketing” above.

Presentation Profiles – This is an advanced option in SPOT Query and is used only by development or advanced users and will not be discussed in this document.

Add – Allows you to add a report to the current items list at the location you have selected. If you have “Retention Marketing” selected and you select “Add” you will by default add the report to the “Retention Marketing” folder.

Edit – Allows you to edit the selected report.

Remove – Permanently removes the report or folder from the list. Use this with caution. Removed or deleted items are permanently removed.

Export – Exports the selected report to a user selectable location in an importable .vtx format. This file allows portability of reports that can be imported to another installation of SPOT.

Import – Imports a .vtx file from an exported report file.

Select the “+” next to the folder “Customer”. You will see a number of reports available that are based on customer information. Notice this is the same layout and list that you find in the “Reports Gallery”. You may modify this list and layout at any time. Be aware that any changes made to standard reports or layout may be lost in a future update of SPOT. Later in this chapter you will learn how to “lock” these reports. You will find three examples below of existing reports found in your system. If you selected any of the reports on this list and then select the “Edit” button you will be taken to the “Edit SPOT Query Item” tab.
**Edit SPOT Query Item**

You will now see the detailed Item screen that will allow configuration of the report name, description, organization, content and presentation of the report. The sample below is the “Route Reminder List” report.

![Edit SPOT Query Item](image)

1. **Specify General Information** – This section holds the name and description information for the report. Notice this is labeled section 1 of 3 sections. You will need to complete section 1, 2 and 3 for a report to be valid and work properly.

   **Query Name** - This is the name of the report as it will be displayed in the “Reports Gallery”.

   **Description** – This is the description and report details as displayed in the details section of the “Reports Gallery” information screen.

   **Collection** – This defines the folder or location that the report will be displayed in both the Reports Gallery and SPOT Query.

   **Lock Item** – If you choose to modify any of our standard reports you will want to check this box. With this box enabled the report will not be updated by any future SPOT updates.

2. **Identify Data Source** –

   **Data Source** – Defines the source of data that will be used to create the record set. Valid options here are “SPOT Query Builder” or SQL Statement” if you are creating a report yourself. If the report is pre-defined as “Custom Handler” it is a SBS created report and the record set cannot be modified.

This is an example of an existing report “A/R Account Activity”. You will find this report in the Reports Gallery under the A/R tab. This report’s record set is generated by SBS internally to the program as noted with the Custom Handler data source.
As discussed earlier the “Custom Handler” type means the report's record set and you may not modify contents. The name, description and organization may be modified at any time but the Data Source may not be. In some reports which use the “Custom Handler” data sources, you may be able to edit the presentation but not the data source.

This view is an example of the “Route Reminder List”. You will find this report in Reports Gallery under the Customer tab. This report has a data source of “SPOT Query Builder” and can be modified by you at both the record set level and the presentation level.

This view is an example of the “Lost Tuna Report”. You will find this report in Reports Gallery under the Customer tab. This report has a data source of “SQL Statement” and can be modified by you at both the record set level and the presentation level. Notice this report has 4 different presentations listed. We will discuss these setting later in this document.
Now that you understand the “Edit SPOT Query Item” screen let’s go back to the “SPOT Query Settings” tab by pressing the “Cancel” button. Now select the Customer folder to display the following screen.
Creating a Basic Customer Report

Step 1 - From the SPOT Query Settings screen select the “Add” button located at the bottom of the Items list. This will create a new report definition and take you to the Item list as shown.

Step 2 - Enter the following information in the provided fields

- **Query Name**: My Customer Report
- **Descriptions**: My first report in SPOT Query with Name, Address and Phone
- **Collection**: Select “Customer”
**Data Source:** SPOT Query Builder

At this time leave section 3 - Edit Presentations Settings - blank. This will be used after the record set has been created. Your Item list should now look like the screen below.

### Step 3 - In section 2 - Identify the Data Source - select the “Settings” button to display the “Edit Data Source Settings” screen as shown.

### Step 4 - Select the line “SPOT Query Builder Settings” to display the meta settings for the record set.
Step 5 - Select the “Edit” button next to the Settings in the right hand pane of the window. This will take you to the final “Edit Settings” page for the report.

At this point you are like an artist and you now have a blank canvas to start working. We started this exercise to create a Customer report with Name, Address and Phone number. We will now select the fields needed to complete the record set.

Step 6 - In the “Domains” dialog either select “Customer” from the pull down or scroll down to the “Customer” section of the screen.

Step 7 - From the customer section / domains select the following fields from the list. It does not matter what order you select these in. It is only important that you have all fields present. You may select an item by placing your mouse on the item and double clicking or by placing your mouse on the item and pressing the “Add to Query” button below the fields list.

Address1
City
State/Province
Postal Code
Primary Phone
Name
Step 8 - Your screen should now look like the screen below.

Step 9 - Press “Ok” on this screen as it returns you to the “Edit SPOT Query Item” screen. Congratulations you have just created your first record set. This record set is now ready to be used in a presentation and output to a report.

Step 10 - Press the “Add” button in section 3 - Edit Presentation Settings. This will prompt you with the following windows.

Enter the following information in these fields.

Name: My Customer Report  
Type: Crystal Report

Step 11 - Select the “Settings…” button on this screen. This will take you to the “Edit Presentations Handler Settings” Screen as shown below.
Step 12 - Select the “Crystal Reports Settings” line on the screen.

Step 13 - Leaving all defaults in this window press the “Edit” button next to “Layout Designer”.

Step 14 - You are now viewing the “Edit Layout Designer” screen as shown below.
This screen is automatically populated with all the fields you created in the record set. This screen should explain why this is the “Presentation” portion of the report. You can configure the presentation or look of the report from this screen. Notice you have the following:

Title
Margins
Orientation
Header
Group details that will allow you to make any changes to the look and feel of this report needed including fonts, alignment and width of fields.

**Step 15** - For this exercise select the “Customer:Name” line in the “Report Groups” field and use the up arrow to the right of the field to move the customer name to the top of the list. This is the order that the columns will display on the report. Your screen should now look like the sample below.

Notice that when you change the order of the fields in the “Report Groups” it changes the sort order of the lines in “Group detail” at the same time. You may also use the “Move Up” or “Move Down” buttons in the “Group Detail” screen to change the order of fields.

**Step 16** - Change the following field’s information to match below:
Margin
  Left: .50
  Right: .50

This will modify the margins on the report and increase the width of the report by 1”. Notice in the group detail section each line has a “Width” option. This is the physical size of the column when it prints on your document. We currently have 6 fields with 1" for each field or 6" of defined printing. The width of margins is .5” each or 1” of printing for a total of 7” of printing width. Make sure the total width of printing and margins does not exceed the width of the paper being used. You can modify printing column width at any time in the presentation. There is standard width for commonly used fields documented later in this chapter.

Select the “OK” button

**Step 17** - Select “OK” on the “Edit Presentation Handler Settings” screen.

**Step 18** - Select “OK” on the “Edit Presentation” screen.

**Step 19** - Congratulations. You have now completed your first report presentation. With the presentation completed the report is now ready to be used. Your screen should now look like the following:

![Image of edit presentation settings]

Select the “OK” button and return to the “SPOT Query Settings” screen.

**Step 20** - Select the “Close” button on this screen.

**Step 21** - Run your newly created report. Go to Reports → Reports Gallery → Customer → My Customer Report. You will now see your report with the defined fields, column layout and margins you have configured.

Modify your Basic Customer Report Layout

You are able to go back to step 14 of the “Creating a Basic Customer Report” section and make any modifications to the layout you would like. You may want to change paper orientation, fonts of each field, column width etc. to make yourself familiar with the presentation side of the report.

Modify your Basic Customer Report Record Set

Let’s say we want to change our basic customer report to show only customers sorted by name that have visited the store since a given date range. To make these modifications you will need to get back into the configuration side of the report. You can do this as discussed earlier in this document via Setup → SPOT Query or by the shortcut via the Reports Gallery tab. This will show the shortcut to modification of an existing report.
reports record set and presentations. This shortcut only works with existing reports. If you intend on creating a new report you must use the Setup → SPOT Query process.

Step 1 - Navigate to Reports → Reports Gallery and select the report you would like to modify. In this example this report is under Customers → My Customer Report. Select the report and then select your left mouse button on the report.

Step 2 - Select the “Edit…” button that is presented.

Step 3 - You now see the “Edit SPOT Query Item” menu and should be familiar with this screen as you created it earlier in this chapter.

Step 4 - Select the “Settings” in the data source section.

Step 5 - In section 2 - Identify the Data Source - select the “Settings” button to display the “Edit Data Source Settings” screen as shown.
Step 6 - Select the line “SPOT Query Builder Settings” to display the meta settings for the record set.

Step 7 - Select the “Edit” button next to the Settings in the right hand pane of the window. This will take you to the final “Edit Settings” page for the report.
You have this record set defined with Customer Name, Address, City, State, Zip and Phone number.

**Step 8** - In the “Domains” dialog either select “Customer” from the pull down or scroll down to the “Customer” section of the screen.

**Step 9** - From the customer section / domain select the following fields from the list.

Last Visit Date

**Step 10** - Your screen should now look like the screen below. This exercise is to allow you to show all customers that have not visited in a given date range. You have now added the “Last Visit Date” to the record set.

**Step 11** - In the query filters screen select the “Last Visit Date” field in the first “Field” dropdown window.

**Step 12** - On this same line select the “date range” operator.

**Step 13** - In the “Value” column of this line select the “Click on Select” button and choose the “Ask on View” button. This option will prompt you for a date range at the time the report is run.
Step 14 - Select the “OK” button.

Step 15 - Change the “Sort by:” field to have the “Customer:Name” selected. This option will sort the report by name in ascending order.

Step 16 - Your “Edit Settings” screen should look similar to the screen below.

Step 17 - Select “Ok” on this screen to return to the report gallery.

Step 18 - You are now ready to run the updated “My Customer Report”. Notice the report prompts for a date range for the last visit.

Advanced SPOT Query Builder Options

Predefined Operators
Below are examples of popular filters used in developing reports. Notice each filter has “operator” options. The options listed are:

- > Greater than
- >= Greater than or Equal to
- < Less than
- <= Less than or Equal to
- <> Not equal to
- = Equal to
Between
Is empty
Is not empty
Date Range
Starts With
Contains

**Manual Operators**

- `~getdate() - 30` Uses today's date and subtracts 30 days
- `~getdate() - 45` Uses today's date and subtracts 45 days
- `~getdate() - 60` Uses today's date and subtracts 60 days
- `~getdate() - 90` Uses today's date and subtracts 90 days

- `~` This will allow any SQL based function to be attached and passed to the filter.

The example below will return all customers that have not been in for more than 45 days but no more than 330 days, had total sales of more than $100 and is a route customer. This query filter was applied so that they could keep the returned record set below 400 listings. This customer uses the 330-day number to control the number of customers that are being returned.

![SQL Filter Example](image)

**Using SQL Statements as a Data Source**

When using a Data source type of “SQL Statement” you have access to any data that is contained in the SPOT database. By saying you have access to all data you must understand SQL before attempting to use this data source type. This document will not teach the use of SQL Statements. You will find below parameters defined in SPOT Query to support advanced usage of SQL Statements and examples.

**Available SQL based SPOT Parameters**

- `@Date(p1;p2;p3)` – Prompts for date
- `@DateRange(p1)` – Prompts for date range
- `@Site(p1;p2;p3)` – Prompts for Store / All Stores
- `@Route(p1;p2;p3)` – Prompts for Route
- `@Customer(p1)` – Prompts for customer
- `@BillingGroup(p1;p2;p3)` – Prompts for billing Group
- `@PromotionGroup(p1;p2;p3)` – Prompts for Promotions Group
- `@WorkFlowStep(p1;p2;p3)` – Prompt for Process Step
- `@User(p1;p2;p3)` – Prompts for user
- `@Response(p1;p2;p3;p4)` – User definable unrestricted entry
  - Param1 = argument (field?)
  - Param2 = caption (prompt user)
  - Param3 = operator (compare)
Param3 = aggregator (count, sum, all, etc)

Sample SQL Statement – “My Customer Report”

SELECT
  [SPOT2000].[dbo].[ClientAccount].[Address1] AS [Customer:Address1],
  [SPOT2000].[dbo].[ClientAccount].[City] AS [Customer:City],
  [SPOT2000].[dbo].[ClientAccount].[State] AS [Customer:State/Province],
  [SPOT2000].[dbo].[ClientAccount].[Phone] AS [Customer:Primary Phone],
  [SPOT2000].[dbo].[ClientAccount].[Name] AS [Customer:Name],
  [SPOT2000].[dbo].[ClientAccount].[LastVisitDateTime] AS [Customer:Last Visit DateTime]
FROM
  [SPOT2000].[dbo].[ClientAccount] WITH (NOLOCK)
WHERE
  [SPOT2000].[dbo].[ClientAccount].[LastVisitDateTime] >= '01/01/04 00:00:00' AND
  [SPOT2000].[dbo].[ClientAccount].[LastVisitDateTime] <= '06/04/04 23:59:59'
ORDER BY
  [SPOT2000].[dbo].[ClientAccount].[Name] Asc

Sample SQL Statement – Lost Tuna Report

SELECT
  Name, PhoneDisplay AS PhoneNumber,
  Address1, Address2, City, State,
  CASE WHEN LEN(Zip) > 5 THEN LEFT(Zip, 5) + '.' + SUBSTRING(Zip, 6, 5)
  ELSE Zip END AS Zip,
  LastVisitDateTime AS LastVisit,
  SUM(Price) AS TotalSales, AVG(Price) AS AverageSale,
  SUM(PieceCount) AS Pieces,
  ClientAccount.LexicalKey AS [Customer:Customer Number]
FROM
  Invoice WITH (NOLOCK) INNER JOIN ClientAccount WITH (NOLOCK)
  ON Invoice.ClientAccountID = ClientAccount.InstanceID
WHERE
  Invoice.ClientAccountID IN (SELECT DISTINCT InstanceID FROM
  ClientAccount WHERE @Site(Invoice.SPAccountNodeID; Select Store)
  AND @Date(LastVisitDateTime; Inactive Date; <)) AND
  @DateRange(InProcessDateTime; Select Sales Period) AND
  Voided = 0
GROUP BY
  Name, PhoneDisplay, Address1, Address2, City, State,
  CASE WHEN LEN(Zip) > 5 THEN LEFT(Zip, 5) + '.' + SUBSTRING(Zip, 6, 5)
  ELSE Zip END, LastVisitDateTime,
  ClientAccount.LexicalKey
HAVING
  @Response(Price; Minimum Sales Amount; >; Sum)
ORDER BY
  Name
### Importing Data

**Overview**

This document is intended to give instructions as to what fields can be imported into SPOT. This data can be hand entered, exported from other systems or acquired from third-party data vendors. Please use caution when importing. SBS recommends a test run import and then revivification of data before imported data is used in a live system. If the CustomerID or ID fields are not used correctly this may cause customers to be duplicated in the import. Please use the CustomerID field as the key to all imports. If you are importing for the first time you may not have the CustomerID field. SPOT will create this key for you during the import.

**SPOT Import Fields**

The following fields are available for import from Microsoft Excel. Use these field names as valid column headers for importing data into SPOT using our Import utility and a Microsoft Excel spreadsheet. Not all headers are required for customer import. Use the “Suggested Counter” customer import fields as a guide to start your import.

*Note these are minimum required fields your initial import of customer data.*

<table>
<thead>
<tr>
<th>Suggested Import Fields*</th>
<th>These fields will create a basis for importing customers and customer information into SPOT and should be used as a basic guideline.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Header</strong></td>
<td><strong>Type</strong></td>
</tr>
<tr>
<td>CUSTOMERID</td>
<td>Text</td>
</tr>
<tr>
<td>*FULLNAME</td>
<td>Text</td>
</tr>
<tr>
<td>LASTNAME</td>
<td>Text</td>
</tr>
<tr>
<td>FIRSTNAME</td>
<td>Text</td>
</tr>
<tr>
<td>ADDRESS1</td>
<td>Text</td>
</tr>
<tr>
<td>ADDRESS2</td>
<td>Text</td>
</tr>
<tr>
<td>CITY</td>
<td>Text</td>
</tr>
<tr>
<td>STATE</td>
<td>Text</td>
</tr>
<tr>
<td>ZIP</td>
<td>Text</td>
</tr>
<tr>
<td>*PHONE</td>
<td>Numeric</td>
</tr>
<tr>
<td>PHONE2</td>
<td>Numeric</td>
</tr>
<tr>
<td>EMAILADDRESS</td>
<td>Text</td>
</tr>
<tr>
<td>EMAILADDRESS2</td>
<td>Text</td>
</tr>
<tr>
<td>DISCOUNTGROUP</td>
<td>Text</td>
</tr>
<tr>
<td>DISCOUNTGROUPEXPIRATION</td>
<td>Date (mm/dd/yy only)</td>
</tr>
<tr>
<td>PRICETABLE</td>
<td>Text</td>
</tr>
<tr>
<td>PREFERENCE1</td>
<td>Text</td>
</tr>
<tr>
<td>PREFERENCE2</td>
<td>Text</td>
</tr>
<tr>
<td>MEMO1</td>
<td>Text</td>
</tr>
<tr>
<td>MEMO2</td>
<td>Text</td>
</tr>
<tr>
<td>PRINTMEMO1</td>
<td>Text</td>
</tr>
<tr>
<td>PRINTMEMO2</td>
<td>Text</td>
</tr>
<tr>
<td>DISABLENOTIFY1</td>
<td>Text</td>
</tr>
<tr>
<td>DISABLENOTIFY2</td>
<td>Text</td>
</tr>
<tr>
<td>CREATEDDATE</td>
<td>Date (mm/dd/yy only)</td>
</tr>
<tr>
<td>SIGNUPDATE</td>
<td>Date (mm/dd/yy only)</td>
</tr>
<tr>
<td>ACTIVE</td>
<td>Text</td>
</tr>
<tr>
<td>PRICELEVEL</td>
<td>Text</td>
</tr>
<tr>
<td>COMMENTS</td>
<td>Text</td>
</tr>
<tr>
<td>NODENUMBER</td>
<td>Text</td>
</tr>
</tbody>
</table>
a store other than the local store. Do not use this field when importing customers with route assignments.

<table>
<thead>
<tr>
<th>STATUS</th>
<th>Text</th>
<th>Active, Inactive or map able at import</th>
</tr>
</thead>
</table>

### Route Customer Fields

<table>
<thead>
<tr>
<th>ROUTENAME</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>ROUTESTOP</td>
<td>Numeric</td>
</tr>
<tr>
<td>ROUTEADDRESS1</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEADDRESS2</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTECITY</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTESTATE</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEZIP</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEINSTRUCTIONS</td>
<td>Text</td>
</tr>
<tr>
<td>BUSINESSADDRESSEE</td>
<td>Text</td>
</tr>
<tr>
<td>BUSINESSADDRESS1</td>
<td>Text</td>
</tr>
<tr>
<td>BUSINESSADDRESS2</td>
<td>Text</td>
</tr>
<tr>
<td>BUSINESSCITY</td>
<td>Text</td>
</tr>
<tr>
<td>BUSINESSSTATE</td>
<td>Text</td>
</tr>
<tr>
<td>BUSINESSZIP</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO1</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO2</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO3</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO4</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO5</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO6</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO7</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO8</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO9</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMEMO10</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEMON</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTETUE</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEWED</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTETHU</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTEFRI</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTESAT</td>
<td>Text</td>
</tr>
<tr>
<td>ROUTESUN</td>
<td>Text</td>
</tr>
</tbody>
</table>

### Route – Customer specific enabled customers only

<table>
<thead>
<tr>
<th>PICKUPMON</th>
<th>Text</th>
<th>Yes / No</th>
</tr>
</thead>
<tbody>
<tr>
<td>PICKUPTUE</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>PICKUPWED</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>PICKUPTHU</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>PICKUPFRI</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>PICKUPSAT</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>PICKUPSUN</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>DELIVERYMON</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>DELIVERYTUE</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>DELIVERWED</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>DELIVERYTHU</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>DELIVERYFRI</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>DELIVERYSAT</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>DELIVERYSUN</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>PICKUPTYPE</td>
<td>Text</td>
<td>(S) Scheduled or (O) On-Demand</td>
</tr>
<tr>
<td>DELIVERYTYPE</td>
<td>Text</td>
<td>(S) Scheduled or (O) On-Demand</td>
</tr>
</tbody>
</table>

### A/R CCOF Customer Fields

<table>
<thead>
<tr>
<th>AR</th>
<th>Text</th>
<th>Yes / No / Sub (Case Sensitive) or Y/N/S Using the “Sub” or “S” option will require you to populate the AR_ACCNUM field with the master customer account number. The master customer record must also be imported prior to importing a sub account.</th>
</tr>
</thead>
<tbody>
<tr>
<td>CREDITCARDNUMBER</td>
<td>Number</td>
<td>Numbers only no formatting</td>
</tr>
<tr>
<td>CREDITCARDEXPIRATION</td>
<td>Text</td>
<td>Must Be MM-YY</td>
</tr>
<tr>
<td>CREDITCARDNUMBER2</td>
<td>Number</td>
<td>Numbers only no formatting</td>
</tr>
<tr>
<td>CREDITCARDEXPIRATION2</td>
<td>Text</td>
<td>Must Be MM-YY</td>
</tr>
<tr>
<td>Field Name</td>
<td>Datatype</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>CREDITCARDTOKEN</td>
<td>Text</td>
<td>Requires CREDITCARDEXPIRATION field formatted “VISA *1234” that indicates card type and last 4 digits of the card number.</td>
</tr>
<tr>
<td>AR_BALANCEFORWARD</td>
<td>Currency</td>
<td></td>
</tr>
<tr>
<td>AR_ACCNUM</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>AR_FINANCECHARGE</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>AR_DISCOUNT</td>
<td>Numeric</td>
<td>%</td>
</tr>
<tr>
<td>AR_PAYBYCC</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>AR_PAYMENTPRECEDENCE</td>
<td>Text</td>
<td>CC/Acct on Decline or Acct/CC Overdue or Acct/CC Total</td>
</tr>
<tr>
<td>AR_BALANCEFORWARD</td>
<td>Currency</td>
<td></td>
</tr>
<tr>
<td>BILLINGADDRESSEE</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>BILLINGADDRESS</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>BILLINGADDRESS1</td>
<td>Text</td>
<td>Same as BILLINGADDRESS</td>
</tr>
<tr>
<td>BILLINGADDRESS2</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>BILLINGCITY</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>BILLINGSTATE</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>BILLINGZIP</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>CREDITLIMIT</td>
<td>Currency</td>
<td>Must be Automatic, Prompt, Never and is not a map able/validated field during the import</td>
</tr>
<tr>
<td>AR_BILLINGGROUP</td>
<td>Text</td>
<td>Exact match or use mapping at import</td>
</tr>
<tr>
<td>CREDITCARDUSAGE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Optional Customer Fields</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ID</td>
<td>Text</td>
<td>Same as CustomerID, except that it looks up via an External ID (from the Details tab)</td>
</tr>
<tr>
<td>EMAILADDRESS3</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>EMAILADDRESS4</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PHONE3</td>
<td>Numeric</td>
<td>No formatting required and preferred</td>
</tr>
<tr>
<td>PHONE4</td>
<td>Numeric</td>
<td>No formatting required and preferred</td>
</tr>
<tr>
<td>PHONE5</td>
<td>Numeric</td>
<td>No formatting required and preferred</td>
</tr>
<tr>
<td>PHONE6</td>
<td>Numeric</td>
<td>No formatting required and preferred</td>
</tr>
<tr>
<td>PREFERENCE3</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE4</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE5</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE6</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE7</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE8</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE9</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE10</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE11</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE12</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE13</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>PREFERENCE14</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>MEMO3</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>MEMO4</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>MEMO5</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>MEMO6</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>MEMO7</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>MEMO8</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>MEMO9</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>MEMO10</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>PRINTMEMO3</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>PRINTMEMO4</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>PRINTMEMO5</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>PRINTMEMO6</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>PRINTMEMO7</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>PRINTMEMO8</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>PRINTMEMO9</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>PRINTMEMO10</td>
<td>Text</td>
<td>Using a // in the field creates new line</td>
</tr>
<tr>
<td>DISABLENOTIFY3 – 10</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>DRIVERSLICENSE</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>DRIVERSLICENSEEXP</td>
<td>Text</td>
<td>Must Be mm-yyyy</td>
</tr>
<tr>
<td>VIP</td>
<td>Text</td>
<td>Yes / No</td>
</tr>
<tr>
<td>LOCKERPIN</td>
<td>Numeric</td>
<td>4 digits</td>
</tr>
<tr>
<td>Field</td>
<td>Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>FREQUENTFLYERTYPE</td>
<td>Text</td>
<td>Match the Name of the customer field in configuration</td>
</tr>
<tr>
<td>FREQUENTFLYERNUMBER</td>
<td>Text</td>
<td>This is only available if the customer is set to a type of Hotel or Business.</td>
</tr>
<tr>
<td>CHARITYPROGRAMNAME</td>
<td>Text</td>
<td>Will attempt to parse the name into a “Last, First” format for customer’s types of Individual and Employee.</td>
</tr>
<tr>
<td>CHARITYPROGRAMEXPIRES</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>CUSTOM Customer Fields</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>CONTACT</td>
<td>Text</td>
<td>This is only available if the customer is set to a type of Hotel or Business.</td>
</tr>
<tr>
<td>FULLNAME</td>
<td>Text</td>
<td>Will attempt to parse the name into a “Last, First” format for customer’s types of Individual and Employee.</td>
</tr>
<tr>
<td>BIRTHDATE</td>
<td>Date</td>
<td>MM/DD/YY only</td>
</tr>
<tr>
<td>EXTIDx</td>
<td>Text</td>
<td>X may be 1 = 7, defines the customer extended lookup identifiers</td>
</tr>
<tr>
<td>CASHCREDIT</td>
<td>Currency</td>
<td>Customers Referral source</td>
</tr>
<tr>
<td>REFERRALSOURCE</td>
<td>Text</td>
<td>Customers Referral source detailed information</td>
</tr>
<tr>
<td>REWARDSPROFILE</td>
<td>Text</td>
<td>Customer reward profile</td>
</tr>
<tr>
<td>REWARDSPLAN</td>
<td>Text</td>
<td>Customer reward plan</td>
</tr>
<tr>
<td>REWARDSBALANCE</td>
<td>Numeric</td>
<td>Customer reward balance</td>
</tr>
<tr>
<td>NODENUMBER</td>
<td>Text</td>
<td>This field may be used to specify the primary store number for the imported customer. NOTE - If the customer belongs to a route, the system will NOT map the route if the customer belongs to a store other than the local store. Do not use this field when importing customers with route assignments.</td>
</tr>
<tr>
<td>TYPE</td>
<td>Text</td>
<td>Use “Individual”, “Business”, “Hotel” or “Employee”. Blank, missing or unknown defaults to “Individual”.</td>
</tr>
<tr>
<td>DISABLEMARKETING</td>
<td>Text</td>
<td>1 or True – Option found on the customer reminder tab to disable all reminders.</td>
</tr>
<tr>
<td>CUSTOMERID</td>
<td>Text</td>
<td>1 to 10 characters of alpha numeric and must correspond to the “CustomerID” field of an existing customer</td>
</tr>
<tr>
<td>ID</td>
<td>Text</td>
<td>1 to 10 characters of alpha numeric and must correspond to the “ExternalID” field of an existing customer</td>
</tr>
<tr>
<td>Route</td>
<td>Text</td>
<td>Yes / No Creates invoice as counter or route order.</td>
</tr>
<tr>
<td>CURRENTSTATUS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>SOLDDATETIME</td>
<td>Date</td>
<td>Required for sold orders</td>
</tr>
<tr>
<td>DETAILEDDATETIME</td>
<td>Date</td>
<td>Required on all orders</td>
</tr>
<tr>
<td>RACKEDDATETIME</td>
<td>Date</td>
<td>Required on all ready orders</td>
</tr>
<tr>
<td>INITIALVISITDATETIME</td>
<td>Date</td>
<td>Required on all orders</td>
</tr>
<tr>
<td>PRICETABLE</td>
<td>Text</td>
<td>Use exact naming to current price tables or use mapping during import</td>
</tr>
<tr>
<td>INVOICEKEY</td>
<td>Numeric</td>
<td>Max 6 digit number required for all orders</td>
</tr>
<tr>
<td>DEPARTMENT</td>
<td>Text</td>
<td>Field needs to match a current department required for all orders. Must follow the “PriceTable” field entries.</td>
</tr>
<tr>
<td>PIECES</td>
<td>Text</td>
<td>Valid number of pieces in the order. Required for all orders</td>
</tr>
<tr>
<td>PRICE</td>
<td>Currency</td>
<td>Price of Order</td>
</tr>
</tbody>
</table>

**Invoice Fields**

Invoice imports are supported on a limited basis and is generally not an option. The ability to import invoice detail is dependent upon invoice content, details, barcode type, barcode layout, number sequence, tax calculations, balance due among other compatibility and required invoice attributes.
<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAID</td>
<td>Currency</td>
<td>Amount paid, will always be considered as ‘Cash’</td>
</tr>
<tr>
<td>INVOICECOMMENT</td>
<td>Text</td>
<td>Alpha numeric text for invoice comments – Limited to 128 characters</td>
</tr>
<tr>
<td>RACKLOC</td>
<td>Text</td>
<td>Alpha numeric text of current rack location required for all ready orders</td>
</tr>
<tr>
<td>PROMISEDDATETIME</td>
<td>Date</td>
<td>Required on all ready orders</td>
</tr>
<tr>
<td><strong>Basic Heat Seal Label (HSL) Fields</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>HSLKey</td>
<td>Text</td>
<td>Number found on HSL label when scanned</td>
</tr>
<tr>
<td>CustomerID</td>
<td>Text</td>
<td>CustomerID of the customer you are assigning the label</td>
</tr>
<tr>
<td>Department</td>
<td>Text</td>
<td>Department name found in Price Table</td>
</tr>
<tr>
<td>Category</td>
<td>Text</td>
<td>Category name found in department</td>
</tr>
<tr>
<td>Item</td>
<td>Text</td>
<td>Item name found in category</td>
</tr>
<tr>
<td><strong>Custom Heat Seal Label Fields</strong>*</td>
<td></td>
<td></td>
</tr>
<tr>
<td>HSLKey</td>
<td>Text</td>
<td>Number found on HSL label when scanned</td>
</tr>
<tr>
<td>PriceTable</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>CustomerID</td>
<td>Text</td>
<td>CustomerID found in Price Table</td>
</tr>
<tr>
<td>CustomerName</td>
<td>Text</td>
<td>Optional</td>
</tr>
<tr>
<td>Department</td>
<td>Text</td>
<td>Exact match or use mapping at import</td>
</tr>
<tr>
<td>Category</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>Item</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>UpCharges</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>ExtraCharges</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>Colors</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>Brands</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td>Patterns</td>
<td>Text</td>
<td></td>
</tr>
<tr>
<td><strong>Price Table Import</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRICETABLENAME</td>
<td></td>
<td>required, will load if it exists for modification</td>
</tr>
<tr>
<td>PRICETABLEID</td>
<td></td>
<td>Optional guid</td>
</tr>
<tr>
<td>DEPARTMENTGROUPNAME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Workflow Template</td>
<td>&quot;Standard&quot;</td>
<td></td>
</tr>
<tr>
<td>ID</td>
<td>&quot;&quot;</td>
<td></td>
</tr>
<tr>
<td>PPOH Category</td>
<td>&quot;&quot;</td>
<td></td>
</tr>
<tr>
<td>Default Tag Pattern</td>
<td>&quot;&quot;</td>
<td></td>
</tr>
<tr>
<td>MaxPieceCount</td>
<td>&quot;5&quot;</td>
<td></td>
</tr>
<tr>
<td>Group Name Abbreviation</td>
<td>Left 3 of</td>
<td>name</td>
</tr>
<tr>
<td>Invoice Copy Override</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENTGROUPID</td>
<td></td>
<td>Optional guid</td>
</tr>
<tr>
<td>DEPARTMENTGROUPMAXPIECECOUNT</td>
<td></td>
<td>Optional Number</td>
</tr>
<tr>
<td>DEPARTMENTGROUPABBREVIATION</td>
<td></td>
<td>Optional</td>
</tr>
<tr>
<td>INVOICECOPYOVERRIDE</td>
<td></td>
<td>Optional Number</td>
</tr>
<tr>
<td>DEPARTMENTNAME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Caution Load Amount</td>
<td>&quot;20000&quot;</td>
<td></td>
</tr>
<tr>
<td>Maximum Load Amount</td>
<td>&quot;20000&quot;</td>
<td></td>
</tr>
<tr>
<td>Quick Quantity Warning</td>
<td>&quot;20&quot;</td>
<td></td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------------</td>
<td>--------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENTID</td>
<td>Optional Number</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENTENVIROCHARGE</td>
<td>Optional</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENTENVIROCHARGE</td>
<td>Optional</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENTTAXABLE</td>
<td>Optional</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENTCAUTIONLOADAMOUNT</td>
<td>Optional</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENTMAXIMUMLOADAMOUNT</td>
<td>Optional</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENTQUICKQUANTITYWARNING</td>
<td>Optional</td>
<td></td>
</tr>
<tr>
<td>DEPARTMENTDETAILWARNINGTYPE</td>
<td>Optional</td>
<td></td>
</tr>
<tr>
<td>CATEGORYNAME</td>
<td>Sets</td>
<td></td>
</tr>
<tr>
<td>Describe &amp; Price Available</td>
<td>“Enabled”</td>
<td></td>
</tr>
<tr>
<td>Describe &amp; Price Conveyor Context</td>
<td>“Hanging”</td>
<td></td>
</tr>
<tr>
<td>Bag Item Name</td>
<td>“Bag”</td>
<td></td>
</tr>
<tr>
<td>Other fields all default to empty/0/disabled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>CATEGORYID</td>
<td>Optional guid</td>
<td></td>
</tr>
<tr>
<td>ITEMNAME</td>
<td>Sets</td>
<td></td>
</tr>
<tr>
<td>AllowDiscount</td>
<td>“1”</td>
<td></td>
</tr>
<tr>
<td>Allow Tracking</td>
<td>“1”</td>
<td></td>
</tr>
<tr>
<td>Conveyor Context</td>
<td>“Hanging”</td>
<td></td>
</tr>
<tr>
<td>Other fields all default to empty/0/disabled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITEMID</td>
<td>Optional guid</td>
<td></td>
</tr>
<tr>
<td>ITEMPRICE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITEMSKU</td>
<td>Number</td>
<td></td>
</tr>
<tr>
<td>ITEMUPCHARGETABLE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ITEMPIECES</td>
<td>Number</td>
<td></td>
</tr>
<tr>
<td>ITEMPIECECOUNTPROMPT</td>
<td>0 = False 1 = True</td>
<td></td>
</tr>
<tr>
<td>ITEMFORCEQUANTITY</td>
<td>0 = False 1 = True</td>
<td></td>
</tr>
<tr>
<td>ITEMALLOWDISCOUNT</td>
<td>0 = False 1 = True</td>
<td></td>
</tr>
<tr>
<td>ITEMSLOTOCCUPANCYPERCENTAGE</td>
<td>Number</td>
<td></td>
</tr>
<tr>
<td>ITEMDISABLEMODIFIERS</td>
<td>Only 1 modifier is supported</td>
<td></td>
</tr>
<tr>
<td>ITEMPRICEAT</td>
<td>set to one of the valid choices from the setup</td>
<td></td>
</tr>
<tr>
<td>ALLOWTRACKING</td>
<td>0 = False 1 = True</td>
<td></td>
</tr>
</tbody>
</table>

**There is NO validation on the values, so (for instance), check-box properties in the price table will accept text, but it won't mean anything at runtime. Upcharge tables are not checked to make sure they exist, Conveyor Context will accept anything, but again invalid values won't mean anything at runtime.**
Creating Import Files in Excel

A couple of tips for creating these files is you will need to verify that your column names are exactly what is listed in this document, if column headings are not exact the column will not be imported.

If you are importing a list that uses customers names and the names are not in a LASTNAME, FIRSTNAME format in the field you can use one of the following options to separate the data.
1. In Excel use the Data / Text to Columns option to separate the fields to separate columns. Please review the Microsoft Excel help for more information on the use of this utility
2. Use the following formula to parse the fields looking at the first and second spaces in the names.
   \[
   \text{LASTNAME: } =\text{IF(ISERROR(FIND(" ", A2)),A2,RIGHT(A2,LEN(A2)-FIND(" ",A2)))}
   \]
   \[
   \text{FIRSTNAME: } =\text{IF(ISERROR(FIND(" ", A3)),"",LEFT(A3,FIND(" ",A3)-1))}
   \]

Using either of these methods does not guarantee accurate data and you will want to verify that the customer names have been separated and formatted according to your needs.

Importing Data

A few things that need to be setup prior to your import are as follows:

Company Settings
   Discount groups
   A/R Billing groups
   Customer Number Prefix if Desired

Store Settings
   A/R Settings
      Default A/R – CC Precedence
      Default Billing group
   Customer Settings
      Default Discount Group
   Customer Rewards Settings
      Default Customer rewards Profile

Route Settings
   Use Customer Specific Route Setup

Site Defaults
   Default Area Code
   Default City
   Default Postal Code

Some or all of these setting may affect the customer import. Many of this setting need to be set prior to the import so that the new customers can inherit their settings. An example is Default billing group for A/R customers. If this is not set before the import you will have to change each customers billing group individually. Imagine having 500 customers that you need to do this with and you can see why it is so important to have SPOT configured prior to the import.

Step 1 - Prepare your Microsoft Excel file with column headers as noted above. You need to verify that you have the column headings spelled exactly as the fields above. A single misspelled character will cause the column not to import. Please review the screen below for a sample layout of the spreadsheet.
Step 2 – Navigate to the Home Page > Menu – F3 > / Process 1 of 2 > Import Export screen. You will see the screen layout as follows:

**Section 1** - “Select the file to Import”

This is the Excel file you are importing data from. This is the first step of the import. Once you have the file open you are ready to move on to section 2 of the import.

**Section 2** - “Verify File”
This process opens the spreadsheet and prompts what sheet you would like to use for the import. By default unless you renamed the sheet on your spreadsheet, use the “Sheet 1” option. This takes the spreadsheet selected for import in section 1 and does a quick scan of the data to verify it is valid data. If you have any exceptions it will let you know at this time. It verifies field types and numeric formats for validity.
Section 3 – “Resolve Terms”
This is a list of fields that map our spreadsheet data to SPOT settings and configuration options. If you choose the “Field to Resolve” drop down you may see fields that need further data mapping for the import to work. For instance, you may have the “Discount group” column on your import file. One of these discount groups is “15%”. As you can see we need to create a map of what the data file shows as the discount group and what SPOT will use to map this spreadsheet discount group to an existing discount group. If you select the “SPOT Value” pull down you will see the predefined items currently in SPOT.

If you find items in the “Resolve Terms” screen that do not map correctly such as the above mentioned discount group you will want to create the option item in SPOT and then run the import again so that your mappings will be correct. Many complicated imports will require field mappings. These mappings will be required any time you use Discount Groups, A/R, A/R Discount and Price Tables among others on the import field list. That will require you to create a Map from Spread Sheet data to SPOT meta data. Many imports have been done that have taken up to 7 or 8 dry runs at mapping before all settings were created for the import.

Once you have your entire field mappings resolved you will want to save the term file. This will allow you to exit the import and then reload the term file so that you will not have to re-map these fields again. This will only be used in more complicated imports as you import, review and find unresolved
items in the mapping and you are required to exit Import in order to create meta settings to complete the mapping.

Section 4 – “Review records for accuracy and perform the import”. Once you have all your field mappings resolved you are ready to import the files with this section. You will see a “Preview Import” button. This will process each row of the spreadsheet in a trial mode and validate term files and validity of data that will test field mappings. If you have any records that do not import you will be notified at this time. You will notice on this sample screen there are 3 records previewed and 0 records unresolved. This import is ready for the final import.

By pressing the “Import” button you will actually import the data from the spreadsheet into the SPOT database. Once this “Import” option is selected the records of the spreadsheet will be imported. Once the records are reports you will be notified of the total number of records and any errors that may have occurred.
What can customer import be used for?

Installing SPOT in your store for the first time and you have collected signup cards including customer's current information over a period of time that your office has entered into an Excel spreadsheet or Access Database.

Installing SPOT in your store for the first time and converting from an existing computer system. If you can export customer data from the old system we can import it into SPOT. Some systems have a simple export utility that others do not. Depending on the system, the export function may not be available.

**Updating customer records with validated address information** - You have three years worth of customer data and want to send a mailing list. You find most of your customers do not have valid address information. You can export the customer data and send it to one of many address verification firms for address updates. You then take the updated information and import using the CustomerID as the key and update the customer address information with the new validated address information.

**Things that can go wrong with an import**

Field headings do not match the list above and the column does not get imported
A/R Balances are not correct when importing
Discount groups are not mapped correctly
Price tables are not mapped correctly
Default A/R billings groups are not setup before import.

Suggestions for a good import are to use 10-20 customer records for a test import and to verify that the data is importing correctly. After the testing is done on these selected rows you can then move the import to all of the data in the import file.

If an import does go wrong you can always use the “Kill All” script to remove all customers and invoices that have been imported and then a second import can be run.

Importing is not an exact science and does require extensive knowledge of SPOT and its configurations to have a successful import. Please contact Technical Support if you have any questions or issues.
Accounts Receivable

Overview
Accounts receivable is one of the most complex and powerful features in SPOT. Many store owners are not in favor of offering monthly billing for customer convenience. SPOT will assist you in managing these customers and the balances they owe. We maintain open orders, payments, adjustments, automatic credit card payments along with the generation of billing statements for each account. Many of the features in this module are available on the customers A/R tab and are more advanced than most accounting packages. The advantages of using this feature are building customer loyalty with the ease and convenience of Accounts receivable.

When using the A/R module you have the option of using billing cycles to assist in cash flow, assessing late charges and interest to late paying customers, reducing the cost of mailing statements with the option to send an Email. These options and more are available to you when using the A/R module.

SPOT uses an open methodology when applying payments and calculating balances, interest etc. Each payment will pay for a specified invoice with the balance forward being displayed on each statement and in the Current, 30, 60 and 90 day aging periods.

Configuration Options

Company Settings
Navigate to Company Settings > A/R Settings and you will have the following settings available.

The configuration setting are explained in the lower portion of the properties window. By selecting the setting as shown above you will see an explanation of each setting. The following settings are used by the majority of SPOT users using A/R.

Use Master Billing Address – If enabled this setting will use the Master billing information on statements. If this is not enabled you will use the store and address information of the store you run statements in.

Use Statement Wizard – A new feature that is being developed at this time. Future documentation will elaborate on this setting.
Billing Groups – Ability to assign a customer a billing group for ease of statement generation, controlling cash flow, categorizing Credit Card on file customers. By default you have a Standard and CC Group. You may create as many billing groups as needed. The most popular usage of billing groups is to create a Week 1,2,3 and 4. You then assign these groups to customers and run statements every week of the months for ¼ of your customers.

By selecting the Billing Groups node it will expand and display all defined billing groups. After selecting a billing group you will have several options as shown below. Each option on this page is explained in the setup utility.

Selecting the “Edit” button from this screen will display a number of billing group options. These options will be explained below.

Billing Day – Day of the month you will normally use to generate statements. This is for reminder purposes only.

Due Day – Date that will be printed on the statement.

Interest Rate – The annual interest rate charged for overdue balances. 18% will equal a 1.5% monthly rate.

Interest Threshold – The minimum amount of interest required in order to be included and printed on the statement. An example of this would be a statement with $4.50 overdue and a threshold of $5.00 configured the interest will not be calculated on this statement.

Minimum Interest Charge – The minimum amount of interest needed to be assessed to a customer. If the “Minimum Interest Charge” is set to $0.50 and the statement has $0.49 calculated the statement will include the $0.50 minimum.
Late Charge – An additional fee assessed to late payments in addition to interest. This amount is a flat amount and is not calculated.

Late Charge Threshold – The minimum amount a customer owes before the “Late Charge” is assessed. An example of this fee is a customer has an overdue balance of $22.00 and the “Late Charge Threshold” is set to $25.00 the fee will not be assessed.

When to Assess? – You have the option to have SPOT automatically assess finance charges and late fees or you may manually apply adjustments for these fees. You have the option of using either “Automatic” or “Manual” to assess these fees.

Billing Entity – Enable this option and Select the “Entity Type” for either Restoration or Hotel customers. Special logic has been implemented for each entity type as noted below.

Entity Type – An entity is used to provide logic on how statements will run. The option is only active if the “Billing Entity” option is enabled.

Restoration – This entity type allows you to add all customers from a specific vendor or insurance company. The logic used for a restoration entity is that all customers assigned to this group will be printed on one statement with a single pager per customer. Billing address information will be used as configured. This allows all customers / jobs that are being billed to State Farm insurance company to be billed directly to “State Farm”. Each customer / Job will have a separate page.

Hotel – This entity type will group all “Hotel Divisions” together. If you are using hotels you will want to create a separate billing group per hotel unless you have multiple hotels with one billing address.

Billing Address 1, Billing Address 2, Billing City, Billing State, Billing Zip – Used when the billing entity is enabled and is used as billing information on the statement.

Discount Percent – Amount the statement will be discounted. An example of how to use this is you generate a statement with new charges of $100 and you have a discount configured for 10% SPOT will automatically generate a $10 discount for the statement. The discount is added to the statement as an Adjustment.

Please take the time to review Company settings and options not covered in this document by reviewing the Setup utilities built in documentation.

Store Settings
Navigate in setup to Store Settings > A/R Settings to configure store based setting. Each option on this page is explained in the setup utility.

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default A/R-CC Precedence</td>
<td>Credit Card</td>
</tr>
<tr>
<td>Default Billing Group</td>
<td>Standard</td>
</tr>
<tr>
<td>Prompt to apply payments at Pickup</td>
<td></td>
</tr>
<tr>
<td>Statement Comment/M mode</td>
<td>Combine Prompt and Customer Com</td>
</tr>
<tr>
<td>Statement E-Mail Subject</td>
<td>Your Statement</td>
</tr>
<tr>
<td>Statement E-Mail Filename</td>
<td>Statement.htm</td>
</tr>
</tbody>
</table>

Default A/R-CC Precedence – New A/R customers will be assigned this default. This setting is active if the customer has a Credit Card on file and is an A/R Customer.

Default Billing Group – New A/R customers will be assigned this default. The billing group may be changed at any time.
Statement Comment Mode – At the time of printing statements you have the option of either printing customer comments as defined by customer, use a manual comment that is entered at the time you run the statement or both.

Emailing Statements

Configuration
Email will save labor, statement paper, envelopes and postage. To Email statements you must have a valid Email service with the ability to send and Email message via a SMTP service, a quality internet connection and an ISP that will allow you to send bulk Emails. Bulk or Batch Emails may be seen as SPAM by many of the larger ISP’s and mail providers. When Emailing statements you may send an Email to 100’s of customers at a time and your ASP may react and disable the process so please verify with your ISP you are able to process Email with your account in this manner. SPOT does not provide an Email account to send Email so you are responsible for acquiring a valid account.

You will need a compatible Email account to use and configure SPOT for with this feature. Not all Email account will work with SPOT. The *account may be on a local mail server or provided by your ISP(see notes below). Consideration must be taken when sending bulk Emails to customers. Many ISP’s (Internet Service Providers) or customers will block Emails that are being sent in bulk as SPAM. This may cause problems with your Emails being blacklisted and your account being disabled. Please check with your ISP / Email provider for any anti SPAM configuration requirements you may need to follow before using SPOT to send these bulk Emails.

*In order to use any Email options in SPOT your Email provider “MUST” support “SMTP Relaying”. DO NOT attempt to configure SPOT with these Email options until you contact your current Email provider and ask these simple questions.

For standalone customers - “Do you support SMTP relaying from the current network I have SPOT running?”

For SBS hosted customers - “Do you support SMTP relaying from a network of 64.90.195.0 (Current SPOT apps servers network)?”

If the Email provider answers no to this question you will either need to find a mail provider that does support this or use an account available from SBS at a minimal charge. We offer our authenticated and secure SMTP relay services for a $75 setup fee and $20 per month. This fee will support all SPOT generated Email processes.

Store Settings

Email Settings – These settings are used by all Email based process in SPOT and only need to be setup one time as discussed in earlier chapters.

Return Address – Email address that will be used in the “From” line of your Email. Most mail servers will require a valid Email address in order for this to operate correctly. You will also want a valid Email in case the customer uses the “Reply” button on the Email.

SMTP Server – Location / Name of the Email server you will be delivering mail with. An example of a valid server address would be mail.yourdomain.com

SMTP Port – The default port used by most mail servers is 25. Please verify with the provider of your Email account to verify this setting.

Authentication Method – Verify with the provider of you Email account to verify what form of authentication is required. Your options are Basic and NTLM.

User Name – User that will used to authenticate to your mail server.
Password – Password that will used to authenticate to your mail server.

A/R settings

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default A/R-CC Precedence</td>
<td>Credit Card</td>
</tr>
<tr>
<td>Default Billing Group</td>
<td>Standard</td>
</tr>
<tr>
<td>Prompt to apply payments at Pickup</td>
<td></td>
</tr>
<tr>
<td>Statement Comment Mode</td>
<td>Combine Prompt and Customer Co</td>
</tr>
<tr>
<td>Statement E-Mail Subject</td>
<td>Your Statement</td>
</tr>
<tr>
<td>Statement E-Mail Filename</td>
<td>Statement.htm</td>
</tr>
</tbody>
</table>

Statement E-Mail Subject – Text that will be used on the Emails “Subject” Line

Statement E-Mail Filename – File that will generate the actual body text of the Email.

Report / Printing Settings

<table>
<thead>
<tr>
<th>Property Name</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Custom Statement File</td>
<td>Statement.rpt</td>
</tr>
<tr>
<td>Custom Statement File (E-Mail)</td>
<td></td>
</tr>
<tr>
<td>Default Counter,Delivery Grouping</td>
<td>All Separate</td>
</tr>
<tr>
<td>Default Store Grouping</td>
<td>Separate</td>
</tr>
<tr>
<td>Inclusive Tax Element Label</td>
<td>Inclusive Tax Element:</td>
</tr>
<tr>
<td>Invoice Copies</td>
<td>1</td>
</tr>
<tr>
<td>Order Manifest Cutoff Time</td>
<td>10:00</td>
</tr>
<tr>
<td>Reports Path</td>
<td>%APP\PATH\Reports</td>
</tr>
<tr>
<td>Custom Reports Path</td>
<td></td>
</tr>
</tbody>
</table>

Custom Statement File – If you are using pre printed forms supplied by SBS you will use the default fStatement.rpt in this option. If you are using a custom or printing to blank paper you will want to use any of the statements defined below for blank paper.

Custom Statement File (Email) - If you are Emailing statements you will to define this

Statement.rpt – This is the default layout and is used with SBS supplied statement forms.

Statement1.rpt – This is the new layout which will be the one that most customers will want to use for blank form statements or Emailed statements. It is meant to be printed on a blank sheet, i.e., it has all the fields it needs to stand alone. If the paper has a perforation 3 2/3 " high, then the customer has a return coupon available. This layout has sub account grouping, statement comments, and everything our regular formatted statement has.

Statement2.rpt – This is basically a statement that will be printed to a blank sheet of paper and includes boxes and field outlines. It is designed to be printed on letterhead. There is no grouping or separation by sub account, nor does it have statement comments. It’s missing the store info/address because their letterhead had that information in the upper left hand corner, along with a logo.

Statement3.rpt – This is basically Statement2.rpt with the store information added to the upper left hand corner, so it can be printed on a blank sheet of paper.

Statement4.rpt –
Statement5.rpt – This is statement 3 without the returned check and amount information replaced with return address information. This statement can be used if you supply a windowed return envelope with your statements.

Customer Profile Settings
Customer View > A/R CC > Statement Destination – You have the four options how to print or Email a customer's statement.

Print – The default setting for new customers the statement will be sent to the report printer when you choose print on the statement screen.

Email (.DOC File) – Statements will be sent to the customers Email address as an attachment in a .DOC file format. This format can be read by Microsoft Word and many other popular word processors

Email (.PDF File) – Statements will be sent to the customers Email address as an attachment in a .PDF file format. PDF require the Adobe Acrobat reader to review.

Email (.HTM File) – Statements will be sent to the customers Email address as an attachment in an .HTM file format. HTM file format can be read by any Browser and most any word processor.

Modify Emailed Statement Layout
Located in the C:\program files\sbs\spot2000\reports directory you will find a “Statement.htm” file. This file is the body of the Email being sent to the customer and the carrier of the .doc, .pdf or .htm file configured for the customer. You may modify this with any piece of software that will edit .htm files. Make sure you do not remove the @FirstName or any other tokens from the statement.

<table>
<thead>
<tr>
<th>Token</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>@FIRSTNAME</td>
<td>First name of customer</td>
</tr>
<tr>
<td>@LASTNAME</td>
<td>Last name of customer</td>
</tr>
<tr>
<td>@PIECES</td>
<td>Number of pieces in order / batch</td>
</tr>
<tr>
<td>@ORDERS</td>
<td>Number of order in batch</td>
</tr>
<tr>
<td>@PRICE</td>
<td>Price of invoice / batch</td>
</tr>
<tr>
<td>@COMPANYNAME</td>
<td>Company Name entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYCONTACT</td>
<td>Company Contact entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYEMAIL</td>
<td>Company Email entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYADDRESS1</td>
<td>Company Address entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYADDRESS2</td>
<td>Company Address 2 entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYCITY</td>
<td>Company City entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYSTATE</td>
<td>Company State entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@COMPANYZIP</td>
<td>Company Zip code entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STORENUMBER</td>
<td>Company Store Number entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STORENAME</td>
<td>Store Name entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STORECONTACT</td>
<td>Store Contact entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STOREEMAIL</td>
<td>Store Email entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STOREADDRESS1</td>
<td>Store Address entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STOREADDRESS2</td>
<td>Store Address2 entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STORECITY</td>
<td>Store City entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STORESTATE</td>
<td>Store State entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STOREZIP</td>
<td>Store Zip entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STOREPHONE</td>
<td>Store Phone entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@STOREFAX</td>
<td>Store Fax entered in Setup &gt; Location Information &gt; Company</td>
</tr>
<tr>
<td>@ROUTENAME</td>
<td>Route Name of customers assigned route</td>
</tr>
<tr>
<td>@CCTYPE</td>
<td>Credit Card on File type (MasterCard, Visa, AX)</td>
</tr>
<tr>
<td>@CCLAST4</td>
<td>Last 4 digits of Credit Card on file</td>
</tr>
</tbody>
</table>
Configure the Statement Layout Used for Emailed Statements

Store Settings > Report/Printing Settings > Customer Statement File (Email). This file if defined is used at the time a statement is Emailed. This option will allow you to have a preprinted form for mailed statements and a detailed statement for Emailed statements. If left blank Email will use the same format as the standard statement process.

Emailing Statements

As shown below notice the “Email Statement” button. Once you have selected the range of statements to view you will then send the statements by selecting the “E-Mail Statements” selection. This will send the statement to any customer with a valid Email address and the “Email” defined in the “Statement Destination” field on the customers A/R configuration defined in the customer view.

SBS would suggest that you test this feature using a couple of customers prior to sending mass Emails to customers. This will allow you to review the configuration options, Email content and layout of the statement. Improper configurations as discussed in this chapter will cause customer stress if the statement, Email and other content is not what they would expect.
**Tips, Tricks and Troubleshooting**

**Problem / Explanation**

**Can't find the statement(s) you're looking for in the Statement History tab**

1) You may not have set the selection criteria properly to view the desired statements. The most common problem is not setting the date range button so that it includes the closing date of the statements you wish to see. Or, not checking the store or billing group of the desired customers will cause their statements not to show up.

2) The list of statements is grouped together by billing group, then sorted by customer name. Sometimes you may not find the statement you're looking for because the customer's billing group is further down the list.

3) You have deleted the statements in question.

4) You only ran the statements in Trial mode, so they were never actually created.

**Statement doesn't show some invoices/payments that you know have been posted since the last statement**

1) You have already created a statement since the last known statement, and all of the items are on that statement. For example, if a statement was inadvertently created on the 31st of the month, and then you run your regular statements on the 1st of the next month, all the activity you're looking for is on the statements of the 31st.

2) When applying payments or running Automatic CCOF Payments, you changed the payment date to be too far in the past or future. If the payment date is prior to the closing date of the last statement, the payment will not show up on the current statement. If the payment date after the closing date of the current statement, it will not show up as well.

3) The invoices/payments occurred on the statement closing date, so they are not included on the statement for the reason outlined in Tip 1 below.

**Store's return address is blank on the statements.**

1) Check "Company Settings/A/R Settings/Use Master Billing Address" setting. If checked, enter the store's return address in the Master Billing Address properties immediately below. If not, make sure the store's billing address is completed in the Location Information dialog.

**A/R Tips**

1) Remember, the statement closing date is a cutoff date. All account activity up to but not including the closing date will be posted to the statement. Thus, if you want to show all activity through the end of the month, set the closing date to the first day of the following month. For most customers, the simplest and easiest way to run statements is to wait until at least the first day of the month.

2) If you delete a statement, any existing statements for that customer with a closing date after that of the deleted statement will NOT be deleted. Therefore, those subsequent statements will be invalid. You should always delete subsequent statements as well as the specific one(s) you want to delete; or, re-run the statements, which WILL delete subsequent statements (see tip 3 below).

3) If you re-run a statement, any existing statements for that customer with a closing date after that of the re-created statement will also be deleted. Thus, if you re-run a statement that is not the most current statement for that customer, you will need to re-run all subsequent statements to bring the customer's statements up to date.

4) If you are creating balance forward adjustments because you are just beginning to use SPOT, and you want to immediately implement finance charges, be aware that if a customer sends in partial payment on their account it will not be sufficient to close the balance forward, so they will be charged a finance charge on the entire balance forward, instead of the unpaid portion. It might be best to wait a few months before implementing finance charges so that all balance forwards are paid in full.
Customer Maintenance

Overview
Customer Maintenance is used to view and modify customers in batch. The customer maintenance screen reacts differently than other customer search screens. In all other screens you will return the customers orders, history, open invoices etc. In the Maintenance search you simply go directly to the “Customer View” and the detailed information screens. One other option you have with using customer maintenance is all “Inactive” customers will be display in “Gray”. This is the only place you are able to see the “Inactive” status customers. Inactive customers are not displayed in any other search screen other than this Maintenance search. You can control access to customer maintenance with the use of the “Customer Maintenance” activity right.

How to Use
1- Navigate to the Home Page > Menu – F3 > General 1 of 4 > Customer Maintenance
2- Search for a customer and select. You are taken directly to the customer view screen.
3- If you choose “Cancel” or “OK” you are returned to the customer search screen for your next search.
Customer Merge

Overview
Customer merge is used to “Merge” duplicate customers or customers that would like to share a single account and you do not want to lose/reset the statistics for each customer. You are able to merge any number of customers to a single account. The can be cash customers, A/R customers etc. Any balances for A/R, Cash Credits and purchases will be transferred to the merged customer. You will have the option to just move transaction information to the master and keep the secondary customers or delete the customers. Most of the time the customer merge will be used and the duplicate customer should be removed so they are not mistakenly used again in the future.

SPOT offers a “Manual” and an “Automated” merge option. The manual mode allows quick access for single name merging, the automated method will allow you to look at your entire data base and batch process merging of 1 to 2,500 customers at a time.

Advanced Configuration
SPOT offers two options for merging customers, a “Manual” or “Automated” merge. By default the Automated merge is not enabled and this will be the option most often used for managing duplicate customers.

1- Navigate to Company Settings > Customer Settings > Customer Merge Settings > Enable Automatic Merge Utility. Enable this option to enable the use of the Automated merge.

2- Modify the configuration option for “Name for Disabled Accounts Merge” and enter “Customers, Merged” as shown above.

3 – At this time you have the option of creating a list of Excluded Names, Excluded Phones or Excluded Addresses for use in the Automated merge. These can be added at any time and will make more sense once you start using the merge utility.
How to use Manual Mode

In this example we have 3 different entries for Ted Jones. We will merge them all to one customer record.

1- Navigate to the Home Page > Menu – F3 > General 1 of 1 > Customer Merge
2- Select “Manual” option

3- You will display the following screen for use with customer merge.

4- You will now need to decide what customer will be the correct “Master” customer. This is the customer that will receive information from other customers. Select the “Select Master” or F6 and select the “Master” customer.

5- In the example below Ted Jones was selected.
6. Notice the last visit, account, balance etc for the customer. Now use the “Add Record” button to add the next 2 duplicate Ted Jones accounts in the data base as shown below.

7. Notice that the duplicates are the same name and they both have a balance, in process orders, ready orders and sold orders. All of this information will be merged to the “Master” customer record.

8. Once you have selected the correct customers select the “Merge Now” button.

9. If you are prompted to verify the merge please read the prompt with care. As discussed customers with balances and orders are merged and may affect statements and balances.

10. Next you will be prompted to “Delete” the merged customers. In most cases you will select “Yes”. If you select the “No-Inactivate” option the customer will be left in the data base but will now have an inactive status.
10- Once the merger is completed select “Cancel” to return the Home Page

**How to use Automated Mode**

1- Navigate to the Home Page > Menu – F3 > General 1 of 1 > Customer Merge
2- Select “Automated” option

3- You will display the following screen for use with customer merge.

4- Select the “Select Filter” button to display the available filtering options.
5- Select the filter “Name”

6- Select “All Stores” and select a list of stores you would like to include in the merge data. I would suggest that you use “All Stores” as the default if you are using a centralized data base. This will give you access to all duplicate customers across all stores.
Select the “Load Data” button. This will load data and look at “all” customers in “all” stores and present them to you on screen.

8- Notice that you now have data populating the screen with “Master” with green Check marks for each duplicate customer name. This is the starting of the automated process in merging customers. The utility looks at customer names and then logically assigns the notion of a “Master” customer. This master customer will be the customer that will have all other duplicate customers merged. The “Load Data” process will load the first 2,500 records in the defined filter. If you have more than 2,500 names in the filter you will be warned, once you merge the first 2,500 you can run the merge again using the same filters and merging logic.

Use your scroll bar at the bottom of the screen to review the columns that are being displayed. All of this information is being used in determining your “Master” record. SPOT looks at activity, route status, number of invoices, signup data, last activity date, A/R status and reminders will all be used to determine what SPOT deems the best “Master” record.
Logic will apply that if the customer is a Route or A/R customer they will be selected to be a Master record.

Notice the column "!", if this has a "!" included there is some sort of conflict with the master record. In the example below, the Store Number is different from the Master record. You have the option to Select the "!" on the row and it will detail the conflicts for the record.

9- You will now select the duplicate customers that you would like to merge to the Master. By using your mouse left click in the "Merge" field for the duplicate customer. This will place a "red dot" in the "Merge" field. This is confirmation that you want the "Red Dot" enabled customers merged with the "Master" you had automatically selected. You also have the option of using your "Space Bar" on the keyboard to enable fast selection of duplicate names.

<table>
<thead>
<tr>
<th>Master</th>
<th>Merge</th>
<th>A</th>
<th>Store</th>
<th>Customer Name</th>
<th>Phone</th>
<th>Address</th>
<th>A/R Num</th>
<th>Route</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>1</td>
<td></td>
<td></td>
<td>asdf, asdf</td>
<td>111-222-3333</td>
<td>asdf, asdf, AL 12345</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✓</td>
<td>✓</td>
<td>1</td>
<td>2</td>
<td>asdf, asdf</td>
<td>111-222-3333</td>
<td>asdf, asdf, asdf, AL 12345</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

10- You have the option of changing the master record by selecting the "Master" column of any record in the filter. You can see by the example below that the "Master" Customer has been changed.

<table>
<thead>
<tr>
<th>Master</th>
<th>Merge</th>
<th>A</th>
<th>Store</th>
<th>Customer Name</th>
<th>Phone</th>
<th>Address</th>
<th>A/R Num</th>
<th>Route</th>
</tr>
</thead>
<tbody>
<tr>
<td>✓</td>
<td>✓</td>
<td>1</td>
<td>1</td>
<td>Customer, Joe</td>
<td>(801) 555-1212</td>
<td>12020 S 150 E, Draper, UT 84020</td>
<td>DC5 (M)</td>
<td>Route 1:6</td>
</tr>
<tr>
<td>✓</td>
<td>✓</td>
<td>1</td>
<td>1</td>
<td>Customer, Test</td>
<td>(312) 123-4567</td>
<td>400 N. La Salle Dr, Chicago, IL 60611 (A1598 (M))</td>
<td>TIF:206</td>
<td></td>
</tr>
</tbody>
</table>

11- Once you have your records selected to merge you will select the "Execute Merge" button on the screen. Notice any messages that may be displayed and either "Proceed" or "Return to List".

12- You will be prompted with a warning that the changes being made are "Irreversible". Please make note of this message, changes are "Irreversible" and will be permanent. If you are not sure select "No-Cancel"
13- Depending on the amount of customers in your merge filter, the merge may take 1-30 minutes to complete. Notice after the merge you have Names Crossed Out on the displayed list. These names have been merged and will not show up in customer search or a subsequent customer merge session. You will also that statistics have been updated reflecting changes made by the merge.

14- You have the option of printing the list display by selecting the “Print” button at the bottom of the merge customer screen. When you print this screen it will output directly to your report printer and will not be viewable on screen so be cautious if you have 100’s or 1,000’s of records on your screen.
Customer Rating

Overview
Customer ratings are defined so that a user of SPOT has a guideline for assessing the value of a customer. The ratings are A-E and are defined by you as discussed below. This rating is shown many of the “Customer” related screens such as customer search, on the visual invoice and the customer’s statistics page as shown below.

Customer ratings are done on a store by store basis using defined parameters you will configure. You will rate the customers with a simple utility that can be run via scheduler at any time. Most users are ranking customers every week or on a bi-weekly basis. SBS chose to make this a manual/separate process rather than a real time update process because of the time and disk I/O required for these calculations.

Rating Customers
1- Navigate to the Home Page > Menu – F3 > General 1 of 4 > Customer Rating. You will display the screen below.

2- This screen allows you to select a range of customers that will be ranked. By selecting the “Select Customers” button on this screen you will be prompted for a date range as shown below. This date range will display all customers that have visited in the date range. Select the “OK” button to continue.
3. The next Screen as shown below will allow you to select what stores or route customers you would like to rank. If you select the “Select All” from the store list all customers will be ranked in all stores in the given date range you selected in the previous screen. After you select the store or routes you would like to include select the “OK” button to continue.

5. You will now display the customer ratings screen populated with customer data as shown below.
### Customer Ratings

<table>
<thead>
<tr>
<th>Rating</th>
<th>New</th>
<th>Name</th>
<th>ID</th>
<th>Address</th>
<th>Phone</th>
<th>Route</th>
<th>Call</th>
<th>Days</th>
<th>Signup</th>
<th>Last Visit</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Columns Explanation

- **Rating** – The “Current” rating of the customer as defined by the last time you ran the rating utility.
- **New** – The “New” rating of the customer as defined by this current run of the rating utility.
- **Name** – Customer name.
- **ID** – Customer ID.
- **Address** – Customer address.
- **Phone** – Customer Phone number.
- **Route** – Route associated with the customer.
- **Call**? – If the customer has not visited the store.
- **Days** – Customers route pickup and delivery days.
- **Signup** – The date the customers was created.
- **Last Visit** – Customers last visit date to either the store or via route pickup.

Review this list of customers and sort the screen by any column by double clicking on the column header that you would like to sort on. You are also shown the number of customers that been retrieved and will be rated by the “Red Retrieved” line at the bottom of the screen.

Notice the “Rating” and the “New” columns. The rating column display the current rating of the customer. The new rating is the rating the customer will have after you update and save this rating session.

6- Once you have reviewed this screen and want to update and complete the new rating for your customers select the “Update Rating” button. This will update all customers in the list.

7 - You will be prompted to make these permanent as shown below.
If you select Cancel the update will not occur and rating will not be changed.

8- Once the customers update is confirmed select the “Close” button to return the Home Page

**Configuration**

Configuration is done at the “Company” level.

1- Navigate to the Home Page > Program Configuration > Company Settings > Customer settings as shown below

2 – Select the “Customer Rating Settings” edit button to reveal the configuration of your ratings scale.
Notice the Weight and the A-E designations. This means that the current weight of the customers overall rating is based on a percentage of 100 for a final number. Currently you only have “Average Monthly Sales” to configure so this will be 100% of the weight. The A-E columns refer to the amount per month customer must spend on average over the selected date range to be an A-E customer. An example will be Janis Jones spends and average of $35 per month, she will be rated a “B” customer by the configuration shown above.

Once you make your changes to the weight and A-E values select the “OK” button and save your configuration and move on to the process of rating as discussed earlier in this chapter.
Purging Data

Overview
SPOT has a very large data structure and needs to be maintained from time to time. This utility will allow you to remove Invoices and Transaction logs along with setting customers that have not visited the store to inactive. This utility must be used with caution and only by those who understand the permanent ramification of purging data from your data base.

A backup should be run prior to the use of any of these utilities. This utility will make permanent changes to your data base and are not reversible without restoring a backup.

Customers
Due to detrimental reporting issues when deleting customers this utility does not actually purge/delete customer records from the data base. It only sets the customer to an “Inactive” status. Customer records are not physically removed from the data base because of many areas that reporting ties back to a customer record. If the customer is removed from the data base many reports currently used in SPOT would no longer function correctly. This utility will be setting customers specified to inactive allowing you to later activate a given customer. for use at a later time. Setting you customers to an inactive state allows many of your reports to return the proper current or active customers. An example would be the Top 10% of customers report. If you have 12,000 customers active in your data base you will see 1,200 customers. If you only have 4,000 of the 12,000 as active customers you will see 400 customers on this report. Marketing reports along with many other informational reports on customers report on just your “Active” status customers.

To use this utility you will navigate to the Home Pages F3-Menu > General > Purge Data. You will see the following screen.

Notice the warning text and a cutoff date. This is entered by default but can be overridden by you and will be used as the starting date of customers that have not visited prior to this date. The default is to disable customers that have had no activity in the past 13 months. This way you will by default keep the customers that have not visited your store in the last 12 months. This will only affect customer that have no cash credit balance, A/R balance, open orders, or are a master account with active sub accounts. Once the cutoff date is selected you will then select the “Inactivate Customers” button as noted on the screen. WARNING! Once this utility is run customers will be set to active and you will need to use customer maintenance to change the “Inactive” status to active one customer at a time.
Orders

Order purge will remove order information permanently from the database. If you use this utility to remove invoices they are permanently removed and will not be reportable. An example would be removing all orders prior to 6/30/02. If you attempt to run a report that include any order/invoice information prior to the cutoff date the report will return no records for these dates that have been purged.

This utility will DELETE all sold/voided orders before the specified cutoff date. WARNING: purging old orders will remove sales history information. It is recommended to keep at least 24 months of active data for reporting.

Cutoff Date: 06/30/02

Notice the warning text and a cutoff date. This is entered by default but can be overridden by you and will be used as the starting date of purging / deleting orders prior to this date. The default date used will remove data that is 25 months and older. This way you will by default keep orders for reporting up to 24 months. This utility does not remove activity log information for the orders. WARNING! Once this utility is run orders beyond the cutoff date will be deleted from the database. You will be required to restore the data base to recover these deleted records.

Activity Log

This utility will purge / delete Activity Log entries prior to the cutoff date specified. Activity logs are used in generating audit reports via the “Activity Log” utility. Orders, Order History and Order Reporting is not affected when removing activity log entries with this utility, only the use of the Activity Log reporting is affected.
Notice the warning text and a cutoff date. This is entered by default but can be overridden by you and will be used as the starting date of purging / deleting Activity Log entries prior to this date. The default date used is to delete data that is 13 months and older. This way you will by default keep activity log entries for reporting up to 12 months. This utility does not remove Order, Order history records. **WARNING!** Once this utility is run Activity Log entries beyond the cutoff date will be deleted from the data base. You will be required to restore the data base to recover these deleted records.
Lot Management

Overview
The Lot management feature or Lot Manager is a very powerful feature in SPOT that rarely gets used. Lot manager will allow you to see what is happening in production in a single screen, details with the click of mouse. In order to take advantage of Lot Manager you will be required to use some type of Lot control generated within SPOT. You can review open, closed and even assembled lots. You may review history or current lot activity with reports for tracking incomplete lots in assembly and report on any garment details that are keeping the lot from being assembled showing were they are in production.

Sample of Lot manager screen using standard invoice tracking.

Sample of Lot Manger screen using Standard Invoice tracking and Item Tracking and an Auto Assembly unit.
How to Use

This document assumes you are using some type of Lot system generated within SPOT. Please review the section in this document on Tagging and Lotting for more details on configuring your system to generate lots.

1. Navigate to the Home Page > Menu – F3 > General 1 of 4 > Lot Management. You will select the Lot Management button to reveal the following example screen.

2. You will notice 3 distinct sections on this screen. “Current Lots” displays all current lots that are in production. All lots will be displayed in this section until they are set to “Assembled”. At that time they will drop from this screen and be viewable with the search option. The columns in this section are used to view details at the lot level.

   Status – Status of the lot described on the line item. You have two available status items for a lot listed in lot management. They are

   Open – Lots are accepting additional orders and garments. An example of an open lot is a lot defined to have a maximum of 100 pieces and only 50 pieces are currently in the lot. The lot will maintained as Open until it either has the configured 100 pieces or it is manually closed by a production manager.

   Closed – The lot has hit its maximum pieces or the lot was closed manually by a production manager.

   Assembled – Once a lot has reached its maximum pieces or is closed by production all orders are then assembled during the production process and then it is set to a status of “Assembled”. After a lot has an “Assembled” status it is no longer displayed in the “Current Lots”. To view these “Assembled” lots use the “Search” function discussed later in this chapter.

   ![Lot Manager Example Screen](image-url)
Lot # - Lot number created by SPOT either automatically using internal lot generation logic or created manually by the production staff.

Label – This is the physical “Name” of the lot. Normally you will see the lot sponsor/profile and the color of the lot. “Standard – White” as shown in the example means the lot is generated from the “Standard” lot profile and the lot tags are “White”.

Date / Time – The date and time the lot was created

Orders – Number of current orders in the lot

Pieces – Number of current pieces in the lot

DET – Number of pieces currently in the Detail or In-Process status. This would be all items that are currently on your production floor that have not been assigned to Quality Control step or placed on an assisted / auto assembly conveyor.

RDY – Number of orders that have either passed a QC step and are on an assisted / auto assembly conveyor

Remaining – Number of garments still on the production floor. If you have multiple in process steps defined this will reflect all items in these multiple steps.

3. “Lot Detail” section of the screen gives you the details of the selected lot from the “Current Lots” screen. As per the example above lot 3 is selected showing the details of the lot in the “Lot Detail” screen. The following fields/columns are available and populated within the “Lot Detail” screen

Invoice # - Invoice number of the orders in the selected lot.

Item # / Promised – Promised date is on the first line of this column followed by the piece number of the items in the order. In the example above you have order 07-00002 that has 3 pieces. You can see the details of piece (1) 07-00002:1 etc.

Customer / Description – The first line for an invoice will be the customer’s name in bold, other lines in this column will be the descriptions of each garment on the order.

Status – The Status of the order is displayed if only invoice tracking is enabled. If Item Tracking is used you will see the status and location of each item associated with the order. An example with invoice tracking will be Detail, Ready or Sold. Examples at the item level will be Pressing, Spotting, On Conveyor, On assembly, On Rack.

Date / Time – The date and time the item was detailed and added to the lot.

Location – This is the current location for ready orders. You will see the rack location for the order if invoice tracking is used and you will see the location of the item if Item Tracking is used. Item tracking locations will be the location on the assembly or storage conveyor.

4. “Operation” selection section of the screen along with the selection of a lot in the “Current Lots” windows will allow you to review details of the selected lot in different ways and / or process the lot. The options available with each of these buttons are as follows.

Create – This is only used if you are using “Manually” created lots. Most installation will not use this option. This is used for those that have custom lot needs or are using a third party Itemtrac ID such as removable RFID chips, custom printed lot labels etc. If you use this feature you can customize the type and color of lot being created with the “Create” selection.

Close – The “Close” selection allows you to manually close a lot. The example for this is you have production set for 100 piece lots and it is 3:00 pm and the end of the production day and you do not want to wait end the lot with 50 pieces and not the configured 100 pieces. Closing the lot with this selection will force a new lot to be generated for the detailers in your operation. Logic will be followed for generating the next lot just as if the 100 piece lot had been completed. Use caution
**Assemble / Unassembled** – Once a lot has completed its life cycle in production and all orders are assembled in the lot and you have “0” displayed in the lots “Remaining” column you will use this selection to set the lots status to “Assembled”. Once a lot is set to “assembled” it will be removed from the “Current Lots” portion of the display. You may use the “Search” function to find these lots from previous days, weeks or months.

“Unassembled” is only active when you select a lot that has a status of “Assembled”. This allows you to show the lot as closed and view it on the “Current Lots” screen for monitoring.

**Search** – The search gives you the ability to search for all lots in a given date range. Lots that have both

**Order View** – After selecting an order or a specific item in an order from the “Lot Detail” screen this will display the “Order View” screen for the selected order. This allows you to review and modify items. You may choose to “Split” or “Redo” an item in the order to remove it from the order and the current lot.

**Incomplete** – By Default this is selected whenever you select a lot from the “Current Lots” screen. This selection will show only the items in-process for the lot selected. This allows you to view only items in production and that need to be tracked to complete the lot. Production managers will find this an invaluable option for tracking down the “few items” that are holding up the lot from being completed / assembled.

**All** – This will show “All” items for the selected lot in the “Current Lots” screen and you will now see all in-process, ready and sold status orders / items.

**Refresh** – Refreshes the “Current Lots” and “Lot Detail” screen with current lot information. This will update totals and the status of items / orders on the screen. Use refresh if you have the lot manager screen displayed for more than a couple of minutes.

**Print Detail** – Prints the current “Lot Detail” screen to your defined report printer.

**Exit** – Selecting this will close the Lot Manager and return you to the Home Page.
PPOH Reporting

Overview
PPOH reporting provides information for both the detail and assembly process. Setup is required to enable this feature and requires the use of the Spot Time Clock and Labor Categories. You may review reports by department or by labor category.

Configuration

Time Clock Settings
PPOH Category
Navigate to Setup > Company Settings > Time Clock Settings > PPOH Categories and create the required PPOH Categories. The categories will be associated with a labor category and used for report consolidation. Start small and work up to more complicated configurations.

1) Name: Enter the name of the PPOH Category
2) Abbreviation – Information displayed in reporting
3) Itemize In Labor Summary – Set to enabled.

Labor Category
Navigate to Setup > Company Settings > Time Clock Settings > Labor Categories and create required Categories. Labor categories are associated to a department group and use in calculating reports.

1) Name: Enter the name of the labor Category
2) PPOH Category: Select the Proper category from the available list.
Price Table / Department Group settings

Navigate to Setup > Company Settings > Mark-in Settings > Price Table > Department Groups and configure each department group you would like included in available reporting.

1) PPOH Category: Associate the proper PPOH category for this department from the drop down list.

Store > Time Clock Settings > Labor Category Settings

Navigate to Setup > Store Settings > Time Clock Settings > Labor Category Settings and assign the proper associations to a price table. This setting will associate a store’s labor categories back to a department group. Each store could have custom mappings.

1) Select a Price Table: Associate the correct Department Group to the store’s labor category.
**Reporting**

Navigate to Reports Gallery > Production. The following reports are available. The example below is based on the “Summary” report.

![](image)

### My DryCleaner

**PPOH Summary by Department Group - Markin**

<table>
<thead>
<tr>
<th>Department Grp</th>
<th>Time</th>
<th>Pieces</th>
<th>Value</th>
<th>PPOH</th>
</tr>
</thead>
<tbody>
<tr>
<td>DryCleaning</td>
<td>14:18</td>
<td>2</td>
<td>$18.00</td>
<td>0.140</td>
</tr>
<tr>
<td>Laundry</td>
<td>8:33</td>
<td>4</td>
<td>$23.96</td>
<td>0.168</td>
</tr>
<tr>
<td>HouseHold</td>
<td>0:00</td>
<td>0</td>
<td>$0.00</td>
<td>-</td>
</tr>
<tr>
<td>Store Total</td>
<td>22:51</td>
<td>6</td>
<td>$23.96</td>
<td>0.253</td>
</tr>
</tbody>
</table>

PPOH by Department Group - Detail
PPOH by Department Group - Assembly
PPOH by Labor Category - Detail
PPOH by Labor Category - Assembly

PPOH Summary by Department Group - Detail
PPOH Summary by Department Group - Assembly
PPOH Summary by Labor Category - Detail
PPOH Summary by Labor Category - Assembly
Labor Calculator

Overview
As your business produces pieces in production you need a quick and easy way of finding your current labor requirements and percentage of sales for the pieces produced. The labor calculator allows you to review past, current and future labor requirements and the amount of labor required. This number is derived by using pieces promised, hours worked and the cost of the average hour of labor. With these figures the labor calculator will allow you to keep a handle on profitability and maintain a steady and manageable percentage of labor in production.

How to Use
The labor calculator is found on the F3-Menu > General 3 of 4 > Labor Calculator. You will select the labor calculator to reveal the following screen.

![](image)

<table>
<thead>
<tr>
<th>Amount Promised</th>
<th>Mon 08-16</th>
<th>Tue 08-17</th>
<th>Wed 08-18</th>
<th>Thu 08-19</th>
<th>F/S 08-20-21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production Hours to Schedule</td>
<td>9.41</td>
<td>4.89</td>
<td>0.00</td>
<td>4.32</td>
<td>2.51</td>
</tr>
<tr>
<td>Actual Production Hours</td>
<td>6.00</td>
<td>6.00</td>
<td>0.00</td>
<td>5.00</td>
<td>4.00</td>
</tr>
<tr>
<td>Difference (by day)</td>
<td>-3.41</td>
<td>1.11</td>
<td>0.00</td>
<td>0.68</td>
<td>1.49</td>
</tr>
<tr>
<td>Cumulative Difference</td>
<td>-3.41</td>
<td>-2.30</td>
<td>-2.30</td>
<td>-1.62</td>
<td>-0.13</td>
</tr>
</tbody>
</table>

Amount Promised – Current “gross” dollars for the selected day/week’s promised orders. This field is updated with the “Retrieve Amounts” button.

Production Hours to Schedule – The amount of labor required to produce the currently retrieved production amounts using the formula (Amount Promised * Labor %) / Avg. Hourly Wage. The number calculated is the estimated hours required to produce the currently promised orders on a given day.

Actual Production Hours – these are hours that are actually used in your production facility and collected with the time clock. You will see these hours populated when you use the “retrieve amounts” button for hours collected with the time clock. Day’s that do not have numbers populated automatically may be manually added to complete your calculations.

Difference (by day) – The difference from the calculated production hours and the actual hours retrieved from the time clock.

Cumulative Difference – A running total showing the difference between the Weeks’s actual and estimated labor hours.

Labor % - This amount is the goal of percentage of labor you would like to achieve and will be used to calculate the difference by day. This number may be modified and recalculated at any time with the “calculate” button.

Avg. Hourly Wage - This is the average wage for your production staff and is an estimate based on your labor cost. This figure will be used in the calculation for percentage of sales by the hours needed to produce goods.
Print – Print the Results of the current data on the labor calculator screen

Retrieve Amounts – Updates the labor calculators “Amount Promised” fields with actual production promised for the week that is selected and loads the labor from the time clock.

Calculate – Calculates production hours and cost of production for comparison. You will use this after you have “Retrieved” labor and production amounts, populated your estimated percentage of labor cost and entered the average hourly wage rate.

Close – Exit the labor calculator and return to the Home Page

**Example Usage**

Calculate required production hours for a given production week.

1 - Select the “Retrieve Amounts” button and select the week you would like to calculate. This will retrieve pieces promised and with retrieve time generated from the time clock.

2 - Enter the projected “Labor %”

3 - Enter the “Average Hourly Wage”

4 - Select the “Calculate Button”

5 – You will now see the difference between the actual and estimated hours.

6 - Print the report for future records or sharing with the management staff.
Process Steps / Workflow Templates

Overview

Since the beginning we have designed SPOT to assist you in tracking orders by status and by location. Process steps are intended to be used by all users. You use the basic process steps day in and day out and you probably do not even know it. The four basic process steps are Quick, Detail, Ready and Pickup. Each of these steps in SPOT is a process step. These basic process steps are used track the location/status of an order. SPOT has a default configuration with these 4 process steps. The steps are applied to invoices at the Department Group level with a "Workflow Template". You may choose to use and modify the “Standard Workflow” template that ships with SPOT or you can create your own.

Process steps may be used to assign a status of an order or a location. Examples of Process Steps would be Quick, Detailed, Ready and Sold. Many reports assume that an invoice has one of these status types. You may modify any process status based logic in SPOT. We may allow any configuration but the configuration may not work. DO NOT modify the Quick, Detail, Ready or Sold process step in any way. If you make modification you may cause serious issues with the operation of your system.

Basic Uses

Racking

This is the same process you use with the rack process from the production tab. You have the same options when using the process step you just access via the process step button.

Quality Control / Bagging / Complete

This process step is usually used at the bagging point of production. Once the garments are assembled and packaged you then scan the order to the “QC” step and now have a history of the person who did final quality inspection for the order. This will allow you to track who is allowing the special comments on orders or items, broken buttons, missing garments to be passed to the customer without action. The process step will maintain an in process / detailed status but will now have a location as defined in the step. Reporting will now show the order in location “QC” as an example. You may now base production reporting and exception lists on this status.

To Store / From Store

This process is used for those production facilities that are centralized and distribute from a single location to many stores. The on truck status will indicate that orders are loaded on the delivery vehicle and will allow for tracking of the order. The clerk at the store can review invoice history and know if the order has been placed on the current delivery truck or not allowing up to the minute customer service without having to call the central production facility to track the order.

Advanced Uses

On Truck

This process is used for those production facilities that are either centralized or have routes in them. The on truck status will indicate that orders are loaded on the delivery vehicle. You may use this status to run exception reports for routes or for distribution to other stores. If you are using this option with routes you have the option to configure the process step to be a “Route” process and you will have reporting options to verify that all orders on the manifest have been loaded in the truck.
Outsource
This process step is usually configured to use an option called “Wholesaler” in configuration. You will enable the “wholesaler” option at the process step and then define a list of wholesalers you may use in your business. Examples would be your alterations vendor, leather vendor, shoe repair vendor etc. Each of these wholesalers would be defined and then at the time you scan orders to this process step SPOT will prompt for the wholesaler you are sending the order. This will allow you to see what orders are currently in the “Out Source” process step and the wholesaler you sent them to.

Assembly
A process step that will assist and confirm the proper assembly of items to the correct order. We call this “Assisted Assembly” and works with Item Track ID’s such as Heat Seal, RFID or bar-coded assembly tags.
SPOTScan

Overview
Only those elements of SPOTScan that apply to SPOT DryCleaning application functions are described below. Refer to the manufacturer’s manual for PDA functional use.

SPOTSCAN ELEMENTS

1 Scan Window
A built-in laser emits a red colored line used for targeting the barcode being scanned. Barcodes can be scanned reliably from a distance of 6-9 inches. NOTE: Permanent vision damage may occur if the activated laser light is pointed directly at the eye.

2 Scan Decode LED
Briefly glows green when a valid barcode has been scanned and decoded. An audible beep is also sounded in concurrence with this indicator.

3 Scan Trigger
The laser scanner is activated by pressing either of these trigger buttons.

4 Touch Screen Display
Provides a convenient method for selecting applications and responding to application prompts using either the finger or the attached stylus pen (found on the back of the unit).

5 Display Contrast
Provides access to the display contrast adjustment.

6 Power Button & Backlight Control
Turns the unit off/on and activates the touch screen backlight feature.

INSTALLED APPLICATIONS
SPOT Scan is shipped with Order Racking, Physical Inventory, Processing Steps, and Ready Orders Backup modules pre-installed. Future software modules can be ordered and installed separately. The alternate SPOTscanPC wireless terminal is designed to handle additional functions such as Electronic Route Manifest (ERM) and drive-thru windows. Contact SBS for portable scanner pricing and availability.

SPOTSCAN USE NOTES
- **SPOT Version Requirement**—The features discussed herein are supported on SPOT software version 3.50 and greater.
- **Power Up**—If power is turned off scanned data is not lost.
- **Batteries**—The unit runs on a Lithium Ion battery. A graphic battery life indicator appears in the top center of the active touch screen display. Battery life varies greatly with laser scanning use. Thousands of barcodes can be scanned before batteries require charging. The unit will stop functioning prior to total battery depletion. Place SPOT Scan in charger/docking bay when not in use.
- **Wrist Strap**—The unit is equipped with an elastic wrist strap to help secure the unit firmly in the hand during use.
- **Authorization Code**—Every SPOT related application requires a license in the form of an authorization code. The authorization code is also pre-installed in every new SPOTScan shipped. If the battery is removed for more than 60 seconds or allowed to completely discharge, the authorization code is lost requiring reauthorization and setup using the supplied CDROM.
- **Reset Button**—If the unit fails to function properly, pressing the Reset button can perform a nondestructive reset located next to the battery (a removed cover exposes this button).
**SPOT Setup**

In order to use SPOTScan, you must first configure SPOT software to recognize its existence. This is a fairly simple process; however, you must know which serial port your SPOTScan charger and docking base will be connected to. Use the following steps:

1. Select the **Setup** dropdown from the Home Page.
2. Select **Program Configuration > Workstation Settings > SPOTScan Settings**.
3. Enter port number “1” for com1: or “2” for com2:.
4. Select Baud Rate of 57,600 (must match SPOTScan setting as set up in **Menu > Store Preferences**).
5. Press the **Save** button to save and exit back to the Home Page.

**Application Installation Utility**

SPOTScan is normally shipped with application software pre-installed and a CDROM containing program loading utilities used to reinstall SBS applications from a computer if required. **Do not lose this CDROM.** These files are also contained on the SPOT Installation CDROM. DryCleaning applications and updates can be shipped on floppy disk or via the Internet as an alternative.

**SPOTScan Startup**

To activate the unit and prepare it for DryCleaning application use, perform the following steps:

1. Press power button.
2. Touch the SPOT logo appearing on the screen.
3. License and store number information is displayed.
4. DryCleaning applications buttons appear for selection.

If an application was active when power was turned off, that application is automatically selected when subsequently powered back on. Note that the unit will automatically power-down if no activity occurs for about two minutes—no data is lost if this happens.

**Touch Screen Display Elements**

1. **Function Selection Area**
   - SPOTScan functions and operations are selected and viewed.

2. **Home Button**
   - Exits back to main PDA selection view.

3. **Alpha Keyboard Button**
   - Displays an alphabetical keyboard for character entry with the stylus.

4. **Menu Button**
   - Displays a context sensitive dropdown configuration menu. The contents change with each selected function and is active only within the selected function. A user does not normally need these choices.

5. **Calculator Button**
   - Displays a calculator.

6. **Numeric Keypad Button**
   - Displays a numeric keypad for number entry with the stylus.

7. **Find Button**
   - Magnifies the keyboard as an aid to find small text. This button is rarely used with SPOTScan.

**Order Racking**

Using SPOTScan in the **Rack** mode allows orders to be racked to either a numbered conveyor or slick rail...
using almost any type of rail identification scheme imagined. Multiple units can be used for racking multiple orders. Note that the term slick rail implies any non-conveyor location such as shelf, route truck trolley, etc.

**Racking to a Numbered Conveyor**

Racking to a numbered conveyor requires two steps for each order: (1) scan the invoice number, then (2) scan the rack number (SBS provides compatible adhesive bar-coded conveyor link labels). SPOTScan has been specifically designed to prevent an out-of-sequence barcode scan by disabling the laser scanner from operating. For example, if you have accidentally scanned either the conveyor or invoice number out of sequence, the red laser will cease to operate until you acknowledge the error on the touch screen. This approach warns the user of a problem even if store noise levels prevent hearing the audible warning beep on the unit.

**Setup**
1. Select the **Rack** function
2. Toggle **Auto:** touch button to indicate “Off”

**Scanning**
1. Press either **Scan Trigger** to scan an invoice barcode
2. Press either **Scan Trigger** to scan the conveyor barcode
3. Repeat the process until all orders are racked

**Transferring**
1. Dock SPOTScan in the charger-docking base
2. From the Home Page press the **Rack** button
3. Press the **SPOTScan Sync** button in the **Rack** view
4. Press the **Start Sync** button from the dialog
5. Press the **Sync** button on SPOTScan touch screen
6. Data is then transferred to SPOT
7. Orders are automatically racked and displayed

**NOTE:** For **auto** Racking mode, press the “**Auto:**” button to display “**Auto:** On”. Racking mode remains in effect until changed.

**RACKING TO A SLICK RAIL**

Racking to a slick rail requires only one step for each order: (1) scan the invoice number. SPOT assigns the selected auto-Racking location type. For example, if you set up SPOT for auto-racking using the **first initial of the customer’s last name** for a customer named Bill Williams, SPOT automatically assigns a rack number of “W” for each racked order for Bill Williams.

**Setup**
1. Select the **Rack** function
2. Press the **Auto:** touch button to indicate “On”
3. The touch button below **Auto:** must show “<*Assign>”
4. If not, press <*Assign>, press **Clear**, press **Accept**

**Scanning**
1. Press either **Scan Trigger** to scan an invoice
2. Repeat the process until all orders are racked

**Transferring**
1. Dock SPOTScan in the charger-docking base
2. From the Home Page press the **Rack** button
3. Select **Auto-Assign** type
4. Press the **SPOTScan Sync** button in the **Rack** view
5. Press the **Start Sync** button from the dialog
6. Press the **Sync** button on SPOTScan touch screen
7. Data is then transferred to SPOT
Orders are automatically racked and displayed

**NOTE:** For **numeric** racking mode, press the “Auto:” button to display “Auto: Off”. Racking mode remains in effect until changed.

**Racking to a User Assignable Location**

This procedure is similar to the slick rail process above, but allows the user to identify the location on SPOTScan directly. SPOT will then automatically assign this specified identifier as the rack location during the transfer process. For example, enter the word “Route1” and rack numbers are logged in SPOT using this location identifier.

**Setup**

1. Select the **Rack** function
2. Press the **Auto:** touch button to indicate “On”
3. Press the **Assign** touch button
4. Enter or scan the rack assignment text, press **Accept**

**Scanning**

1. Press either **Scan Trigger** to scan an invoice
2. Repeat the process until all orders are racked

**Transferring**

1. Dock SPOTScan in the charger-docking base
2. From the Home Page press the **Rack** button
3. Press the **SPOTScan Sync** button in the **Rack** view
4. Press the **Start Sync** button from the dialog
5. Press the **Sync** button on SPOTScan touch screen
6. Data is then transferred to SPOT
7. Orders are automatically racked and displayed

**NOTE:** For **numeric** racking mode, press the “Auto:” button to display “Auto: Off”. Racking mode remains in effect until changed.

**Physical Inventory**

Using SPOTScan in the **Inventory** mode provides a way to conduct physical order inventories without cords or distance constraints. Multiple SPOTScan units can be used for inventorying large stores.

**Performing a Continuous Physical Inventory**

With a continuous inventory, you scan the barcode printed on each invoice from start to finish, transfer scanned barcode data, then allow SPOT to reconcile scanned physical inventory against its internal inventory status. SPOT’s physical inventory exception lists are then updated to reflect order status. An exception report can be printed.

**Setup**

1. Select the **Inventory** function

**Scanning**

1. Press either **Scan Trigger** to scan each invoice
2. Repeat the process until all orders are scanned

**Transferring**

1. Dock SPOTScan in the charger-docking base
2. From the Home Page press the **System** tab
3. From the **System** tab press the **Physical Inventory** button
4. Press the **Scan Inventory** button
5. Press the **SPOTScan Sync** button
Performing an Intermittent Physical Inventory

With an intermittent inventory, you scan each bar-coded invoice in intervals (interrupted to assist customers), transfer scanned barcode data, and allow SPOT to reconcile scanned physical inventory against its internal inventory. To do this, do not reset the Physical Inventory session when prompted from SPOT.

Performing an Inventory with Location Scan

The Normal mode discussed above captures inventory without requiring conveyor location information. There are two additional modes available that compare orders to assigned conveyor locations. The advantage to performing an inventory with location checking is identifying misfiled conveyor orders. The inventory mode is changed by pressing the Normal button, cycling through each of the three modes:

- Normal—No locations are captured.
- Rack Each—Capture locations by scanning each invoice/rack location pair in a similar fashion to the racking function.
- Rack Multi—Capture locations by first scanning a location and then each invoice at the same location. Scanning a new location causes all subsequent invoice scans to be paired with that new location. This mode is useful when multiple orders are assigned to a single conveyor link rather than individual link slots.

Transferring data in this mode is similar to the Normal inventory function, except that prior to selecting SPOTScan Sync, the Do Not Expect Scanned Locations (in the upper right corner) must be selected to indicate Expect Scanned Locations.

Processing Steps

Processing step scanning is similar to the order Racking function and scans orders through one or more user-definable processing steps.

Processing Steps View

The major elements of this view are as follows:

- Current Selection—Listed at top (title bar) of the view. The currently selected store’s mnemonic is displayed in parenthesis.
- Upload Button—Select to upload all scans into SPOT.
- Step Select Button—Select to choose a step. Disappears when items are scanned and waiting for upload.
- Scan Invoice Field—Cursor flashes here when the scanner is waiting for an invoice scan.
- Scan Location Field—Currently not supported in SPOT.
- Ok Button—Used to accept a manually entered invoice number.

Setup

1 Select the Processing Steps function.
2 Press the Step Select button.
3 Highlight the desired step, press Accept.
4 If prompted, highlight the desired store and press Accept.

Scanning

1 Press either Scan Trigger to scan an invoice.
2 Repeat the process for each order in the selected step.

NOTE: The system will remove the Step Select button with the first scan, and will reinstate this button after a successful upload. This means that orders for only one step at a time may be processed between
Transferring
1 Dock SPOT Scan in the charger-docking base.
2 From the Home Page press the Process Steps button.
3 Select the correct step (must exactly match the selected step in SPOT Scan).
4 Press the Start Sync button from the dialog.
5 Press the Sync button on SPOT Scan touch screen.
6 Data is then transferred to SPOT.
7 Orders are automatically racked and displayed.

Changing the Active Step and Store
The Step Select view is invoked when the Step Select button is pressed. The Store Select view is invoked when a process step is selected that prompts for the store mnemonic (see Adding a New Step).

Navigating Step and Store Select Views
In some instances, the number of user-defined process steps to select may grow too large to list in a single view. When this happens, the user may scroll through the items by using the arrow buttons located in the lower right corner of the view. The action taken each time an arrow key is pressed is determined by the button immediately to the left of the arrows. The default selection is Page.

- Press the Page button, and the button will change to Line.
- Press the Line button, and it will change to Move. This is a special mode, and is discussed later under the section Rearranging Steps.

Step Select View
The major elements of this view are as follows:

- List of Steps—Shows the name of the step, the store mnemonic if specified for the step, and the step abbreviation.
- Accept Button—Accepts the currently highlighted step, and returns to the scan view.
- Cancel Button—Returns to the scan view with no changes.
- Page Button—Selects the Up/Down arrow mode:
  - Page—Arrows page up/down through the step list.
  - Line—Arrows move the highlight up or down one line.
  - Move—Arrows move the highlighted step up/down one selection.
- Arrow Buttons—Used for navigation through multiple views.

Store Select View
The controls on this view are identical to the Step Select view. The major elements of this view are as follows:

- List of Stores—Shows the name of the store and store abbreviation.
- Accept Button—Accepts the currently highlighted store, and returns to the scan view.
- Cancel Button—Returns to the scan view with no changes.
- Page Button—Selects the Up/Down arrow mode:
  - Page—Arrows page up/down through the store list.
  - Line—Arrows move the highlight up or down one line.
  - Move—Arrows move the highlighted store up/down one selection.
- Arrow Buttons—Used for navigation through multiple views.

Add/Modify/Remove Steps
The operator may add, modify or remove steps. Make sure the system is at the Process Steps scanning view, and that there are no orders waiting to upload.

1 Press the Step Select button
2 Highlight the desired step (except for New Entry)
3 Press the Menu button
Adding a New Step
Select New Entry, and the user is presented with a form to fill out for the following fields:

- **Description**—Name of the step. **NOTE:** This must be identical to the scan step as identified in SPOT, including case and spacing. If this is not accomplished, the upload will fail. Test each new step with a single scan and upload.
- **Abbreviation**—This shows on the view with each scan, to indicate which scan step is selected.
- **Mnemonic Check**—Select from *Orig* or *Dest.* Each SPOT barcode encodes the originating store, and also the destination store (if an order is dropped off at one store, and must be picked up at another). This selection determines which is to be validated.
- **Store Mnemonic**—Select from *Any*, *Store*, *Step*, or *Prompt.*
  - *Any*—SPOT Scan will not validate the store, but will allow SPOT to perform this validation.
  - *Store*—SPOT Scan will validate the step against the Mnemonic established in the “Store Preferences” section.
  - *Step*—The store mnemonic to validate will be specified in the subsequent field.
  - *Prompt*—SPOT Scan will prompt the user for the store upon selection of the step.
- **Allow Location Scan**—Future.
- **Accept**—Accepts the input and returns to the scan step selection view.
- **Cancel**— Cancels any changes and returns to the scan step selection view.

**NOTE:** New steps are always placed at the bottom of the list. Please refer to the section below titled Rearranging Steps.

Modifying an Existing Step
- Select Edit Entry, the user is presented with the same form as above, with the information filled in for the highlighted step.

Remove an Existing Step
- Select Delete Entry, the user is presented with a confirmation: “Are You Sure?” Select Yes or No.

Rearrange Steps
This mode is used to rearrange steps, so the user can easily place the most often used steps at the top of the list, or put entries in the list in alphabetical order. Once the mode is set to *Move*, pressing the arrow keys moves the highlighted step either up or down in the list.

A step at the top of the list will not wrap to the bottom of the list with the next attempted move, and vice-versa. The system will permanently remember the new order once the list is exited. Note that pressing *Cancel* will not restore the previous list order.

- Press the *Page or Line* button until the caption changes to *Move*.

Add/Modify/Remove Stores
The operator may add, modify or remove stores. Make sure the system is at the *Processing Steps* scanning view, and that there are no orders waiting to upload.

1. Press the *Step Select* button.
2. Select a step that prompts for a store.
3. Highlight the desired store (except for *New Entry*).
4. Press the *Menu* button.
5. Select the desired action (*New Entry*, *Edit Entry*, or *Delete Entry*).

**Adding a New Store**
Select *New Entry*, and the user is presented with a form to fill out for the following fields:

- **Description**—Store name/number for operator reference.
• **Mnemonic**—This is the mnemonic (encoded in each SPOT barcode) that will be validated when orders are scanned.

  *NOTE: New stores are always placed at the bottom of the list. Please refer to the section below titled Rearranging Stores.*

**Modifying an Existing Store**

- Select *Edit Entry*, the user is presented with the same form as above, with the information filled in for the highlighted store.

**Remove an Existing Store**

- Select *Delete Entry*, the user will be presented with a confirmation: “Are You Sure?” Select *Yes* or *No*.

**Rearrange Stores**

This mode is used to rearrange stores, so the user can easily place the most often used store at the top of the list, or put entries in the list in alphabetical order. Once the mode is set to *Move*, pressing the arrow keys moves the highlighted store either up or down in the list.

  A store at the top of the list will not wrap to the bottom of the list with the next attempted move, and vice-versa. The system will permanently remember the new order once the list is exited. Note that pressing *Cancel* will not restore the previous list order.

- Press the *Page* or *Line* button until the caption changes to *Move*.

**Ready Orders Backup**

SPOT and SPOTScan together provide a backup storage and retrieval function for orders racked to a conveyor. In the event of a computer failure or loss of power, racked order locations can be looked up from SPOTScan by customer name or phone number. The *Ready Order* backup process should be performed each evening during the nightly shutdown procedure or after all orders have been racked to ensure that the list of ready orders is current.

  Note that this feature has special password protection as specified in the SPOT setup screen for the SPOTScan device (this is not a PIN). Password protection prevents unauthorized clerk access to rack locations to enhance cash controls. Once the correct password is given, the function is unlocked until a new data transfer refreshes the ready order data (and password) or the function is explicitly locked by a user. If a password is not specified, the password entry is not required.

**Transferring the Ready Orders List**

Before this SPOTScan function can be used to find orders, all ready orders must be transferred from SPOT to SPOTScan. Note that this transfer is generally much larger than the typical transfer for Physical Inventory or Racking, taking a proportionately greater amount of time.

  The ability to transfer ready orders to SPOTScan is not PIN protected and is conveniently accessed from either the *Password Entry* view or the *Ready Orders–Customers List* view (on SPOTScan). Transferring data is straightforward to encourage daily ready order backing up. The corresponding SPOTScan *Backup* button in the SPOT Rack view facilitates ready order backup when all racking for the day is completed.

**Setup**

1. Select the *Ready List* function.
2. If the *Password Entry* view is displayed, select *Sync* from the *Password Entry View*.
3. If the *Ready Orders–Customers* view is presented, select *Sync* from the *Ready Orders–Customers View*.

**Transfer from Password Entry View**

1. Dock SPOTScan in the charger-docking base.
2. From the *Home Page* press the *Rack* button.
3. Press the SPOTScan *Backup* button in the Rack view.
4. Press the *Start Sync* button from the dialog.
5. Press the *Sync* button on SPOTScan touch screen.
6. Data is then transferred to SPOTScan.
Transfer from Ready Orders – Customers View
1 Dock SPOT Scan in the charger-docking base.
2 From the Home Page press the Rack button.
3 Press the SPOT Scan Backup button in the Rack view.
4 Press the Start Sync button from the dialog.
5 Press the Menu button on lower left corner of SPOT Scan screen.
6 Select the Sync Order Data option.
7 Data is then transferred to SPOT Scan.
8 If a password is specified, SPOT Scan will display the Password Entry view.

Using the Ready Orders List
Once SPOT Scan contains the list of all ready orders and their locations, it can be used to find these orders in case the computer system in the store is down for any reason.

Orders are looked up on SPOT Scan by customer and are listed either by name or phone (as specified in the SPOT settings for SPOT Scan). The customer sort sequence specified by SPOT always places the primary lookup type in the left column. For example, if customers are to be accessed by name, customer names will be listed in the left-most column sorted alphabetically in ascending order (last name first) with phone numbers in the column to the right. Likewise, if customers are to be accessed by phone number, customer phone numbers will be listed in the left-most column in numerically ascending order with customer names in the column to the right.

The third column to the right never changes position and is the number of orders to be picked up for the selected customer. A dash (-) in this column indicates that no orders remain to be picked up, while a plus sign (+) indicates 10 or more orders exist.

Setup
1 Select the Ready List function.
2 If a password is specified, the Password Entry view is displayed.
3 Enter the password and press the OK button.

Picking Up Orders
1 Highlight the desired customer (use the up/down arrow buttons).
2 Press the Select button.
3 SPOT Scan will display all Ready Orders for that customer, with location, piece count, and price.
4 Scan each order being picked up (use the Select button to manually mark orders).
5 SPOT Scan marks each ready order being picked up with an asterisk (*) with the total amount displayed on the lower part of the screen.
6 When finished, press the Done button.

Finding Customers Quickly
Customer lookup is determined by the type of data in the left-most column. If the customer name is in this column then lookup must be by customer name (last name first). If the customer phone is in this column, then lookup must be by phone number. When looking up a customer by name, it is best to enter only the first few letters of the last name. When looking up a customer by phone use only the standard seven-digit number (as if for a local call–do not enter the area code).

Customer Lookup
1 From the Ready Orders–Customers view, press the Search button.
2 Enter the first few characters of the customer’s last name or phone number.
3 Press the Accept button.
4 SPOT Scan will return to the customer list with the closest match highlighted.
Time Clock Management

Overview

Time clock management will allow you to review and modify a clerk’s time clock information including the date and times of punch in / out and department they worked. Currently clocked in users are also specified on this list. The list is has security setting to view, manage and to view all stores user information.

You are also able to see the total hours a user has for a given time period and current users that are clocked in to the system. Any modification to time in / out, departments worked are able to be modified and will prompt for reason for the modification to the entries and are tracked in reporting and in the activity log. Most reports will show both the reason for the modifications and the original entries the modifications had.

How to Use

Navigate to the Home Page > Menu – F3 > General (1of 4) > Time Clock Management and select. You will display the following screen displaying the current stores users as shown below.

You have several fields and options on this screen. They are as follows.

“Users” section displays the users with the user’s home / assigned store number sorted by last name. If you have access to view the “All Stores” user list you will see all users sorted by last name.

“Pay Period” or the date range option in this view that is just below the users list allows you to scroll from pay period to pay period and view time for users during the selected pay period. Use the “-” to move back pay periods or use the “+” to move ahead in pay periods.

“Time Clock Detail” displays the current detailed time in / out information for the selected the user. You have the option to modify these fields if you have security access to do so.

“Total Elapsed” time listed just below the “Time Clock Detail” is the elapsed time for the selected user.

“Current Store” is selected by default and will allow you to view only the users located in the store you are logged in to.

“All Stores” is available if you have security access to view all users in all stores.
“Add Entry” is used to create a new entry for the clerk. You will be prompted for a Date In / Out and a Time In / Out. The Elapsed time for the entry will be calculated at the time the entry is completed. An example of new entries are as follows.

Missed Punch In - A user forgot to punch in for the day. The starting will be added using the correct date and time the user started there shift.

Vacation Pay – Enter a clerk’s normal hours by day for vacation pay assigning the Category as Vacation Pay.

Sick Pay – Enter a clerk’s normal hours by day for sick pay assigning the Category as Sick Pay.

“Remove Entry” is used to remove a complete line item and is permanent. Please this feature with caution. If you remove an entry on accident you will need to use the “Add Entry” and recreate the deleted information.

“Close” will prompt to save any changes made to a record and will return you to the Home Page.

“Save changes” is used if you have made changes to a record and want to save them. You may change as many records for a clerk as needed and they are not saved until you either select this option or you confirm saving the changes when the “Close” button is selected.

**Configuration**

Navigate to the Home Page > Setup > Program Configuration > Company Settings > Time Clock Settings and select the “Time Clock Edit Reasons”. By default you have several reasons that you will be prompted with at the time of the time clock modification. You may create as many Time clock Edit Reasons as required for your tracking purposes. You have defaults with the system of Missed Punch, Vacation and Incorrect Time.
Time Clock Configuration

Overview
Time clock usage can be tailored to your company's needs. You may just need to collect employee time by day or pay period, you may want to gather regular time and then calculate overtime for the day or the week. Other may want to use “Categories” of labor to track the cost of each category or departments labor burden. Many of the configuration options mentioned below will affect the employee’s use of time clock and others will affect the reporting of time clock information.

How to configure options
Most settings for time clock are available by navigating to Navigate to the Home Page > Setup > Program Configuration > Company Settings > Time Clock Settings. You will find several options for time clock operations.

![Time Clock Settings](image)

Time Clock Settings as shown above will be used for the entire company and will affect all users of the time clock functionality as noted below.

Company Settings / Time Clock Settings
Time Clock Setting - Pay Period Setup – Before any time clock information can be gathered you must first create pay periods. You have the option of creating pay periods one by one or by using the pay period wizard to assist you in creating pay periods. The periods may be based on a single week, 2 weeks, bi-monthly periods etc.

Use Labor Categories – Enable this feature if you are tracking the hours worked in particular category or department within your company. This feature will require your employees to not only clock in but to also select a predefined list of labor categories or departments at the time they login. These categories can be used for reporting of PPH and labor burdens for given categories or departments. This predefined list can be configured using the “Labor Categories” list as discussed later in this chapter.

Page Break After Each Employee – Enabling this feature will force a page break after every employee in reporting. Enable this if you would like each employee pay information on a separate page.
Workweek Start Day – This is the day of the week your workweek starts and is used for calculating overtime hours. If your work week starts on Wednesday SPOT will calculate overtime using Wednesday to Wednesday.

Labor Categories - Create the required labor categories that an employee will have access to selecting if you have enable the “Use Labor Categories” option as explained previously in this chapter. These categories are assigned to “Departments” at the store level as noted later in this chapter. Defaults of DryCleaning, Laundry, QC, Bagging, Spotting and maintenance have been included in every default install of SPOT.

Time Clock Edit Reasons - List of available options for managers to choose when an employee’s time clock is being edited. Defaults of Missed punch, Vacation and Wrong time have all been created as defaults.

**Store Settings / Time Clock Settings**

Overtime Cut off Time – Day - Number of hours worked in a day by an employee that will contribute to the calculation of overtime hours. If your state requires overtime for any time over an 8 hour shift you will place 8 hours in this field.

Overtime Cut off Time – Week - Number of hours worked in a work week starting with the “Workweek Start Day”. Any hours after this configured number will contribute to the calculation of overtime. If your state requires overtime pay for more than 40 hours per week you will place 40 hours per week in this field.

Labor Category Settings - This allows you to associate a “Labor Category” with a price tables “Department” if you are tracking labor categories. You will select a price table and then associate the departments in the price table to your defined labor categories. This association will be used in reporting and calculations of pieces per hour in reporting in a later version of SPOT.

Display Clocked in Users on Exit - Enabling this feature will display all Clocked-In users at the store at the time you exit SPOT. This is usually enabled on the stations at the front counter to inform clerks / managers of employees that are still clocked in. This will help with the amount of time clock management needed for clerks that forget to punch out.

Allow Clock-In From This Workstation - Enabling this feature will allow any employee to use this station to clock-in or out. You may have a single machine that is used for time clock and then restrict all other stations from being used for clock-in or out functionality.

**Workstation Settings / Employee Settings**

Print Time Clock Receipts - Enable this feature if you would like every employee to receive a receipt from SPOT at the time they either clock-in or out. This can be used to keep employees from complaining that the time they clock-in or out is not the correct time as reflected in reporting. This will generate a receipt to your receipt printer by default and is active for all employees at the store this feature is enabled.

**User / Activity Settings**

Force Clock-In - Enable this feature per user to force the employee to clock into SPOT before they can use the system. If a clerk has this enabled and is not clocked-in they will be warned when they attempt to use any functions in SPOT that they are not currently clocked-in.
Detail / Markin Advanced Options

Overview
You have many configuration options that will control the way your Detail operations operate. These settings are advanced setting and will require knowledge of the SPOT configuration tool.

Tailwinds Tagging Interface
If you are using the Tailwinds tagging system in your operation you now have the ability to automatically assign your tag numbers by color and quantity of items on an order. This option will save time and be more accurate at the time of detail and tagging.

Configuration
This feature will require Company and Store settings to be modified. Follow these steps to configure your system to automatically assign Tailwinds tag information at detail. You have the ability to set the tag pattern used in your Tailwinds system at the Price Table / Department, Store or Route. The Department level setting will override both the store and route configuration setting.

Company Settings
Navigate to Company Settings > Tagging settings and set your “Assisted Tag Mode” to “Enabled” and “Assisted Tag Mode Tag Mask” to @TAILWIND as shown below.

![Configuration Settings](image)

Navigate to Company Settings > Tagging Settings > Tag Colors and Create the tag colors by name and order as shown below. If you do not use this color list and the order as shown your assisted tagging will not function properly. Each color corresponds with the number provided by Tailwinds, 0 = White, 1 = Red, 2 = Purple etc.
Navigate to Company Settings > Tagging Settings > Tag Patterns and Create the tag patterns you are currently using in your operation. Update both the Name and the Abbreviation fields with the pattern name.

Navigate to Store Settings > Mark In Settings > Department Settings > Price Table and add the Tag Mask @TAILWINDS for each department you will be using the tag Tailwind tagging system.
You will now configure Default Tag Patterns. You have the option to select this by Department in a Price Table, at the Store level or Route level. Just a reminder that the Route setting will override the Store setting and the Price table setting overrides the Store and Route settings.

Store Settings - Navigate to Store Settings > Tagging Settings > Default Tag Pattern to the required pattern for the store.

Route Settings - Navigate to Store Settings > Route Settings > Route > Default Tag Pattern. Set this to the required pattern for the selected Route. This setting will override the Store Setting > Tagging Settings.
Optional Department Settings – Navigate to Company Settings > Markin Settings > Price Table > Department Group > Default Tag Pattern. If you set this Department level setting it will override the Store and Route settings for the Default Tag Pattern.

**Using Tailwind Tagging**

Once your settings are complete you will be prompted the first order that you detail to supply the tag number for the order.

Once you have supplied the tag number SPOT takes care of the rest. It will auto populate the proper number of tags for the order and the additional “Bracket” tags needed by the Tailwind system. Notice that the tag numbers and color are set, in this case the 6525 or “5” set the color to Grey. It has also associated the proper tag pattern as configured.
Once you have entered the tag numbers for the first order of the detail session SPOT will remember and auto populate the proper number, color and patterns of subsequent orders. This auto populate will work until you exit SPOT.

**Central Markin / Detailing**

The “Central Markin/Detailing” feature allows you to consolidate your operations markin/detailing process to a central location. This means you have the ability to detail at your central plant for all stores. This will provide your operation with a dedicated staff for detailing garments for consistent sorting, quality control, pricing, tagging etc.

Central markin may also be used if you have configured your routes in separate stores or if you have several stores/entities configured for reporting reasons. Central Markin will give you an easy way to detail orders without having to use the File > Logoff feature.

**Example 1**

You operate 5 drop stores and a central plant; you want to use quick receives at the drop stores. You want to send all the Quick received invoices and garment to the plant for detailing. This will remove the detailing labor and computers from the drop stores and bring all of your detailing to the central plant.

**Example 2**

You have a single plant with routes, counter and restoration running from your facilities. Each of these entities is configured as a separate store in SPOT. You may want to enable central markin so that you do not have to use the Logoff/Login feature when you are detailing. With Central Markin enabled you will no longer need to use the login/logoff feature as you are using it now.

**Configuration**

Navigate to Store Settings > Mark In Settings > Use Central Markin and enable the feature.
You will configure Central Markin at the store you want Central Markin logic to be used. In most cases this is only at the central plant and not at the drop stores.

Usage

Central Markin requires your detailers to select a store at the time of the detail session. This example shows that we are going to detail for Store #1 using the store configuration. When selecting a store or route you will inherit any invoice numbers, price table, loting, and tagging configurations defined by that store or route. This allows maximum flexibility for tagging of garments. Once an order is detailed it will return you to the search screen for easy customer lookup.

Once you are logged in to a store you will detail orders as you always have. When you are ready to login to a different store or route you will use the “Log In” button on the search screen. You can see in the example below that you are logged in to Store #1. By selecting the “Log In” button on the search screen you can select another store or route for detailing.
Suggestions

- When using Central Markin you will want to detail orders grouped by store or route as much as possible.
- The default search logic used will allow you to only search for those customers assigned to the store you have selected.
- Verify at the time of detailing you are working in the correct store. Any orders detailed in central markin will be assigned to the store currently logged in.
- Enable this feature in the stores requiring the Central Markin logic and not all of your stores.

User Interface Options

Overview

SPOT has 4 separate detail/markin screen options available for use. These settings may be set at the store level or at the clerk level. These different detail/markin screens allow you to tailor the detail process to each clerk in your operation. These different screens will allow a clerk to use a keyboards 10 key pad, a mouse or touch screen or a combination of both. You have 4 options to configure as follows

Standard – This option allows the usage of either a mouse, touch screen or your 10-key pad on the keyboard for navigation to all department, category, item, descriptors and Upcharge lists. This is the latest screen added to the configuration. It has been created as a screen that all users are able to use. Those that want touch screen or mouse and those that would like to use the keyboard. This screen has navigation available to assist all user types and allows for more modifiers on a single list than any other detail / mark-in screen.

Touch Screen - Extended – This is the default in the software. This option allows the usage of your mouse or touch screen for navigation to all department, category, item, descriptors and Upcharge lists.

Touch Screen – Single Screen – This option allows the usage of your mouse or touch screen for navigation to all department, category, item, descriptors and Upcharge lists all on a single screen and is the original detail/markin screen used in SPOT. This screen does not have support for some of the latest development like HSL/ScanTrac or advanced Lotting and at some point will be retired from the system. We do not suggest you use this option.

Keyboard - This option allows the usage of your 10-key pad on the keyboard for navigation to all department, category, item, descriptors and Upcharge lists. This screen does not have support for some of the latest development like HSL/ScanTrac or advanced Lotting.
As you can see you have several options to customize the detail process by clerk for a true custom solution to clerk preference. Experiment with your clerks and see what they like the best. You will find your PPH increase at the detail/markin counter with these customization options.

**Navigation Options**

Each screen has unique navigation sequences. They are as follows

**Standard** – Navigation with the keyboard method are simple. You will use the 10 key pad on the keyboard and each keyboard selection will move you to the next available selection list.

Simple Navigation - The current list box is highlighted with a “Green” background. Selection of a number on the keypad to a corresponding item or the selection of an item with your mouse or touch screen will select the item and forward to the next list box.

Move back one list box – Press the “*” from while on the department, category or items list or use the “Backspace” key to return to the previous list box if you are on the modifiers screen.

Move forward a list box – Either press the number of the item you select or use the “Enter” key to move forward a list with no selection from the list. This is only available for modifier and Upcharge lists and not department, category or item lists. Using the enter key on these lists will select the currently selected item and move you forward to the next list.

Move back to Department list box – If you are on the modifiers screen you may use the “*” to return to the Department list box.

Multiple select lists - If you have any of your modifier lists configured for multi select you will be required to select the items in the list and then press enter.

You also have a configuration option for requiring modifiers or the default of optionally adding modifier and Upcharge details. This setting is accessed by navigating to the Home Page > Program Configuration > Workstation Settings > Markin Settings > Markin Detail Mode > Selecting these options will allow you to allow the workstation to gather just Department, Category and item details for fast semi detailed front counter operations or full detail at the detail / markin station.

**Keyboard** – Navigation with the keyboard method are simple. You will use the 10 key pad on the keyboard and each keyboard selection will move you to the next available selection list.

Simple Navigation - The current list box is highlighted with a “Blue” background. Selection of a number on the keypad corresponding to any on the list will select that item and move you forward to the next list box.

Move back one list box – Press the “Backspace” key to return to the previous screen.

Move forward a list box – Either press the number of the item you select or use the “Enter” key to move forward a list with no selection from the list. This is only available for modifier and Upcharge lists and not department, category or item lists. Using the enter key on these lists will select the currently selected item and move you forward to the next list.

Move back to Department list box – If you need to return to the Department list you will just press the “*” key.

Multiple select lists - If you have any of your modifier lists configured for multi select you will be required to select the items in the list and then press enter.

**Configuration**

**Store Settings**
You may define the “Store Defaults” detail / Markin method by navigating to the Home Page > Setup > Application Configuration > Store Settings > Markin Settings > Default Mark-in Method. By selecting a method from the drop down you will enable your selection as the store defaults detail/mark-in method.

Workstation Setting
You also have a configuration option for requiring modifiers or the default of optionally adding modifier and Upcharge details. This setting is accessed by navigating to the Home Page > Program Configuration > Workstation Settings > Markin Settings > Markin Detail Mode > Selecting these options will allow you to allow the workstation to gather just Department, Category and item details for fast semi detailed front counter operations or full detail at the detail / markin station.

Clerk Settings
At the Clerk level you may define the preferred method used for detail / mark-in and it will over ride the store default as defined in the previous paragraph. By default all clerks are configured to “Use Site Default”. You have the option to configure or override the store default by navigating to the Home Page > Setup > Users , Groups and rights > Users > Select User > Activity Settings > User Settings > Markin Method > Select the preferred detail / mark-in screen to be used by the selected user.

You will be required to exit SPOT to load the new user settings and configuration change before the user will be able to use the new setting.
Pickup / Cashier / Cash Drawer Options

Overview
Pickup and Cashier options will illustrate several options you have when using the “Pickup” process. These options include the use of multiple cash drawers, pick list printing and order selection options.

Cash Drawer Options
SPOT has four different configuration options to support cash drawers. The use of cash drawers can assist in cash control in your operation. This use of multiple cash drawers will increase the control of cash and add to the work required in your cash control. The work comes from counting drawers and tracking the reporting that goes along with the drawer details. Many folks like the idea of one drawer and quick and easy drawer checkin and checkouts. You will make changes for cash drawer association at the store level. You may configure cash drawer association by navigating to the Home Screen> Setup> Program Configuration> Store Settings> Cash Drawer Association. The following are uses and configuration options.

Workstation – Allows only a single drawer per workstation that is shared by all users on the workstation. This configuration allows for simplified cash control with a single drawer per workstation. This configuration allowed all users on the system to use any drawer on any station and cash control is limited.

Workstation & Single Cashier – Limits the use of a cash drawer to a single cashier per workstation. This is the beginnings of strong cash control. This configuration will require a clerk to use his/her drawer and to be responsible for the funds in and out of the drawer. The clerk may have a single drawer on a single station or a drawer on multiple stations. The typical configuration is a single drawer per clerk tied to a single workstation. This workstation is the only station that will be used for pickup by this clerk.

Single Cashier – This is a setting that is used by stores that have a roaming cash drawer configuration. A roaming cash drawer may be an apron worn by the clerk, a bank of drawers centrally located in the store that is opened and closed with a key manually. This configuration allows a clerk to move from workstation to workstation, car hopping or work the drive thru and still maintain cash control in a single drawer. This option is used when implementing the “Central Cashier” option of pickup described later in this chapter.

Single Drawer – This is the lazy way to cash control. This allows for a single drawer at checkin / checkout that will be used by all users on the system. This makes it simple and easy to counting and balancing drawers for multiple clerks on multiple stations. This option opens you up to clerk theft because there is a single drawer with all clerks in and out.

These options are available and are configurable at any time. Before you make any changes to your current cash drawer configurations you will need to make sure all drawers are checked out before you make these changes. If you do not checkout all cash drawer session information and it will require SBS supports assistance to fix this problem and will render your system pickup process unusable.

Central Cashier
Central cashiering is a change in the thought process of customer order pickup. The intent and design of this feature is to allow a single workstation or multiple workstations to act as a “Central Cashier” in your operation. The central cashier station will allow queued customer pickup sessions to be displayed and processed. These pickup sessions are queued using either our SPOTscanPC or SPOTLink device. These devices are used in drive thru or car hop operations. The SPOTscanPC is a mobile device that travels with the clerk and the SPOTLink is a wall/cart mounted device that is usually stationary and located in or near the drive thru area. Either device has a customer lookup option and a “pickup” process that will queue the customers ready orders to the central cashier station or stations. Once the pickup session is queued from the remote device he clerk will then retrieve the orders and service the customer at the car via the apron on their belt. This allows the cash out of the orders at a later time with the central cashier console as shown below.

Using Central Cashiering
The idea of central cashier is that all clerks are either using an apron or a roaming/central cash drawer assigned to them (single cashier option as described earlier in this chapter) and the sessions are queued from a remote device or location. To configure the setting you will navigate to Home Page > Setup > Program Configuration > Company Settings > Cashier Settings > Central Cashier to associate all workstation to use this option or you can use Workstation Settings > Cashier Settings > Central Cashier Mode. The workstation setting will allow you to dedicate a single workstation to the central cashier mode of operation, the company version of this setting will force all stations to be central cashier stations.

Once you have made setting changes to enable central cashiering for the workstation you will be presented with the following dialog at the time you enter “Pickup”.

![Central Cashier Control](image)

Notice you have several options on this screen.

- **Add Cashier Session** – Select a customer that will have a pickup session added to central cashier queue.
- **Remove Cashier Session** – Removes a session from the central cashier control panel
- **Exit Central Cashier Control** – Exits the control and returns you back to the home screen
- **Selecting a Session** – This will take you to the pickup screen prompting for the proper orders and tender to complete a pickup session.

Below you will see a sample of the central cashier control screen with three queued pickup sessions.
Notice the queued sessions have a name, time stamp and initials of the clerk that created the session. The time stamp will show you how long the session has been in the queue. If you have a busy drive thru you may be able to use the time stamp to see who has been waiting the longest for service. Let's suppose you have queued sessions from the drive thru and printed the pick list, pulled the orders and delivered them to the customer's vehicle and received payment for the orders at the car. As time allows you will then return to the central cashier screen and select that customers session using the pick list from your apron as guide to what needs to be completed, select this customers session from this list and continue the cash out of orders for the customer as you normally do. (remember this may happen minutes or hours after the session has been queued)

You have now completed the process and usage of Central Cashiering. This is used in very specific cases and takes a bit of getting used to the cash control aspect of this feature.

**Forced Scan Order Pickup**

**Pick List**

Pick list printing is available at to assist clerks to gather the orders for a customer at pickup. A pick list can be automatically generated at the time of entering the order pickup screen. You have two options for printing the pick list. You can print the list automatically or you can print it with the "Pick List" button on the order pickup screen. These lists can be configured by navigating to the Home Screen> Setup> Program Configuration> Workstation Settings> Report Settings> Printer Assignments> Pick List - Auto or Pick List – Pickup.

**Pick List – Auto** will print at the time you enter the order pickup screen and is dependent on the setting at Company Settings> Cashier Settings> Print Picklist Threshold. It is suggested to have this set to 2. This means that the "Auto" Picklist will print if the customer has 2 or more orders ready for pickup. You may choose to print this list at any threshold. The idea with the pick list is to assist in gathering and remembering what orders a customer has available for pickup. By default this will print all ready orders from the pickup screen and may be configured with the template editor to include ready, detailed or overdue orders.

**Pick List – Pickup** will print at the time the button is selected. By default this will print any selected order from the pickup screen and may be configured with the template editor to include ready, detailed or overdue orders.
RouteTrac Manager
Located in SPOT and available from the Home Page navigate to F3-Menu > General > RouteTrac. You have an interface in SPOT that will display all of the information that has been scanned by the route driver with the RouteTrac device.

As seen in the picture below the top section of the display will show you the individual routes that have been run. Each time a driver starts and stops a route you will see a summary line. If you select a summary line you will see the details for the route in the bottom section of the screen. This will include all deliveries, pickups and any other exceptions for the route. Anything in Red is indicating that something is incorrect with the action. In the sample below you will see orders that have been delivered to the wrong customer along with the customers that had pickups that have not had an order detailed.

Along with showing the details you have several options for displaying detailed data by selecting the option buttons at the bottom of this screen.

Search – Allows you to search for items scanned in a given date range, enter a specific order number, customer ID or invoice number. You may also select to show just pickups, deliveries or both.

Customer – Open the selected customers profile page

Order/Visit – Display the current order along with the orders in the associated visit
**Active Only** – Display the active routes drivers are working on. This means if the route has been started it will display. Any route that has been ended will not display with this button selected.

**All** – Display any active or completed routes.

**Refresh** – Updates the screen to include any scans that have been completed since the screen was opened.

**Print Detail** – Print the detail / bottom section of this screen to your report printer.
Credit Card Processing

Overview
Credit card processing is becoming the choice of payment for many customers. We have created several specific settings to enhance the use of credit cards.

Configuration
These settings will allow you to tailor credit card processing functionality to your operation. These settings can be found at Company Settings > Credit Card Settings > Credit Card Profile.

![Program Configuration]

Disable Declined CCOF – Defines the option to “Disable” a customer’s CCOF if a transaction returns specific decline codes. These are codes returned from the processor that SPOT will apply “Disable” logic on a CCOF card. It is suggested that you remove the checkmark from all of these reason codes so that a customer’s card will not be disabled for future CCOF transactions.

- **Referral** - If the Merchant receives a Voice Authorized Required or Referral response, the Merchant must call the voice center to retrieve a verbal authorization or decline, or request a different card.

- **Duplicate** - Declined card due to the transaction already happening (same date, amount, customer, address, etc). Declining makes sense or else the customer will be charged more than expected.

- **Cancel** - They would get this code when a card is declined because the owner has canceled the card because it is no longer to be used or has been stolen

- **Capture** – The processor is requesting you to “Capture” the card from the customer. Please contact PayPros for more information on this return code.

- **Other** – Reasons other than those listed above.

Notes: You have additional options to configure codes specifically returned from PayPros. These Settings are not required and do not need to be present. Company Settings > Credit Card Settings > Decline Codes.

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Verify Address – This setting should be enabled on all of your credit card profiles. Enabling address verification will enhance the data being sent to the processor during a CCOF transaction. Enabling will send the customers address on file along with the CCOF transaction. Assuming the address on file matches the billing address on the card being used will provide address verification for the transaction. In some cases this may reduce the transaction cost.

Note: If a customer has a billing address defined the address will be passed to the processor for address verification. If the customer does not have a billing address the default address will be used for verification.

Best Practices to Obtain the Best Rates

- Process cards with the credit card swipe for the best possible “Qualified” rate.
- If you are using credit card on file make sure you collect the customer’s credit card billing address. This address can be associated with either the customer or billing address. If the billing address is supplied it will be used for transaction address verification. Please make sure you have the “Verify Address” setting enabled on your credit card profile.
- If you are using credit card on file look at processing credit cards once a week. This will reduce the number of transactions and transaction fees for a customer.
- If you are using credit card on file and charging at detail or rack use the credit batch functionality and process your batch once per day. Batching will ensure the customer will have a single transaction for the day and not a single transaction for each order detailed or racked.
- Use your PayPros reporting console and your monthly statements to verify the quantity of qualified and non-qualified transactions you are processing. We have several instances that all transactions in a store are being processed at none qualified rates.
  - Verify that all swipes being used at stores are working properly
  - Verify that all swipes are passing the proper track data to provide qualified swipe transaction data.
- Contact PayPros and request an annual account review. Depending on your credit card transaction profile and usage you may be eligible for a better rate.
Gift Card Manager

Overview
Gift card processing was introduced to allow the processing and tracking of gift cards to your customers. In the past many customers have used cash credits, gift certificates, punch cards etc to track a balance for a customer. A gift card allows you to supply a card with a random value and then track the use of the value among a single or multiple users of a card.

Gift cards also provide the use of a professional marketing piece that can be used as marketing give away or as a true gift card for a customer to purchase. Customers have found the tracking of the nontraditional gift card usages such as charity, trade work and other uses have dramatically reduced the time and energy needed to track these types of transactions.

Configuring Gift Cards
It is suggested that just like your credit card processing you will have a valid merchant ID for each store. This allows accurate reporting for stores sales and redemption of cards. You have the option of using a single merchant ID for all stores but this is not recommended.

Configuration will require an account, physical cards, merchant ID’s, user name, password, URL and port all provided by Givex. Once you have this information you will proceed to Company Settings > Gift Card Settings and create a profile for each user name and password making sure you name the profile to reflect the store name or number.

Givex Configuration

Once the profile information is entered you will then need to apply a profile to the store level. Using the settings as noted below at Store Settings > Gift Card Settings you will select the profile for the active store.
**Tender types**

A “Tender Type” by the name of “Gift Card” will need to be setup in order to process a payment via gift card from order pickup. You will use the Company Settings > Invoice Settings > Tender Types and create a “Gift Card” tender type. Use the following example to configure your settings. Using any settings other than those shown below will cause issues in your processing of payments using gift cards.

![Properties for 'Gift Card']

**Security**

SPOT has a number of security settings that will limit or allow your staff to process gift cards. These security settings can be found under Setup > User Groups and Rights > Activity Rights > Cashier. The following are available to allow or limit gift card functionality.

- [ ] Use Gift Card Activate Only
- [ ] Use Gift Card Adjustments
- [ ] Use Gift Card Manager Screen
- [ ] Use Gift Card Reports
- [ ] Use Gift Card Sell and Activate

**Using Gift Cards**

Once you have configured gift cards you are now ready to use gift cards as a tender type. The process for using gift cards will require the activation of a card. Cards can be activated with or without the customer paying for the card. Many companies will sell a gift card for $25, They will collect the $25 for the card and then activate the card for a balance of $25. Other companies will use the gift cards as a true gift for customers without collecting money for the card. Either way a card will be required to be activated with a usable balance. Once the card has a valid balance it can be used in Spot at order pickup as a valid tender type.

**Sell and Activate a Card**

Used to activate a new card, apply a balance to the card that you will be collecting funds from the customer for the balance.

1. Proceed to the “Menu – F3” option from the home screen.
2. Select the “Gift Card Manager” from the “Payments” 2 of 2 menu. You will be provided with the following screen. Select the “Sell and Activate Card” button.

3. Use the “Select Customer” button and select the correct customer.

4. Swipe the gift card in the card reader, scan the barcode from the card or manually enter the card number in the card number field.

5. Enter the amount of the gift card the customer is purchasing.

6. Select the “Execute” button on the screen to process the gift card with the card processor and process payment within Spot.

7. You will prompt for a tender type and payment amount when activating this card.

**Activating a Card**

Used to activate a new card, apply a balance to the card that you are not intending to collect funds from the customer for the balance.

1. Proceed to the “Menu – F3” option from the home screen.
2. Select the “Gift Card Manager” from the “Payments” 2 of 2 menu. You will be provided with the following screen. Select the “Activate Card” button.
3. Swipe the gift card in the card reader, scan the barcode from the card or manually enter the card number in the card number field.
4. Enter the amount of the gift card you would like to activate for the customer.
5. Select the “Execute” button on the screen to process the gift card with the card processor and activate this card with the assigned balance.

**Balance Inquiry**

Used to inquire a balance of a currently activated gift card

Via Web site

You may use [www.Givex.com](http://www.Givex.com) and enter your card number for a current card. Another option you may choose to use an integrated link from your web site. This gives your customers easy access to a card's current balance from your web site. This link will need to be configured and implemented on your website with information provided by Givex.

Via Spot

1. Proceed to the "Menu – F3" option from the home screen.
2. Select the “Gift Card Manager” from the “Payments” menu. You will be provided with the following screen. Select the “Balance Inquiry” button as shown below.

3. Swipe the gift card in the card reader, scan the barcode from the card or manually enter the card number in the card number field and press execute to find the current balance on the card.

**Sell / Increment Balance**

Used to increment an active card's balance and collect funds for the incremented amount.

1. Proceed to the "Menu – F3" option from the home screen.
2. Select the “Gift Card Manager” from the “Payments” 2 of 2 menu. You will be provided with the following screen. Select the “Sell and Activate Card” button.
3. Use the “Select Customer” button and select the correct customer.
4. Swipe the gift card in the card reader, scan the barcode from the card or manually enter the card number in the card number field.
5. Enter the amount of the gift card the customer is purchasing.
6. Select the “Execute” button on the screen to process the gift card with the card processor and process payment within Spot.
7. You will be prompted for a tender type and payment amount when activating this card.

**Adjustment Card Balance**

Use this option to adjust an active gift card balance with a positive or negative amount. Payment from the customer for the specified amount will not be collected or returned to the customer and just the card balance on the gift card network will be modified.

1. Proceed to the “Menu – F3” option from the home screen.
2. Select the “Gift Card Manager” from the “Payments” 2 of 2 menu. You will be provided with the following screen. Select the “Adjust” button as shown below.

3. Swipe the gift card in the card reader, scan the barcode from the card or manually enter the card number in the card number field and press execute to find the current balance on the card.
Void/Cancel transaction
This feature is used to reverse a transaction on the gift card processing network. This type of a transaction will require the transaction number from the gift card processor and will not modify a SPOT transaction.

1. Process to the “Menu – F3” option from the home screen.
2. Select the “Gift Card Manager” from the “Payments” 2 of 2 menu. You will be provided with the following screen. Select the “Void / Cancel Transaction” button as shown below.

3. Swipe the gift card in the card reader, scan the barcode from the card or manually enter the card number in the card number field and press execute to find the current balance on the card.
4. Enter the amount you would like to void or cancel
5. Enter the transaction ID of the transaction to be processed. This transaction ID can be found in reports for gift cards or on the receipt printed with the original transaction
6. Enter comments for the reason of the void / cancelation
7. Press the Execute button.

Cashout
Used to total the last batch of gift cards that have been processed since the Cashout process was last run. This is only used for reporting and is not needed to operate SPOT. The report prints to the receipt printer.

1. Process to the “Menu – F3” option from the home screen.
2. Select the “Gift Card Manager” from the “Payments” 2 of 2 menu. You will be provided with the following screen. Select the “Cashout” button as shown below.
3. Press the Execute button

**Reports**

This function is used to process reports specific to the Givex Cashout process.

1. Process to the “Menu – F3” option from the home screen.
2. Select the “Gift Card Manager” from the “Payments” menu. You will be provided with the following screen. Select the “Reports” button as shown below.
3. Provide either a Cashout report ID or leave blank as noted on the screen.
4. Press the “Execute button” to perform the report process.
<table>
<thead>
<tr>
<th>Date</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>10/11/2010</td>
<td>Added Document History page</td>
</tr>
<tr>
<td>10/12/2010</td>
<td>Updated Orphaned Garment</td>
</tr>
<tr>
<td>11/12/2010</td>
<td>Updated Orphaned Garment, Promotions, Gift Card</td>
</tr>
<tr>
<td>11/22/2010</td>
<td>Updated Issue Manager, reduced all image sizes and rearranged Index</td>
</tr>
<tr>
<td>11/23/2010</td>
<td>Updated Security, Updated misc screen shots, reformatted layout reduced by 6 pages</td>
</tr>
<tr>
<td>12/7/2010</td>
<td>Removed Gift Card exceptions</td>
</tr>
<tr>
<td>12/7/2010</td>
<td>Updated requirements and verbiage on invoice and HSL imports</td>
</tr>
<tr>
<td>12/9/2010</td>
<td>Updated Assisted Assembly</td>
</tr>
<tr>
<td>3/28/2011</td>
<td>Added new Email tokens</td>
</tr>
<tr>
<td>6/22/2011</td>
<td>Added new Email tokens that support invoice details</td>
</tr>
<tr>
<td>6/22/2011</td>
<td>Updated assisted assembly and detail</td>
</tr>
<tr>
<td>6/22/2011</td>
<td>Updated examples used in Marketing</td>
</tr>
<tr>
<td>6/27/2011</td>
<td>Updated explanation and logic used in “out of pattern reports”</td>
</tr>
<tr>
<td>8/23/2011</td>
<td>Updated Gift Card</td>
</tr>
<tr>
<td>8/25/2011</td>
<td>Updated New Email Tokens</td>
</tr>
<tr>
<td>9/30/2011</td>
<td>Updated List of tokens to remove duplicates</td>
</tr>
<tr>
<td>10/17/2011</td>
<td>Update Marketing incentives</td>
</tr>
<tr>
<td>10/27/2011</td>
<td>Updates to Frequent buyer</td>
</tr>
<tr>
<td>1/12/2012</td>
<td>Updates to coupons</td>
</tr>
<tr>
<td>2/9/2012</td>
<td>Updates to reports</td>
</tr>
<tr>
<td>2/27/2012</td>
<td>Added New Restoration Customer Logic</td>
</tr>
<tr>
<td>2/29/2012</td>
<td>Updated Email / SMTP information</td>
</tr>
<tr>
<td>5/17/2012</td>
<td>Updated Email Token list</td>
</tr>
<tr>
<td>8/2/2012</td>
<td>Updated “Assisted Assembly”</td>
</tr>
<tr>
<td>8/10/2012</td>
<td>Updated SPOTmap logic and tool usage</td>
</tr>
<tr>
<td>8/22/2012</td>
<td>Updated Production Commitment configuration</td>
</tr>
<tr>
<td>9/14/2012</td>
<td>Updated route operations</td>
</tr>
<tr>
<td>10/3/2012</td>
<td>Added Customer Referral Program</td>
</tr>
<tr>
<td>10/3/2012</td>
<td>Added “Best Practices” in credit card processing</td>
</tr>
<tr>
<td>3/4/2013</td>
<td>Updated new email tokens</td>
</tr>
<tr>
<td>3/4/2013</td>
<td>Updated new import fields</td>
</tr>
<tr>
<td>5/28/2014</td>
<td>Added Importing Groupon and other serialized coupon and tracking</td>
</tr>
<tr>
<td>6/4/2014</td>
<td>Updated email token list</td>
</tr>
<tr>
<td>8/29/2014</td>
<td>Added “Alert Group” configuration and logic</td>
</tr>
<tr>
<td>1/16/2015</td>
<td>Added “PPOH” reporting and configuration documentation</td>
</tr>
<tr>
<td>3/9/2014</td>
<td>Added CREDITCARDCOMMON TOKEN import field</td>
</tr>
<tr>
<td>9/18/2015</td>
<td>Added “Price Table Import” import fields</td>
</tr>
<tr>
<td>1/18/2016</td>
<td>Added “Price Table Import” import fields</td>
</tr>
</tbody>
</table>