QuickFill® for Windows

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Welcome to QuickFill!

QuickFill is an advanced subscription fulfillment system designed for ease of use, speed, and flexibility. Because it takes full advantage of the extraordinary power of today's personal computers, it gives you capabilities previously available only on far more expensive large-scale systems.

We've designed QuickFill with particular attention to "controls," flexibility, ease of use, and speed. Let's take a quick look at each of these characteristics.

Controls

QuickFill validates and double-checks nearly all the data you enter. It begins by making sure that all standard data items you enter are correct. For example, it checks that zip codes match the correct states and Canadian province codes, that U.S. state abbreviations and Canadian province codes are accurate, and that you made numeric or alphanumeric entries in the right places. In addition to these standard data checks, QuickFill also tries to ensure that all the data you enter is logical. For example:

Say you try to define a “billing series” with 72 days between successive billing efforts. Since 72 days is an unusually long time to wait between bills, QuickFill asks if you really meant to enter such a large number. If you say you did, QuickFill accepts the number. However, if you really intended to specify 27 days, you can fix your error immediately. You don’t have to wait four weeks to correct it—after, that is, you notice the “missing” bills.

Here are a few more examples. QuickFill also warns you if you:

- Try to refund an amount greater than the total that a customer has paid.
- Try to enter a payment on a paid order.
- Try to enter the same order or renewal twice.

In addition, through its “batch” entry method, QuickFill double-checks that the dollar totals for your critical new order, payment, and renewal entries are correct.
Introduction

These and many more “fail-safe” systems reflect the knowledge of publishing practices and procedures that have been built into QuickFill.

**Flexibility**

When you begin to use QuickFill, you specify all the policies and practices of your business by filling out a series of “screen forms.” QuickFill then uses that information to implement your policies. Altering a policy is as simple as returning to the appropriate screen form and changing an entry.

You can specify separate policies for different companies and different publications. You can also specify separate billing and renewal policies. You’re not restricted to one set of policies for all your publications or even for all the subscribers to one publication. For example, you can instruct QuickFill to bill and renew your longtime subscribers, newer subscribers, gift subscribers, or even subscribers you obtained from a particular promotion in entirely different ways.

QuickFill’s flexibility extends to its reporting system. You can pinpoint exactly what information you want to include in a report before you run it. For example, you can run a payment rate report for all orders or for just those orders you received during a particular time period. You can also get more detailed data by looking at payment rates by list, mailing package, offer, and many other variables—or combinations of these variables. The decision is up to you.

**Ease of use**

A well-thought out menu structure, pop-up windows for questions and reminders, and a truly comprehensive help system and documentation make using QuickFill seem like second nature.

Moreover, there are no cryptic commands to remember. You can, for instance, select certain groups of subscribers from one publication for a cross-promotion to another publication just by filling in a few blanks on the ‘Promotional Labels’ report screen. And you’ll find the same ease of use no matter what you want to accomplish with QuickFill.

**Speed**

Written specifically for the Windows 32-bit environment, QuickFill takes full advantage of the tremendous power available in today’s personal computers while being faithful to our design requirements for tight controls. The only way to truly appreciate this combination of features is to see QuickFill in action; you will have the opportunity to do so in chapter 3, *Tour of QuickFill*.

**Organization of this manual**

We know you’re eager to get your QuickFill system up and running. Before you get started, however, we want to give you a few guidelines for navigating through the QuickFill manual.
Introduction

First things first. We strongly suggest that you work through the QuickFill Demonstration Tour; we hope you will do so after you finish this introduction. Trust us. You’ll become proficient in using QuickFill a good deal faster if you work through the demo first. (Besides, it’s fun.) You will find instructions for beginning the Tour under “Getting started” on p. xiii below.

The QuickFill User’s Guide and Reference Manual along with the extensive built-in help system provide a complete reference to the QuickFill system.

Here’s a brief outline of the manual’s fourteen chapters and seven appendices.

Chapter 1. INSTALLATION

This chapter contains complete instructions for installing QuickFill on your computer.

Chapter 2. BASICS

In this chapter, we describe QuickFill’s “main menu.” We also tell you how to fill out “screen forms” and work with the keyboard.

Chapter 3. TOUR OF QUICKFILL

This chapter contains a guided tour of QuickFill. It uses the demonstration database that came with your QuickFill system to show you how to get into QuickFill and to navigate the menu as well as how to set your publication policies, enter new orders, payments, and renewals; and how to create issue labels. We conclude by showing you two of the many reports that are available in QuickFill.

Chapter 4. AUDIT SYSTEM BASICS

In this chapter, we provide an overview of QuickFill’s audit system as well as procedures for maintaining the data required for an audit.

Chapter 5. AUDIT TOUR OF QUICKFILL

This is the guided tour of QuickFill’s audit system. Here we show you how to define your qualification form, enter controlled subscriptions, enter renewals and requalifications; and how to create issue labels. We conclude by showing you three of the many audit reports that are available in QuickFill.

Chapter 6. FILE COMMANDS

In this chapter, we describe commands to back up and restore your database without having to leave QuickFill, as well as a utility that checks the integrity of the database.
Chapter 7. TRANSACTIONS

QuickFill provides more than 20 “transactions,” which are described in the built-in help system. In this chapter, we provide an overview of the ‘Lookup’ transaction, as it is the starting point for a number of the other transactions. In addition, this chapter provides detailed information on transaction batches.

Chapter 8. DEFINITIONS

Chapter 8 gives you an overview of the definitions you’ll use in order to tailor QuickFill to the needs of your business. Take time to read this chapter carefully.

Chapter 9. UPDATES

QuickFill gives you a menu of “updates.” Among other functions, the updates let you bill and renew customers, produce issue labels, and record refunds.

Chapter 10. REPORTS

In chapter 10, we first explain the different types of reports you can get with QuickFill. Then we tell you how to print, look at, or delete these reports.

We also explain how you fill out “screen filters” to get just the reports you want.

Chapter 11. ACCOUNTING

In this chapter, we tell you how QuickFill handles your subscription-related accounting.

Chapter 12. OTHER COMMANDS

Here we describe commands that you can use to import and export subscriber data.

Chapter 13. JOBS

This chapter provides a detailed discussion of how to save and re-use your filter selections for reports, updates, and other jobs.

Chapter 14. PRINTING

In chapter 14, we discuss printer settings for reports, labels, bills, and renewal notices.

Appendix A. CREATING A PUBLICATION

This appendix provides you with a checklist that you can use to “define” your publication(s).
Appendix B. WORKFLOWS

In Workflows, we give you some tips for creating a daily QuickFill work schedule and for developing operating procedures.

Appendix C. FORM SAMPLES

This appendix contains samples of the forms QuickFill uses for bills and renewal notices. We explain how QuickFill prints on these forms and tell you how to obtain them.

Appendix D. MAIL MERGE

In this appendix, you’ll see how to set up, produce, and use the special “mail-merge” files QuickFill can produce. You can use these files to create mail-merge bills and renewal notices. You can also use them to make special mailings to selected groups of customers.

Appendix E. POSTAL PRESORT & QUICKFILL LABEL PROCESSOR

This appendix explains how to produce postal presort files for your labels and how to use the QuickFill label processor.

Appendix F. QUICKFILL & ODBC

In this appendix, we provide an overview of QuickFill & ODBC as well as a detailed listing of the tables that may be accessed.

Appendix G. QUICKFILL INTERNET EXTENSIONS

This appendix contains an overview of the QuickFill Internet Extensions service and the items on the ‘Internet’ menu.

Getting started

The best way to learn QuickFill is for you to work through the Demonstration Tour as outlined below. When you’re done, you should have a fairly accurate idea of what it would be like to use QuickFill with your own data.

Then, to get the most out of this manual—and QuickFill—we suggest you read chapters 3 through 9. (If you do not have the audit system, you can skip chapters 4 and 5.) You’ll find it helpful to look at the demo screens while you’re reading. Also, it may make sense for you to review chapter 11, Accounting, with your accountant or financial adviser.

You’ll find the material covered by the demo system easy to digest. First, we have you read a short section on a specific QuickFill function. Then you’ll try out the function by following simple step-by-step instructions. As you move through the demo, you’ll also see QuickFill “screens” that we identify and explain as we go along. It’s easy and it’s fun.
Introduction

The tour of the demo system is organized into the following sections:

Chapter 1  
Installation  
Follow the Single User Installation Instructions found in Chapter 1, Installation.

Chapter 2  
Basics  
All you need to know for navigating your way through QuickFill, including: main menu details, working with screen forms, understanding function keys, and working with “linked lists.”

Chapter 3  
Tour of QuickFill  
An overview of QuickFill’s design and a summary of the contents of the demo database. This chapter also contains a practice session with a sampling of transactions, updates, and reports and a wrap-up of your tour of QuickFill.

Once you’ve completed this guided tour, we encourage you to continue exploring QuickFill. Many of the functions that we don’t cover in the Tour work very much like the ones we do cover. We hope you’ll experiment with all of them. If you have any questions, just call CWC Software at 1-800-762-7702 (International 781-843-2010). Our fax number is 781-843-8365. You can reach us Monday through Friday between 10:00 a.m. and 5:00 p.m. (Eastern Standard Time). You can also send e-mail to techsupport@cwcsoftware.com.

Once you have become familiar with how QuickFill works and you want to get started customizing it to the needs of your own business, just run through the checklist in appendix A, Creating a Publication, to get started.

We hope you’ll enjoy working with your QuickFill system.
Chapter 1

Installation

- Single-user installation
- Multiuser installation
- Startup problems
- Backing up the system
Installation

Single-user installation

These instructions are for installing the single-user version of QuickFill. If you have purchased a multiuser version of QuickFill, you should instead read the section on multiuser installation on p. 1.10 and then return to this section.

Before installing the QuickFill subscription fulfillment system your computer should have:

- Windows 2000 Professional or Server, Windows XP, Windows Server 2003 or Windows Vista;
- a video card and monitor capable of at least 800x600 resolution;
- about 2.0 megabytes of available hard disk space for each 1,000 subscribers in your database. However, as time goes on and you accumulate historical data on your customers, you will need more bytes per subscriber.

To find out how much disk storage you have available, open “My Computer” (or just “Computer” on Windows Vista) and select the drive that you want to put QuickFill on. When you do this, the free disk space for that drive will be displayed at the bottom of the window. You can also find this information by right clicking on the drive and viewing the properties for the drive.

You may have leased or purchased QuickFill or bought a demonstration system or a starter kit.

If you’ve leased QuickFill, the expiration date of your lease is based on the anniversary date of your lease agreement. Beginning 30 days before the expiration date, you will receive a warning to renew your lease every time you start QuickFill. When you renew the lease, CWC Software provides you with a code that you can use to reset the expiration date. If you ignore the warning, and the expiration date passes, QuickFill will still run and you’ll still be able to enter transactions. But you won’t be able to produce issue labels, bills, renewal notices, or perform certain other options.

If you’ve purchased QuickFill it will, of course, run indefinitely.
Installation

Single-user installation

The starter kit is purchased but has an expiration date that CWC will extend annually. The starter kit is also limited to working with a database containing a single publication and a maximum of 3,000 customers.

The demonstration system carries no expiration date. However, you can enter a maximum of 200 customers. In all other respects, the demonstration system works just like the complete QuickFill system.

Sharing QuickFill

Even though you may have purchased a single-user license for QuickFill you can still share the software with other users. One copy of QuickFill can be shared by Adam, who does the daily data entry, Betty, who does the accounting, and Charlie who does the circulation management as long as only one person is working at a time.

To install QuickFill for shared use it is best that you install the program files on one computer and then provide access to those program files from the other computers. That will make things easier when you receive a new version of QuickFill—all you have to do is install the new CD on the same computer where you performed the original installation—the other computers do not need to be updated.

Installing the software

Place the QuickFill CD in your CD drive—it should auto start. If, after a minute or so, the installation screen has not appeared then click on the Start button, select “My Computer” (or just “Computer” on Windows Vista), browse to the CD drive and double click the QuickFillInstall file. Now follow the screen prompts.

The installer will propose that the QuickFill program files be installed to a folder named Qfw on your C drive. This is the normal choice, but you can elect to install the program files to another drive or folder if you wish.

When it is finished, the installer will probably ask you to restart the computer.

Sharing the program folder

You can skip this step if you will be the sole user of QuickFill.

If you are using a “Home” version of Windows Vista please call technical support for special instructions on sharing the QuickFill program files with other users on your network. The following instructions assume you have a “Professional” or “Business” version of Windows.

Open “My Computer” (or just “Computer” on Windows Vista) and locate the folder where you installed the QuickFill program. Right click on the folder and choose “Sharing and Security...” from the menu that appears. Click “Share this folder.” It will propose a share name that matches the folder name—use this name.

User’s Guide 1.3
Installation

Single-user installation

If you see a check box labeled “Allow network users to change my files” check that box and click OK.

If instead you have a “Permissions” button then click that button. Select the group named “Everyone” at the top, check the box for “Allow” and “Full control” on the bottom, then click OK.

Branding your copy of QuickFill

Branding QuickFill puts into effect the license options that you purchased. If you do not perform this step QuickFill will operate as a demonstration version. You will be limited to the entry of no more than 200 customer records.

Click on the Start button, select Programs and then QuickFill. Now select ‘Brand QuickFill’. Enter the branding code that was sent to you and click ‘OK’.

Workstation setup

You can skip this step if you will be the sole user of QuickFill.

From each additional computer that will use QuickFill open “My Network Places” (or just “Network” on Windows Vista), locate the computer where QuickFill was installed and browse to the Workstation folder within the QuickFill program folder. Double click the WorkstationInstall file. When it is finished, the installer will probably ask you to restart the workstation.

The workstation installer creates shortcuts to the QuickFill program files that reside on the primary computer. It also installs the component used for creating Excel reports from QuickFill report files and the registry entries needed for ODBC access to the QuickFill database. In most cases, when you install newer versions of QuickFill you will not need to rerun the workstation installer. If we make a change that requires that the workstation installer be rerun we will notify you in the memo that accompanies the upgrade CD.

Database setup

Finally, it’s time to start QuickFill. Click on the Start button, select Programs, QuickFill and QuickFill.

Once QuickFill has started, go to the file menu and create your main database by selecting “New database.” We recommend that your database name not include spaces—it will work but it will make life difficult in some situations.

As an alternative to starting with a blank database you can use the demonstration databases that we provide. The installation program creates two icons on your desktop named “QuickFill Demo Database” and “QuickFill Audit Demo Database”. These demonstration databases are intended for you to play with. You can try all of the transactions and reports to see how they work. Do not be afraid of messing things up. If you ever want to start over with a clean database, you can do so by restoring the original database to the appropriate folder. (See “Demonstration databases” below for details.)
Installation

Single-user installation

Once you’ve created your main database, you’re ready to begin defining your publication policies. However, before beginning to do this, you should go through chapter 3, *Tour of QuickFill* (also available by clicking on the TOURS.PDF icon on your desktop) and appendix A, *Creating a Publication*, of this manual.

Printer setup

If you are going to use a laser or ink-jet printer that uses sheet-fed paper, or if you will be printing letter size (8.5” x 11”) bills or renewal notices, you can use QuickFill’s default page setups.

To print standard seven-inch long continuous form bills or renewal notices on a dot-matrix printer through QuickFill you must tell Windows about the unusual paper size that you will be using. This must be done on each workstation from which you will print bills or renewals. See the topic “How to set the paper size for bills and renewals” in the QuickFill help system for instructions.

Demonstration databases

When you install QuickFill, the demonstration databases are automatically created. You can use these databases to familiarize yourself with QuickFill’s features before you start entering real orders.

To run QuickFill with a demonstration database, use the icons “QuickFill Demo Database” and “QuickFill Audit Demo Database”, created by the installation program, on your desktop. You can also access the demonstration databases by clicking on the Windows ‘Start’ button and selecting ‘Programs’, ‘QuickFill’ and ‘QuickFill’. Once QuickFill is running, you can access the demonstration databases by selecting ‘File’, ‘Open database...’ and then selecting the Demo or AuditDemo folder and opening any one of the database files. Choose the Demo database if you want to work with a non-audited publication, or the AuditDemo database for an ABC audited publication.

To create a fresh copy of a demonstration database, choose the ‘Restore database’ command from the ‘File’ menu. Click the ‘Browse’ button and navigate to the QuickFill program folder.

For the standard (non-audit) database choose the file named Demo_Original_Database.zip.

For the audited database choose the file named AuditDemo_Original_Database.zip.

For the starter kit database choose the file named Demo_Starter_Kit_Database.zip.
Installation

Single-user installation

QuickFill Tours  During the installation of QuickFill, an icon for the tour of QuickFill was created on your desktop. If you have installed Adobe’s Acrobat® Reader on your workstation clicking on this icon will open the file TOURS.PDF. This file contains step-by-step instructions that guide you through the features of QuickFill (both standard QuickFill and QuickFill with the audit feature). The tours are also in this manual (see chapter 3, Tour of QuickFill, and chapter 5, Audit Tour of QuickFill).

Note: TOURS.PDF and Adobe’s Acrobat® Reader
You must have Adobe’s Acrobat® Reader installed on your workstation to view or print the TOURS.PDF file. If you do not have Acrobat® Reader installed, you can download a free copy of the reader from Adobe’s web site at http://www.adobe.com.

Creating desktop shortcuts
Running the QuickFill installation program, or the QuickFill workstation installation will create desktop shortcut icons for you. If you lose these shortcuts, or wish to create a customized shortcut, follow this procedure.

To create a QuickFill shortcut icon, click the Windows ‘Start’ button then select ‘All Programs’, and ‘QuickFill’. Hold down the Ctrl key and drag the QuickFill program icon to your desktop. This creates a copy of the QuickFill program icon. Be sure to hold down the Ctrl key, otherwise it will move the icon instead of creating a copy.

To create a shortcut for a particular database, right click the shortcut icon you just created and choose Properties from the menu that appears. Add the name of the database after the words Qfw.exe in the ‘Target’ box. So your shortcut might look this: C:\Qfw\Qfw.exe MYDB, where MYDB is the name of the database that this shortcut will open. This assumes that the MYDB database is located in the MYDB folder within the QuickFill program folder. If MYDB is located elsewhere, then replace MYDB with the full path to the database. For example: C:\Qfw\Qfw.exe D:\Databases\MYDB\MYDB.

For multiuser systems, if you would like to use your shortcut to open QuickFill in single user mode or lookup only mode, add /SINGLE or /LOOKUP respectively after Qfw.exe or the database name.

There is also a command line option, /NOZP4, which provides the ability to bypass attempts to connect to ZP4 address correction and certification software when opening a QuickFill database. Use this option if you find that QuickFill hangs with the message “Connecting to ZP4” on the screen while opening a database. This happens sometimes if there is an application installed in your system that does not correctly respond to DDE messages. If you are not using ZP4 software, you may want to add /NOZP4 to your shortcut for QuickFill so that your database opens more quickly.
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QuickFill’s ODBC driver
QuickFill includes an ODBC (Open Database Connectivity) driver which allows you to retrieve data from your database and create reports other than those provided by QuickFill itself. Common desktop applications such as Microsoft Access, Microsoft Excel and Crystal Reports all can be used to create reports using the ODBC driver. See appendix F, QuickFill & ODBC, for more detailed information.

QuickFill & ZP4 Software
QuickFill contains support for interactive address correction and certification using Semaphore Corporation’s ZP4 Software. If you are not already using ZP4, you can order it direct from Semaphore Corporation at http://www.semaphorecorp.com/cgi/order.html. A new CD must be purchased every two months in order to keep all address data up-to-date. Since ZP4 can be shared over a network, it is not necessary to purchase a CD for every workstation that accesses QuickFill. Refer to “How to,” “Certify customer addresses” in the table of contents for QuickFill’s built-in help system for more information on using ZP4 with QuickFill.

Creating another database
You may want to create more than one database. For example, you may want to keep publications, or groups of publications, that appeal to different audiences in separate databases.

You can create additional sets of database files on the same hard disk under a different name. To do this, go to the ‘File’ menu and select ‘New database’. Then, enter the name you would like to use for your new database. We recommend that your name not include any spaces. Database names with embedded spaces will work but will make some tasks more difficult. QuickFill will create a separate folder under the QuickFill program folder with this database name. Inside the database folder the thirteen database files will be named DatabaseName_H01.QFDAT through DatabaseName_H13.QFDAT. The ‘H’ in the name stands for the version of the database. When CWC revises the database, we’ll use the letters I, J, K and so on.

When you define a new database, the default folders for your report and mail-merge files will be the ‘Reports’ and ‘MailMerge’ folders inside the database folder. These folders will not be created until the first time QuickFill actually creates a report or mail-merge file.

Creating a choice list file
When entering customer addresses you may find that there are some elements of the address that occur so often that you would like to be able to have your data entry operators choose from a pop-up list of values. QuickFill allows you to define your own choice lists for the prefix, suffix, title, city, state, zip code, sex, and demographic code fields.

To use this feature you need to create a text file named “Customer.F2.” You should create the file using Windows Notepad or any other text editor. Do not
Installation

Single-user installation

use Microsoft Word. QuickFill will look for this file in the database folder first and then in the QuickFill program folder. To make a choice list file accessible to all of your databases, put it in the QuickFill program folder.

Warning: saving a choice list file

Make certain that your choice list file is saved as “Customer.F2” and not “Customer.F2.txt.” Windows Notepad will automatically add a “.txt” extension to file names if you are not careful. To avoid this problem when saving your file, enter “Customer.F2” in the ‘File name’ box, and then choose “All Files” in the ‘Save as type’ box. If you leave the ‘Save as type’ box set to “Text Documents (*.txt)” then Windows Notepad will silently change your file name to “Customer.F2.txt”.

Here is an example of a choice list file:

*PREFIX
Mr.
Mrs.
Ms.
Dr.

*SUFFIX
Jr.
Sr.
II
CPA

*TITLE
President
Vice President
Chief Executive Officer
Personnel Manager

*DEMCODEA
1 Government
2 Corporate managers
3 Law firms
4 Utilities
5 Libraries

The file is divided into sections with each section beginning with an asterisk and a keyword that indicates which field the choices belong to. In the sample demographic codes, notice that the descriptions are separated from the codes by three spaces. This is done so that when the operator selects an entry from the list only the code value, not the description, will be copied into the field. QuickFill only copies as much of the line as will fit into the field. Since the demographic fields are four-digit fields, we have positioned the descriptions beginning in column five. If you want to set up codes for the city, state, zip code, or demographic data fields (DEMDATA1 and DEMDATA2), you should position the descriptions beginning in column 27, 3, 11, or 20 respectively. (The city field is a 26-character field, the state field is a 2-character field, the zip code field is a 10-character field, and the demographic data fields are 19-character fields.)

The keywords that may be included in a choice list file are:

*PREFIX

*SEX

QuickFill
## Installation

### Single-user installation

<table>
<thead>
<tr>
<th><em>SUFFIX</em></th>
<th><em>DEMCODEA</em></th>
</tr>
</thead>
<tbody>
<tr>
<td><em>TITLE</em></td>
<td><em>DEMCODEB</em></td>
</tr>
<tr>
<td><em>COMPANY</em></td>
<td><em>DEMCODEC</em></td>
</tr>
<tr>
<td><em>CITY</em></td>
<td><em>DEMCODED</em></td>
</tr>
<tr>
<td><em>STATE</em></td>
<td><em>DEMDATA1</em></td>
</tr>
<tr>
<td><em>ZIP</em></td>
<td><em>DEMDATA2</em></td>
</tr>
</tbody>
</table>

The keywords *must* begin with an asterisk. Using all capital letters for the keywords is recommended but not required.
Installation

Multiuser installation

The setup for a multi-user version of QuickFill may be a little different than installations that you are used to. All of the QuickFill program files are placed in a shared folder on the file server. The program files are not installed on the individual workstations that will be accessing QuickFill; instead shortcuts are created on the workstations that refer to the program files that are on the file server. The advantage of setting up QuickFill this way is that it makes it very easy to install new versions of QuickFill. All you have to do is install the upgrade on the file server—no need to update the software on each workstation.

QuickFill requires the NetBIOS protocol. This should not be a problem since virtually all networks use the TCP/IP protocol as their primary transport these days. The TCP/IP protocol includes support for NetBIOS by default, although it can be disabled. If you are uncertain about this, please contact CWC Technical Support before proceeding with the installation.

There are two paths you can take at this point. The path you take depends on whether or not you have physical access to the file server console.

a. You have physical access to the server.

   Note: You should also take this path if you have a small network with no file server.
   Choose one computer in your network as the “server” and install the QuickFill software on that computer.

   Place the QuickFill CD in your CD drive – it should “auto” start. If, after a minute or so, the installation screen has not appeared then click on the Start button, select “My Computer” (or just “Computer” on Windows Vista), browse to the CD drive and double click the QuickFillInstall file. Now follow the screen prompts.

   The installer will propose that the QuickFill program files be installed to the folder at C:\Qfw. This is the normal choice, but you can elect to install the program files to another drive or folder if you wish.

   When it is finished, the installer will probably ask you to restart the server. If there are other users connected to the server you can postpone this restart until the end of the day. The restart is needed to put into place a registry change that is not required immediately but that is important to avoid data corruption in the long term (refer to “About…”, “Opportunistic locking” in QuickFill’s built-in help system for more information).

b. You must login to the server remotely (no physical access).

   Place the QuickFill CD in the CD drive of your computer. After the installation screen appears click ‘Cancel’. You are cancelling this because you want to install QuickFill on the server, not your own computer.
Installation

Multiuser installation

Open the Windows Remote Desktop program. For Windows XP, click Start, All Programs, Accessories, Communications, and Remote Desktop Connection. For Windows Vista, click Start, All Programs, Accessories, and Remote Desktop Connection.

Before you connect to the server, click the Options button and select the Local Resources tab. Make sure the Disk Drives box is checked in the section headed “Connect automatically to these devices when logged on to the remote computer.” On Windows Vista you must click the “More…” button to see this box. Now connect to the server. You will need to use a login ID that has administrative rights to the server.

Once you are logged into the server using Remote Desktop, select “My Computer” (or just “Computer” on Windows Vista). You should see the drives of your own computer listed like this:

\[\text{C on MYCOMPUTER} \quad \text{D on MYCOMPUTER}\]

Double click the drive letter that represents the CD drive on your own computer. You should now see the contents of the QuickFill CD-ROM. Double click the QuickFillInstall file to start the installation. Follow the screen prompts.

The installer will propose that the QuickFill program files be installed to the folder at C:\Qfw. This is the normal choice, but you can elect to install the program files to another drive or folder if you wish.

When it is finished, the installer will probably ask you to restart the server. If there are other users connected to the server you can postpone this restart until the end of the day. The restart is needed to put into place a registry change that is not required immediately but that is important to avoid data corruption in the long term (refer to “About…”, “Opportunistic locking” in QuickFill’s built-in help system).

The next three steps, sharing the program folder, branding QuickFill, and installing the lock manager, must be performed on the server. Do not log out of the Remote Desktop until you have completed those steps.

Sharing the program folder

If you are using a “Home” version of Windows Vista please call technical support for special instructions on sharing the QuickFill program folder. The following instructions assume you have a “Professional” or “Business” version of Windows.

Open “My Computer” and locate the folder where you installed the QuickFill program files (typically C:\Qfw). Right click on the folder and choose “Sharing
Installation

Multiuser installation

1.12 QuickFill

Branding your copy of QuickFill
Branding QuickFill puts into effect the license options that you purchased. If you do not perform this step QuickFill will operate as a demonstration version. You will be limited to the entry of no more than 200 customer records and multi-user access will not be allowed.

Click on the Start button, select Programs and then QuickFill. Now select ‘Brand QuickFill’. Enter your branding code and click ‘OK’.

Installing the lock manager
For multiuser systems QuickFill requires that separate application called the “lock manager” be installed. The lock manager does not itself access the database—it only acts as a “traffic cop” to control concurrent access to the database.

We recommend that the lock manager be run on the server where the database files will reside. The advantage of running the lock manager on the same computer as the database files is that the lock manager will be available whenever the database files are. If the lock manager is running somewhere else then it is easy to accidentally shut down the lock manager computer while other users are still using QuickFill.

If the lock manager is going to run on the server on which you ran the QuickFill installation then open “My Computer” (or just “Computer” on Windows Vista) and browse to the LockManager folder within the QuickFill program folder. Double click the LockManagerInstall file.

If the lock manager is going to run on some other computer then go to that computer and open “My Network Places” (or just “Network” on Windows Vista), locate the computer where QuickFill was installed and browse to the LockManager folder within the QuickFill program folder. Double click the LockManagerInstall file.

The Lock Manager installer will give you a choice of running the lock manager as a service or as a startup program. We recommend running it as a service.
Installation

Multiuser installation

When run as a service the lock manager will start and run invisibly in the background, even if nobody has logged on to the computer.

Windows XP Service Pack 2 and later (this includes Windows Vista) include a firewall. The firewall blocks incoming NetBIOS traffic unless you have enabled file sharing on your computer. To correct this problem, open the Windows Firewall control panel and make sure that the “File and Printer Sharing” box is checked on the “Exceptions” tab. If you do not do this, other workstations will not be able to communicate with the lock manager and you will get “lock manager has not been loaded” error messages.

You have now completed all of the tasks required on the server. You can log out of the server.

Run the workstation installer program on each workstation that will access QuickFill. (You do not need to run this on the server.)

From each workstation open “My Network Places” (or just “Network” on Windows Vista), locate the computer where QuickFill was installed and browse to the Workstation folder within the QuickFill program folder. Double click the WorkstationInstall file. When it is finished, the installer will probably ask you to restart the workstation.

The workstation installer creates shortcuts to the QuickFill program files that reside on the server. It also installs the component used for creating Excel reports from QuickFill report files and the registry entries needed for ODBC access to the QuickFill database and to disable opportunistic locking. In most cases, when you install newer versions of QuickFill you will not need to rerun the workstation installer. If we make a change that requires that the workstation installer be rerun we will notify you in the memo that accompanies the upgrade CD.

The rest of the installation procedure for a multiuser system is the same as for a single user system. You can proceed from the “Database setup” topic on page 1.4 of this chapter.
Installation

Startup problems

If QuickFill can’t start up, you’ll see one of these messages:

**Can’t find database C:\Qfw\QfwdbX.qfdbd**
QuickFill couldn’t locate the above-mentioned file (where ‘X’ is the version letter of the database you are currently installing). This file should be in the program folder. Make sure that the file is there.

**Unable to open database file C:\Qfw\Qfwdb\Qfwdb_X04.qfdat**
QuickFill couldn’t locate one of the database files (where ‘X’ is the version of the database you are currently installing). There are 13 of these files, all with the extension “.qfdat.” These files should be in the database folder. Make sure that the files are there.

**A failure occurred during an update. The database must be restored.**
In general, your database is protected from corruption by power failures at all times except when running an Update. If the power should fail in the middle of entering a transaction or posting a batch, QuickFill will recognize this the next time you start up and will either finish the partially completed transaction or remove it from the database. If this should happen to you, then you should check to see whether your last transaction was completed and reenter it if necessary.

If QuickFill crashes, the power fails or the computer is rebooted in the middle of an update, then QuickFill will display the message shown above, and you will have to restore the database from a backup copy.

Since you may at some point have to restore QuickFill from a backup copy, make sure to back up your database frequently. By frequently we mean at least once a day—even more often if you’ve entered a lot of transactions and don’t want to risk having to enter them again. In the next section, we tell you what you need to know about backing up your database; please read this section carefully.

**Lock manager has not been loaded.**
This message applies to multiuser systems only. The lock manager program has not been run on any machine in the network or, if you are running Windows XP Service Pack 2 and later (this includes Windows Vista), the Windows firewall is blocking incoming NetBIOS traffic. See p. 1.12, in this chapter, for information on lock manager installation and p. 1.13 for information on the lock manager and the Windows firewall.
Backing up the system

Why make frequent backup copies of your QuickFill database? Here are some of the reasons:

- Your power might fail at the wrong moment, leaving you with a corrupted database. (See chapter 6, *File commands*, p. 6.4, for more details on detecting a corrupt database.) You’ll have to reload (restore) the database from a backup copy.

- Your computer hardware might fail, putting you out of action until it can be repaired. If you have a backup copy, you can load your database on another computer, re-enter the work done since the backup copy, and then continue working with QuickFill.

- Your computer might be destroyed in a fire. (It’s a good idea to keep a backup copy of your database in another location.)

- You might want to run a report using an old copy of the database.

For all these reasons, it is extremely important to make frequent backup copies of your database. We strongly recommend backing it up daily—in the afternoon after you finish the day’s work. You can schedule your back up to run with the “Tonight’s jobs” job list. (See chapter 13, Jobs, p. 13.2, for more information on the “Tonight’s jobs” job list.)

Also, back up your database just before you run any of the updates, such as bills, renewal notices, or issue labels.

- After viewing the output from an update, you may need to change a definition (such as a message for bills, or an offer for renewal notices) that was setup incorrectly. In order to re-run the update, you would first need to restore your database from a back up copy and change the definition(s).

Finally, make a backup copy if you’ve just finished entering a large number of new orders, payments, renewals, or other transactions. After all, you don’t want to take a chance that you’ll have to enter all those transactions again.

You should also keep more than one backup copy. We recommend that you rotate your backups among at least five sets of backup tapes, one for every workday. We also suggest that you take a copy home with you at least once a week. At the end of every month, just before you close the accounting period, make a special backup copy on a new tape. Keep this month-end copy for at least a year—you may need it as an audit trail for your accountant.

There are many methods of making backups. However, we recommend using QuickFill’s built-in backup program. See chapter 6, *File commands*, p. 6.7, for more details on backing up from within QuickFill.
Chapter 2

Basics

- The main menu
- The toolbar
- Working with screen forms
- Function keys & mouse button options
- Lists
Basics

The main menu

In this chapter, we give you the building blocks you need to work with QuickFill. Take a few minutes to read over it carefully. Mastering these basics will not take long, but we recommend investing a little time at the outset. Doing so will guarantee the ability to use QuickFill with greater ease and efficiency down the road.

As you read this information, “test out” what you’re reading in the demo database. By following along with the demo, you’ll speed up the learning process considerably. (Don’t worry about making mistakes in the demo; that’s what it’s for. You can’t harm a thing; we promise. You can always restore the demo if you need to.)

The main menu

This section will give you an overview of QuickFill’s main menu and submenus. We also explain the commands you use to move around the menus. (For further details on any of the menu items, refer to the built-in help system.)


You can move the cursor from heading to heading by using your mouse or by pressing the “Alt” key so that the cursor appears on the ‘File’ menu option and then using the left- or right-arrow key. (The cursor appears as a blue rectangle. Depending on your workstation’s platform, the blue cursor may not appear until you have pressed the “Alt” key and then press either the Up- or Down-Arrow key.) As you do, you’ll see submenus appear under the main headings. To select one of these submenu options, move the cursor using your mouse or the up- or down-arrow key until you’ve positioned it on the item you want. Then either click once on the item or press Enter.

When you select some of the submenu options, you’ll see a list of more items from which to choose. For example, when you select ‘Marketing’ under the main menu heading ‘Definitions’, you’ll see that you can choose from ‘Plans’, ‘Tracking Codes’, ‘Offers’, ‘Premiums’, ‘Lists’, ‘Packages’, or ‘Channels’. You choose one of these items in the same way that you select a submenu item; that
is, just move the cursor up or down by using your mouse or the arrow keys until the cursor is on the item you want. Then either left click once or press Enter. To exit from this list of items, press Esc. QuickFill will return you to the submenu. Press Esc again, and QuickFill will return you to the main menu.

**Accelerator keys**

Instead of moving the cursor with the arrow keys, you can select any main menu option more quickly by pressing the “Alt” key, releasing it, and then typing the underlined letter of the option you want. This is referred to as “using accelerator keys.” For example, if you want to select ‘Definitions’ from the main menu, just press and release the “Alt” key and then press “D.” Once you have displayed a menu, you need only type the underlined letter to access an item on that menu. If you want to select ‘Marketing’, the first submenu option under ‘Definitions’, press “M.” Sometimes there is more than one menu option that begins with the same letter. For example, in the ‘Definitions’ submenu, there are entries for ‘Publications’ and ‘Preferences’. In this case, pressing the “P” key will select each of these entries in turn. Just press the Enter key after you reach the one you want.

What do you do when the screen that is displayed contains a field with the same “key” letter as a main menu item that you want to go to? Let’s say, for example, that you are on the ‘Lookup’ screen and you want to use the keyboard to move to ‘Customer Details lookup’ screen. In situations like this, pressing the “Alt” key, releasing it, and then pressing the letter that is underlined will bring you to the main menu. To get to a particular field on a screen, you press and hold down the “Alt” key, releasing it, and then pressing the letter that is underlined. So, to get to the ‘Customer Details lookup’ screen, you would press “Alt-D.”

Now we’ll take a closer look at the ‘Edit’, and ‘Help’ main menu items. (We will look at the remaining main menu items in their respective chapters.)

<table>
<thead>
<tr>
<th>QuickFill</th>
</tr>
</thead>
<tbody>
<tr>
<td>File</td>
</tr>
</tbody>
</table>

The Edit menu offers the following commands:

- **Undo**: Reverse previous editing operation.
- **Cut**: Deletes data from the document and moves it to the clipboard.
- **Copy**: Copies data from the document to the clipboard.
- **Paste**: Pastes data from the clipboard into the document.
Basics

The main menu

- **Next record**: Displays the next customer/subscription.
- **Prior record**: Displays the prior customer/subscription.
- **Next major tab**: Displays the next major tab when multiple tabs (such as a definition screen, a transaction screen, etc.) are open.
- **Prior major tab**: Displays the prior major tab when multiple tabs (such as a definition screen, a transaction screen, etc.) are open.
- **Next minor tab**: Displays the next minor tab within a multiple tab screen (such as the publication definition screen, the adjust order screen, etc.).
- **Prior minor tab**: Displays the prior minor tab within a multiple tab screen (such as the publication definition screen, the adjust order screen, etc.).

The Help menu offers the following commands, which provide you assistance with this application:

- **Help table of contents**: Displays a table of contents with topics on which you can get help.
- **Help for this screen**: Provides information about the screen you are currently on.
- **About QuickFill**: Provides information about your QuickFill installation.
The Toolbar

The toolbar is displayed across the top of the application window, below the menu bar. It provides quick mouse access to many tools used in QuickFill. When you install QuickFill, a default tool bar is already set up for you.

Changing the tool bar

You can move or delete a toolbar button by simply pressing the SHIFT key and, while holding it down, using your mouse to click on the button and drag it to a new location (to move it) or off the tool bar (to delete it). You can also move and delete toolbar buttons by using the “Customize toolbar” screen.

To display the “Customize toolbar” screen either double click on the tool bar or select ‘Customize toolbar’ from the ‘Other’ menu. Once this screen is displayed, you can use the appropriate buttons to add, remove, and/or change the order of the tool bar buttons. In addition, you can group buttons together by adding the “Separator” button before and after a set of buttons as well as restore the tool bar to its default setup.

Note: changing tool bar settings

Any toolbar changes that you make are recorded in the registry for the user of the machine from which the change is made. Changes do not affect other machines on your network. Therefore, each Windows user can have a custom tool bar setup.

The following is list of the available tool bar buttons and their functions:

<table>
<thead>
<tr>
<th>Button</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Separator" /></td>
<td>The “Separator” button provides the ability to change the spacing between tool bar buttons.</td>
</tr>
<tr>
<td><img src="image" alt="Remove" /></td>
<td>Remove selected data from the screen and store it on the clipboard.</td>
</tr>
</tbody>
</table>
Basics

The Toolbar

- Copy the selection to the clipboard.
- Insert the contents of the clipboard at the insertion point.
- Display the next customer/subscription/definition.
- Display the previous customer/subscription/definition.
- Open the main lookup screen.
- Change a customer’s address.
- Create a one-shot label.
- Copy customer data (label image, phone, fax, email, and/or demographic data) to your workstation’s clipboard.
- Add a comment to the subscription history.
- Cancel a subscription.
- Create a subscription summary report.
- Open the ‘Print saved reports’ screen.
- Edit a job list.
Basics

The toolbar

Open the ‘Database check’ screen.

Display the table of contents for the help system.

Display help for a specific screen.

Display the ‘About QuickFill’ screen.

Close the current major tab.

*Open the new order batch screen.

*Open the payment batch screen.

*Open the renewals batch screen.

*Open the combination orders batch screen.

*Open the prospects batch screen.

*Open the controlled subscriptions (audit system).

*Open the controlled requalifications batch screen (audit system).

*Note: If you have unposted batches, the toolbar button above will bring you to the “Unposted batches” screen instead.

Suspend a subscription.
Basics

The Toolbar

- Reinstate a subscription.
- Merge customers.
- Perform a ‘Group change’.
- Extend a subscription.
- Bounce a payment.
- Transfer a payment.
- Perform a ‘Refund’.
- Add a bill-to customer.
- Delete a bill-to customer.
- Adjust an order or prospect depending on whether you have looked up an order or prospect prior to selecting this button.
- Adjust qualification data (audit system).
- Remove an order or prospect depending on whether you have looked up an order or prospect prior to selecting this button.
- Create a replacement bill.
Create a replacement renewal.

Create a replacement acknowledgement.

Send an email message to a customer.
When you work with QuickFill, you’ll spend most of your time filling out forms on the screen. This section explains what you need to know to fill out these forms, including how to get from field to field and how the function keys work. (A field is simply an area on the screen into which you can enter data.)

The parts of the form you can fill in—the fields—are rectangular and have a white background.

In some cases, fields are “protected.” That is, you cannot type data into them directly. Instead, you must use the function keys, the right mouse button, or click on the arrow (in the far right side of the field) for a list of valid choices. If you try to type directly into a “protected” field, QuickFill will display a warning, like the one below, and provide you with a list of the available function keys for that field.

![QuickFill for Windows](image)

If you use the Tab key or Arrow keys to move to a field that already has an entry in it, it is highlighted with a blue color. Within the highlighted field, a blinking cursor tells you where the next character you type will appear. You
Basics

Working with screen forms

can correct any mistakes you make by pressing “Backspace” to erase the previous character. You can also use your mouse to click and drag the cursor so that the entry in the field becomes highlighted and then type the correct entry or press “Delete” to erase the entry.

*Note: Arrow keys*

The up- and down-arrow keys move the cursor to the next or previous field respectively as long as you are not in a field with radio buttons, a multiline edit field (such as the comment field), a right justified field (such as the price, tax, and shipping fields on order screens), or a list field (such as the customer list in lookup). When in a field with radio buttons or a list, you can use the up- and down-arrow keys to move within that field. To move to the next field, use the Tab and Shift-Tab keys.

The cursor usually appears as a blinking line. If you are in a field that already contains an entry, QuickFill inserts the characters you type before the letter on which the cursor is sitting. The character on which the cursor is sitting slides over to the right to make room for the new characters. If the contents of the field you are in are highlighted, anything you type replaces whatever is already in the field (provided you are not in a protected field—one for which you must press F2 or right click to select an entry).

**Date fields**

Date fields have preset separators (usually slashes) in the correct positions (refer to “Date format” in the built-in help system’s index for more information on date formats). That means that you don’t have to type them in. In fact, the cursor automatically skips over them to the space where you should enter the next number.

**Issue range fields**

Whenever you use issue range fields (such as the ‘Expire issue’ fields on the ‘Promotional labels’ report) and do not fill in both fields, QuickFill will only include one issue based on the entry in the field you did fill in. For example, if you enter “___ to 40” or “40 to ___” QuickFill will only include issue 40. In addition, if you enter a zero in one of the fields, that field will be treated as if it were blank. So if you run a report using an issue range of “0 to 40,” QuickFill will only include issue 40.

**Dollar amount and other numeric fields**

QuickFill’s dollar fields accommodate amounts up to and including "$999,999.99”. Fields containing dollar amounts and other numbers are always left justified. When you start typing into one of these numeric fields, whatever was previously in the field moves to the right. But if you use the left- and right-arrow keys to move the cursor, you can change a specific portion of the number in the field. So if you want to enter a new number in one of these
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Working with screen forms

fields, highlight the entry in the field and then just start typing. But if you want to change just one or two digits, move the cursor to the correct position, highlight the digit(s), and enter the new digit(s).

Another point about these fields: you do not need to type the decimal point and cents if you’re entering an even dollar amount—5.00 or 50.00, say. Just enter the dollar amount, and use the Tab key to move to the next field. Similarly, when you enter a sales tax rate that has three decimal places, you don’t need to enter the decimal point if the rate is a whole number. QuickFill automatically adds the decimal point and zeroes for you. (You do need to enter the decimal point if you’re not entering an even amount.)

Moving from field to field

When you’ve finished entering data in a field, you can move to the next field by clicking on it, pressing the Tab key, or pressing the down-arrow key. To move to the previous field, click on it, hold down the Shift key while you press the Tab key, or press the up-arrow key.

When you are on a screen that contains sections with check boxes or radio buttons, you can use the left- and right-arrow keys (or depending on the position of the fields, the up- and down-arrow keys) to move from check box to check box or button to button. Any time you are on a field that has a check box or button, the field will become framed with dotted lines (see the ‘Nonqual paid’ field below).

Note: next field

The “next” field is usually the field to the right of the current field or the first field on the line below the current field. However, in some cases, the screen forms are arranged in columns. So as you go from field to field, you move down one column, then back to the top of the next column.

Selecting check box and radio button fields

In order to select a field that contains a check box (see the “paid” fields above), you can either click on it once so that a check mark appears or press the space bar while you are on the field so that a check mark appears in it.

To unselect a field, click on it again.
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Working with screen forms

To select a field that contains a radio button (see the “Summary,” “Detailed,” “Orders,” and “Copies” fields above), you can either click on the field so that the button becomes filled in or use the Tab and arrow keys as described above so that the button becomes filled in.

Whenever you are on a check box or radio button field, a frame with dotted lines will appear around it (see the “Nonqual paid” field above).

Moving from record to record in Lookup

To move from one customer record to the next while in Lookup, press the Ctrl and PgDn keys simultaneously (Ctrl PgDn). To move to the previous customer record, press the Ctrl and PgUp keys simultaneously (Ctrl PgUp). You can also click on the next record and prior record toolbar buttons to perform the same functions. These key combinations and buttons may be used when you are viewing ‘Customer details’ or ‘Subscription and prospect records’ in Lookup. They are particularly helpful on the ‘Subscription and prospect records’ screen because they provide the ability to move from one customer record to another while at the same time viewing the publications to which the customers subscribe.

The Ctrl PgDn and Ctrl PgUp keys may also be used to move from one definition to another. These keys will work on any definition screen for which you have pressed “Alt-C” or clicked on “Change” to get it. For example, if you went to ‘Offers’ (under ‘Marketing’ definitions), moved the cursor to a particular offer, and pressed “Alt-C” or clicked on “Change” to view it, you can then press Ctrl PgDn to display the next offer’s definition (the one below it). To display the previous offer’s definition (the one above it), you could press Ctrl PgUp.

Moving from screen to screen

When you have multiple screens (transaction screens, definition screens, report screens, etc.) open, you can move between screens by pressing the left- and right- arrow keys while you are holding down the ALT key. You can also select ‘Next major tab’ and ‘Prior major tab’ from the ‘Edit’ menu.

Moving from tab to tab in multiple tab screens

When you are in a transaction, definition, update, or report that contains more than one tab (such as the adjust order transaction), you can move from tab to tab by pressing the left- and right- arrow keys while you are holding down the CTRL key. You can also select ‘Next minor tab’ and ‘Prior minor tab’ from the ‘Edit’ menu.

Finishing the form

When you’ve finished filling out a form, click on “OK” to save the data that you’ve just entered. On screens that have only the “OK” and “Cancel” buttons, you can also save your changes by pressing Enter.

If you want to escape from a form without saving your changes, press Esc.

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Function keys & mouse button options

The F1 key – the help key

F1 is the help key. You can get help at any time—either when you’re at the main menu or when you’re filling out a form. If you press F1 when you’re at the main menu, QuickFill explains the currently highlighted menu item. If you press F1 when you’re working on a form, QuickFill describes each field in the form. In either case, you can use the up- and down-arrow keys and the PgUp, PgDn, Home, and End keys to scroll through the help text. If you press F1 a second time, Windows help appears. (Note, depending on your desktop settings, Windows help may appear behind any other windows that are open on your screen.)

You can also access help by clicking on the "Context help" toolbar button, moving the “question mark” to the screen, and clicking once.

Note: viewing help files—Help file links

Most help files contain links to other related help files. For example, the description for the F1 key mentions that help may also be accessed by using the “Context help” button and contains a link to the help file for the “Context help” button. This function is meant to provide additional details for those who would like it.

Any time you see text that is highlighted green and underlined, that text is linked to another help file; one that contains additional details related to the topic for which you originally accessed help. To display these details, click on any portion of the text that is highlighted green and underlined.
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Function keys & mouse button options

In addition, any time you see a box with text to the right of it, you can click on the box to see a list of other screens related to the help topic you are looking at.

To exit from Help and return to the form on which you’re working, press Esc, click on “File” and then “Exit,” or click on the close button in the upper right hand corner of the help window.

The F2 key – selecting a value from a list

In ‘Definitions’, you often assign codes to items. For example, QuickFill asks you to assign a short code name to each mailing list you use—BIZWK for BusinessWeek, say. Some fields require you to enter these special codes. In these fields, you can press F2, right click in a field, or click on the arrow on the far right side of a field to see a list of available codes. If F2 is available in a field, a prompt appears on the bottom line of the screen to remind you that you can press F2 or use your mouse to display a list of correct codes. (See chapter 1, Installation, p. 1.7, for details on creating your own selection lists.)

After pressing F2 or using your mouse to display a list of codes, select a code by using the up- and down-arrow keys to scroll through the list. You can also move through a list by clicking on the up- and down-arrow buttons to the right of the list. The single arrow buttons will move through the list code-by-code. The double arrow buttons are equivalent to using the PgUp and PgDn keys; they can be used to page through the list.

Once the code you want to use is highlighted, press Enter or click on the code. The list of codes disappears, and QuickFill enters the code you’ve chosen in the field. Using F2 or your mouse to display a list of codes is an easier way to enter data in a field instead of typing it in. You’ll also find this feature helpful if you can’t remember a particular code.

In some cases a field is “protected.” That is, you cannot type data into the field directly. Instead, you must use F2, right click once and choose “Pick X,” or click on the arrow on the far right side of the field to select a code from a list. Usually a field is protected only when it refers to a record that you defined previously. (The code that belongs in the field replaces the “X.” For example, if you were in the ‘Message1’ field on the ‘Billing series’ screen and used your right mouse button, “Pick message” would appear as one of your options.)

Example: QuickFill won’t let you type directly into the ‘Offer’ fields when you’re filling out the tracking code definition form. Instead, a warning message will appear and you will be instructed to use the function keys (F2 to select, F3 to edit, F4 to define, or F5 to clear) or the right mouse button for the field.
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The F4 key – creating a new definition

What happens if you must use F2 or right click to select from a list of previously defined records and find that you haven’t yet defined that record? In most cases, you can press F4 or right click and select “New X” to call up the form you need to define the record. (The code that belongs in the field replaces the “X.” For example, if you were in the ‘Message1’ field on the ‘Billing series’ screen and used your right mouse button, “New message” would appear as one of your options.)

Example: Say you’re entering a new billing series and want to define a billing package for the series. When you put your cursor in the ‘Package’ field, you get this message on the bottom of the screen: “Press F2 to select from a list of codes.” To define a new billing package, press F4 or right click once and select “New package,” and QuickFill calls up the form you need to define a new billing package. Fill out the form and, when you’re done, click on “OK” or press Enter to save your definition. QuickFill then returns you to the billing series form. And it automatically enters the code for the package you’ve just defined in the ‘Package’ field.

The F3 key – changing an existing definition

Usually, when the F4 or “New X” option is available for defining new records, you can also use F3 or right click and select “Change X” to change records you defined previously. (The code that belongs in the field replaces the “X.” For example, if you were in the ‘Message1’ field on the ‘Billing series’ screen and used your right mouse button, “Change message” would appear as one of your options.)

Example: You define your new billing package, then realize that you entered the form code incorrectly. Just move the cursor back to the billing package field, and press F3 or right click and select “Change package.” QuickFill again displays the billing package form. Correct the fields that you want to change, and click on “OK” or press Enter to save your changes. After you’re done, QuickFill will return you to the billing series.

Note: linked definitions

QuickFill allows a definition to be linked to several other definitions. For example, you can define an offer with a price of $100.00 and a term of 12 issues, then define a number of tracking codes and renewal efforts (using this offer) without having to reenter it. When entering each tracking code or renewal effort, you use the F2 key or right click once to display a list offers. Then select the offer for 12 issues at $100.00.

The ability to “point and shoot” is a convenience, but it can also lead to surprises for unwary users of the F3 key or “Change X” option. Say
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you decide to increase the price on your renewal notices to $110.00 but you want to leave the price for new subscribers at $100.00. You bring up the definition screen for the first renewal effort in your series, use the F3 key or right click and use the “Change X” option to display the offer linked to the renewal effort, and change the price to $110.00. Because the offer record was originally linked to both tracking codes and renewal efforts, you have inadvertently changed the prices for both renewals and new subscriptions to $110.00!

In this situation you should create the new offer with the $110.00 price separately, using the ‘Offers’ definition screen, bring up each renewal effort, and then use the F2 key or right click once and use the “Pick X” option to select the $110.00 offer instead of the original one. By doing this you will leave the original offer intact.

The OK button–saving data and go ahead

The “OK” button has a dual purpose in QuickFill. You select it to tell QuickFill to accept, or save, the data you’ve entered. But this button also acts as QuickFill’s trigger—that is, it tells QuickFill to go ahead and take the next appropriate action.

Example: You choose ‘New order history’ under ‘New order reports’ on the ‘Reports’ main menu and fill out the filter screen. Click on “OK,” and a box with a message asking when the report should be run appears.

The Esc key or Cancel button

Give up, abort. Use the Esc key or “Cancel” button to exit from the screen you are currently on without saving any changes you may have made. If you perform this action from a batch screen, you will be returned to the main menu and any orders, prospects, renewals, or payments entered in the batch will remain on the unposted batches screen for that transaction. If, however, you perform this action while on the customer address form screen, the information you entered will not be saved.

Other function keys and mouse button options for editing

F5—erases the contents of an entire field; this function key is only active when in a date field or a field for which there is a selection list. (This action may also be performed in “protected” fields, by right clicking once and then selecting “Clear.”)

Cut—deletes the highlighted area.

Copy—copies the highlighted area.

Paste—pastes the information previously cut or copied into the field in which the cursor is located.
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When the cursor is in a field that allows editing, you can select text and then right click on that text to display a menu with undo, cut, copy, paste, delete, and/or select all options.
## Basics

### Function keys & mouse button options

#### Summary of keyboard & mouse button options

<table>
<thead>
<tr>
<th>Keyboard</th>
<th>Mouse</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter</td>
<td>“OK” button</td>
<td>Saves changes to the screen on which you are working.</td>
</tr>
<tr>
<td>F1</td>
<td>“Context” help toolbar button</td>
<td>Displays QuickFill help. Pressing F1 a second time displays Windows help.</td>
</tr>
<tr>
<td>F2</td>
<td>Right click &amp; select “Pick X” option</td>
<td>Displays list of choices from which to select for the field in which the cursor is located.</td>
</tr>
<tr>
<td>Home</td>
<td></td>
<td>Moves the cursor to the first code in a selection list—displayed by right clicking or pressing F2.</td>
</tr>
<tr>
<td>End</td>
<td></td>
<td>Moves the cursor to the last code in a selection list.</td>
</tr>
<tr>
<td>F3</td>
<td>Right click &amp; select “Change X” option</td>
<td>Displays the definition of the code currently in the field in which the cursor is located so that it may be changed if desired.</td>
</tr>
<tr>
<td>F4</td>
<td>Right click &amp; select “New X” option</td>
<td>Displays an empty definition form so that a new definition may be created for the field in which the cursor is located.</td>
</tr>
<tr>
<td>F5</td>
<td>Right click &amp; select “Clear X” option</td>
<td>Clears the entry in the field in which the cursor is located; F5 is only active when in a field for which there is a selection list.</td>
</tr>
<tr>
<td>Delete or Backspace</td>
<td>Highlight, right click and select “Cut” or “Delete”</td>
<td>Deletes the characters in the field. If you highlight the entire contents of a field and press the “Delete” key or “Backspace” key, the highlighted text will be deleted.</td>
</tr>
<tr>
<td>Esc</td>
<td>“Cancel” button</td>
<td>Give up, abort.</td>
</tr>
<tr>
<td>Tab</td>
<td>Left click</td>
<td>Moves the cursor to the next field.</td>
</tr>
<tr>
<td>Shift-tab</td>
<td>Left click</td>
<td>Moves the cursor to the previous field.</td>
</tr>
<tr>
<td>Down-arrow</td>
<td></td>
<td>Moves the cursor to the next field as long as you are not in field with radio buttons, a multiline edit field (such as the comment field), a right justified field (such as the price, tax, and shipping fields on order screens), or a list field (such as the customer list in lookup). When in a field with radio buttons or a list, the down-arrow key can be used to move within that field; to move to the next field use the Tab key.</td>
</tr>
</tbody>
</table>
## Basics

### Function keys & mouse button options

<table>
<thead>
<tr>
<th>Key</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Up-Arrow</td>
<td>Moves the cursor to the previous field as long as you are not in field with radio buttons, a multiline edit field (such as the comment field), a right justified field (such as the price, tax, and shipping fields on order screens), or a list field (such as the customer list in lookup). When in a field with radio buttons or a list, the up-arrow key can be used to move within that field; to move to the next field use the Shift-Tab keys.</td>
</tr>
<tr>
<td>Ctrl-PgDn</td>
<td>Next record toolbar button</td>
</tr>
<tr>
<td>Ctrl-PgUp</td>
<td>Prior record toolbar button</td>
</tr>
<tr>
<td>Alt-RightArrow</td>
<td>Left click on tab</td>
</tr>
<tr>
<td>Alt-LeftArrow</td>
<td>Left click on tab</td>
</tr>
<tr>
<td>Ctrl-RightArrow</td>
<td>Left click on tab</td>
</tr>
<tr>
<td>Ctrl-LeftArrow</td>
<td>Left click on tab</td>
</tr>
<tr>
<td>Ctrl-L</td>
<td>“Lookup” toolbar button</td>
</tr>
<tr>
<td>Ctrl-N</td>
<td>“New orders” toolbar button</td>
</tr>
<tr>
<td>Ctrl-P</td>
<td>“Payments” toolbar button</td>
</tr>
<tr>
<td>Ctrl-R</td>
<td>“Renewals” toolbar button</td>
</tr>
<tr>
<td>Ctrl-I</td>
<td>“Combination orders” toolbar</td>
</tr>
<tr>
<td>Ctrl-F</td>
<td>“Prospects” toolbar button</td>
</tr>
<tr>
<td>Ctrl-O</td>
<td>“Controlled subs” toolbar</td>
</tr>
<tr>
<td>Ctrl-U</td>
<td>“Requalifications” toolbar</td>
</tr>
<tr>
<td>Ctrl-K</td>
<td>“Cancel” toolbar button</td>
</tr>
<tr>
<td>Ctrl-S</td>
<td>“Suspend” toolbar button</td>
</tr>
<tr>
<td>Ctrl-G</td>
<td>“Group change” toolbar</td>
</tr>
</tbody>
</table>

Displays the next definition/record.  
Displays the previous definition/record.  
Displays the next major tab when multiple tabs (such as a definition screen, a transaction screen, etc.) are open.  
Displays the prior major tab when multiple tabs are open.  
Displays the next minor tab within a multiple tab screen (such as the publication definition screen, the adjust order screen, etc.).  
Displays the prior minor tab within a multiple tab screen.  
Displays the “Lookup” screen from within a transaction.  
Displays “Lookup” screen.  
Displays “New orders” batch screen.  
Displays “Payments” batch screen.  
Displays “Renewals” batch screen.  
Displays “Combination orders” batch screen.  
Displays “Prospects” batch screen.  
Displays “Controlled subscriptions” batch screen.  
Displays “Requalifications” batch screen.  
Displays “Cancel” screen.  
Displays “Suspend” screen.  
Displays “Group change” screen.
## Basics

**Function keys & mouse button options**

<table>
<thead>
<tr>
<th>Shortcut</th>
<th>Toolbar Button</th>
<th>Screen Displayed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl-A</td>
<td>“Address change” toolbar button</td>
<td>Displays “Address change” screen.</td>
</tr>
<tr>
<td>Ctrl-E</td>
<td>“Extension” toolbar button</td>
<td>Displays “Extension” screen.</td>
</tr>
<tr>
<td>Ctrl-B</td>
<td>“Bounced payment” toolbar button</td>
<td>Displays “Bounced payment” screen.</td>
</tr>
<tr>
<td>Ctrl-T</td>
<td>“Transfer payment” toolbar button</td>
<td>Displays “Transfer payment” screen.</td>
</tr>
<tr>
<td>Ctrl-J</td>
<td>“Adjust” toolbar button</td>
<td>Displays “Adjust order” or “Adjust prospect” screen.</td>
</tr>
<tr>
<td>Ctrl-D</td>
<td>“Adjust qualdata” toolbar button</td>
<td>Displays “Adjust qualification data” screen.</td>
</tr>
<tr>
<td>Ctrl-M</td>
<td>“Oneshot label” toolbar button</td>
<td>Displays “Make label” screen.</td>
</tr>
<tr>
<td>Ctrl-Q</td>
<td>“Add comment” toolbar button</td>
<td>Displays “Add comment” screen.</td>
</tr>
</tbody>
</table>
Lists

QuickFill often shows you a list of items and expects you to select one item from the list. For example, you’re shown a list of codes when you press F2 or right click once in a field. As mentioned above you select an item by moving the cursor until the item you want is highlighted. Then you press Enter or click on it. If the list is very long, you may find it faster to page through it by using the PgUp and PgDn keys. You can also jump to the first entry in a list by pressing Home or to the last entry by pressing End. Finally, you can use the scroll bars to the right of the list to scroll through it.

Note: wheel mice

QuickFill supports the use of wheel mice (in Windows 98 and higher) in all scrollable lists. To scroll using the wheel, first set the focus on the scrollable list by clicking within it. By default, moving the wheel one click scrolls three lines. You can change the number of lines scrolled on the Windows mouse control panel. Holding down the Ctrl key and moving the wheel one click is equivalent to clicking the double-arrow scroll buttons.

With some types of lists, you’ll see at the bottom of the screen a choice of actions to take. For example, when you select ‘Publications’ from the ‘Definitions’ menu, QuickFill shows you a list of the publications you’ve already defined, together with five types of actions you can take. So the screen looks like this:
When you first select ‘Publications’, the cursor is on the first publication in the list. As always, you can move the cursor up or down in the list by using the up- and down-arrow keys.

At the bottom of the screen, you see four of the five actions you can take on a publication. You can define a new publication, change the definition of a publication, delete a publication, or replicate the definition of a publication in order to define a new one (refer to the built-in help system for details on publication definitions). The fifth action that may be taken is to exit the screen by clicking on the “Close” button. You can also use the Esc key to perform the same action.

Press Enter anywhere in the list, and QuickFill displays the definition of the publication on which the cursor is located. Use the tab key to move the cursor to the first action (“New”) on the screen. Now you can use the left- and right-arrow keys to move to another action. For example, to replicate the sample monthly publication, move the cursor to the second publication in the list, and press Tab. Then use the right-arrow key to move the cursor to “Replicate” and press Enter.

There’s also a faster way to select an action. Just click on the button for it or press the “Alt” key plus the key corresponding to the first underlined letter of the action you want to take. For example, if you want to “change” a publication, highlight the publication and then click on “Change” or press
"Alt-C." To replicate the sample QWKFL publication, move the cursor to the second publication in the list, and click on “Replicate” or press “Alt-R.”

As always, you can use Esc to back up a step if you change your mind. For example, if you’ve clicked on “Change” and you are now looking at the definition for the sample quarterly publication, press Esc, and you’ll return to the publication list.
Chapter 3

Tour of QuickFill

- The nonaudit demonstration database
- Definitions
- Transactions
- Updates
- Reports
- Job lists
The nonaudit demonstration database

QuickFill’s demo databases give you real data with which to explore and experiment. The nonaudit demo database contains two publications and 147 customers. One of the publications—QuickFill: Subscription Fulfillment Made Easy!, publication code QWKFIL—is a monthly. The other—Advances in Circulation, publication code AIC—is a quarterly; both are owned by a company called CWC Software, Inc. Below is a summary of important information for each publication.

<table>
<thead>
<tr>
<th></th>
<th>QWKFIL</th>
<th>AIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>First issue (ever)</td>
<td>01/02</td>
<td>Fall 04</td>
</tr>
<tr>
<td>Most recent issue</td>
<td>11/04</td>
<td>Winter 04</td>
</tr>
<tr>
<td>fulfilled</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Most recent billing</td>
<td>11/19/04</td>
<td>11/25/04</td>
</tr>
<tr>
<td>update</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Most recent renewal</td>
<td>11/15/04</td>
<td>None</td>
</tr>
<tr>
<td>update</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

To make the demo as realistic as possible, we’ve tried to simulate many of the normal activities that take place during the life of a publication. For example, QWKFIL has had four promotional mailings. These mailings—and the orders that came from them—have been spread over 2001, 2002, 2003, and 2004. The second publication, AIC, is new and has only 15 subscribers.

Note: starter kit demonstration database

If your QuickFill system is a starter-kit system, your demonstration database will only contain QuickFill: Subscription Fulfillment Made Easy!, publication code QWKFIL.
Tour of QuickFill

The nonaudit demonstration database

The Tour

By now you’ve installed your complete QuickFill system and demo databases. (The demonstration databases are automatically set up when you install QuickFill.) So let’s get started.

Note: creating or refreshing the demonstration database

During your QuickFill installation, three backup files, Demo_Original_Database.ZIP, Demo_Starter_Kit_Database.ZIP, and AuditDemo_Original_Database.ZIP, were placed into your QuickFill program directory (\QFW). These files contain the nonaudit and audit demonstration databases. To create a fresh copy of a demonstration database, simply restore the original database to the appropriate directory (\QFW\DEMO) using the Demo_Original_Database.ZIP file or the Demo_Starter_Kit_Database.ZIP file if you have the starter kit system. (See chapter 6, File commands, p. 6.9, for more information on restoring a “zipped” database.)

You can start the tour by clicking on the QFW Demo icon on your desktop. If you do not have this icon on your desktop, click on the Windows ‘Start’ button and select ‘Programs’, ‘QuickFill’, ‘QuickFill’. Once QuickFill is running, you can access the demonstration database by selecting ‘File’, ‘Open’, selecting the DEMO folder, and opening one of the database files (DEMO_?01.QFDAT, DEMO_?02.QFDAT,...,DEMO_?11.QFDAT where “?” represents the QuickFill version letter).

Note: exiting QuickFill

You probably won’t be “leaving” QuickFill for a while. However, when you’re ready to leave, make sure that you close QuickFill properly. You can do this by selecting ‘File’, ‘Exit’ from the main menu, clicking on the close button (the button with a “X”) in the top right corner. Make sure that you don’t turn off your computer, until you’ve closed QuickFill. If you do turn off your machine without “quitting” as we just described, there’s a chance that any database you’re using—including the demo databases you just installed—may become unusable. If this happens, QuickFill won’t let you reenter the database, until you’ve “restored” it from a backup copy. However, in the case of the demo databases, you can restore the backup demo database files (Demo_Original_Database.ZIP for the nonaudit system, Demo_Starter_Kit_Database.ZIP for the starter kit system, and AuditDemo_Original_Database.ZIP for the audit system) and you’ll be all set.
Tour of QuickFill

The nonaudit demonstration database

Selecting menu options

The instructions throughout this tour involve the selection of menu options. You can select a menu option by clicking on it or by pressing the Alt key and then pressing the key for the underlined letter in the menu item. (For example, to select ‘Definitions’ from the main menu, you can either click on ‘Definitions’ or press Alt-D.) See chapter 2, Basics, for more details on the basics of using QuickFill.

The main menu

You can see listed across the top of the screen ten headings: ‘File’, ‘Edit’, ‘Transactions’, ‘Definitions’, ‘Updates’, ‘Reports’, ‘Accounting’, ‘Other’, ‘Jobs’, and ‘Help’. These headings, or options, make up QuickFill’s main menu. You must select one of them to do any work in QuickFill. Just below the items on the main menu, you’ll see a toolbar with shortcuts to some of the menu items that are most frequently used.

Using your mouse move around through the menu items. Take a few moments to read through all the options that appear on the submenus. (All the main menu headings have submenus.) When you’re done, you will be ready to learn about the basics of QuickFill and the ‘Lookup’ transaction. These sections give you the general information you need to work with QuickFill. Feel free to experiment as you read.

Next we’ll take a look at some definitions and transactions, run the ‘Issue labels’ update, and run some reports. We’ll also explain how you can print reports, labels, bills, and other items. You should have QuickFill running with the demo database. If you don’t, please start it now by selecting ‘Open’ from the ‘File’ menu, clicking on the DEMO folder, and then double clicking on one of the DEMO data files (DEMO_01.QFDAT, DEMO_02.QFDAT,… DEMO_11.QFDAT where “?” represents the QuickFill revision letter).

To start, we’re going to run a ‘Credit balance’ report. Go to ‘Reports’, ‘Accounting reports, and select ‘Credit balance’. We want to run this report for all publications so you don’t need to make any changes to the filter. Simply click on “OK,” select the “Run it now” option, and then click on “OK” to run the report. QuickFill displays a progress box as the report runs. When it’s done, “Print,” “Preview” and “Close” buttons are displayed. We’re not going to look at this report until later so let’s click on “Close.” (QuickFill saves the report in the ‘Reports’ tab of the ‘Print Saved Reports’ screen.) Once the progress box closes, close the report screen. Now we’re ready to explore some definitions.
Definitions

The items on the ‘Definitions’ menu allow you to tailor QuickFill to the needs of your own business. Now let’s take a closer look at some of these items.

Publications

Select ‘Publications’ on the ‘Definitions’ menu. You’ll see a box that lists the two publications—AIC and QWKFIL—in the demo database. Running along the bottom of the screen, you’ll see “New,” “Change,” “Replicate,” and “Delete.” You can select one of these options by clicking on it.

Use the mouse pointer to select QWKFIL and then click on “Delete.” You’ll see this message: “You cannot delete a publication that has subscriptions linked to it.” In other words, QuickFill won’t let you delete QWKFIL, because customers are still subscribing to it. Click on “OK” to this message and then click on “Change.” You’ll see a screen that looks like the one below.

![Publications Screen]

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Tour of QuickFill

Definitions

Take a moment or two to look through the publication definition tabs. You can move back and forth between the tabs by either clicking on the tab at the top of the screen or pressing the Ctrl-RightArrow and Ctrl-LeftArrow keys. For example, to display the publications definition renewal tab, you can click on the 'Renewal' tab or hold down the Ctrl key and press the RightArrow key twice.

As you can see, the publication definition tabs are used to set most of the subscription fulfillment policies that govern a particular publication. By carefully filling in the fields on the “Publications” definition screen and all of the other definition screens, you are customizing QuickFill to suit your own policies and procedures. Once you’ve defined these policies, QuickFill automatically applies them. Of course, at times you’ll want to override a policy to meet the needs of a specific situation. As we’ll see below, that’s easy to do.

Let’s change one of the policies for this publication. Click on the ‘Billing’ tab. Notice how the “First bill” section is set so that the first bill will not be generated until three days after the first issue (the number “3” is in the ‘Send first bill ___ days after first issue’ field and the button next to this field is filled in). As the policy stands now, QuickFill will wait at least three days between the date it produces the first issue label for a new unpaid order and the date it generates a first bill for that order.

Since we’re going to enter orders, then run issue labels and bills, let’s eliminate this three-day billing delay. That way, we’ll get to see the bills for the orders we enter when we run the billing update. So enter “0” (zero) in this field in place of the “3.” If you used the Tab key to get to this field, you did not have to delete the “3” first. Since the “3” was highlighted, simply typing “0” automatically replaced the “3.”

Click on “OK” now and you’ll save the version of the QWKFIL publication you just changed and return to the list of two publications. (For more details on publications, refer to “Definitions menu,” “Publications” in the table of contents for QuickFill’s built-in help system.) Now close the “Publication” definition screen.

Billing series

Go to the ‘Definitions’ menu, select ‘Billing’, and then select ‘Series’. You should now be looking at a screen that has four items listed: lines labeled “CMB001 Combo Billing – First test series,” “GFTACK Gift acknowledgement billing series,” “GIFT Gift billing series,” and “STD Standard billing series.” Click on the “STD” billing series and then click on “Change.” You’ll see a screen that looks like the one on the following page.
Again, take some time to read through this screen.

What exactly is a billing series? Every order—whether it is a new order or a renewal—is linked to a billing series. By defining this series, you tell QuickFill:

- how many bills you want to send a subscriber;
- whether or not a combination bill (or single bill) should be produced for unpaid orders with the same order date, bill-to and ship-to information, purchase order number (if any), and billing series;
- at what point during the billing process (if at all) you want to suspend sending issues;
- how many days you want to elapse between bills;
- who should receive each of the bills—the bill-to customer or the ship-to customer;
- what messages you want to appear on each of the bills;
- with which “package”—that is, inserts, envelopes, and so forth—you want to mail each bill;
- when you want QuickFill to cancel an order automatically for nonpayment.
Tour of QuickFill

Definitions

Let’s go through each field on this ‘Billing series’ definition screen and see what it means.

Efforts tab:

Billing series code and description
You assign a billing series code and description when you define or edit a series. You’ll see the code and description whenever you see a billing series selection box (like the one you saw on the ‘Billing’ tab of the publication definition). You can also see the billing series code and description when you use ‘Lookup’ to view a customer’s order.

If you check this box QuickFill will attempt (during the ‘Billing update’) to link together orders with the same billing series, order date, purchase order number and billing address so that they can be billed together on a single invoice. For more details on combination billing, please refer to QuickFill’s built-in help system.

The four fields in this section of the screen determine the first bill policy for orders linked to a series. During order entry, the first bill policy set here will take precedence over the first bill policies defined in the offer and publication definitions.

Select ‘Immediately’ if you want to send the first bill the next time you run the ‘Billing’ update, even if you haven’t sent any issues. QuickFill ignores this field for renewals.

Select ‘Days after first issue’ and enter the number of days after the first issue that you would like to send the first bill. When you enter a number other than 0 in this field, QuickFill gives you a built-in delay before you mail the first bill. Usually, you select this option if you want to ensure that the customer receives the first issue of a new order before he or she gets the bill. If you don’t want this delay, enter 0. Even if you specify no delay by entering a 0, QuickFill will not produce bills for new orders until you run the ‘Issue labels’ update that produces the first label (and presumably you’ve served the first issue). You can change this field at any time. Only orders you enter after the change are affected. QuickFill ignores this field for renewals.

Note: delaying bills for renewal orders
If you would like send bills for renewal orders only after the first issue of a renewal order has been served, check the ‘Delay the billing of renewal orders until their first issue has been served’ field on the ‘Billing’ tab of your publication definition.

When the ‘Delay the billing of renewal orders until their first issue has been served’ field is checked and an “earliest bill date” is specified (in the definition of the offer selected for a renewal order), QuickFill will not produce a bill for the renewal order until its first issue has been served and the earliest bill date has been reached.
Select ‘Earliest date’ and enter a date on or after which you would like the ‘Billing update’ to produce the first bill for a new or renewal order. (For new orders, you will not get a bill unless you have served an issue.)

Select ‘Use billing control from offer or pub’ if you would like the first bill for an order to be sent based on the policy defined in the offer or publication definition. This field cannot be selected for billing series that are used for combination billing. In addition, when using this field, keep in mind that the first bill policy defined in an offer definition will take precedence over the policy defined in a publication definition.

In this field, you see the code for a billing package that we’ve already defined on another screen. The billing package is used to tell QuickFill the contents of the package that make up a bill (e.g., the form you’ll use, the envelope, and the letter or other enclosures). For this billing series, we’ve decided to use a package named “STNDRD” for each of the first three billing efforts and a package named “LAST” for the fourth effort. Move your cursor to “STNDRD”—the code for the package we’re using for the first billing effort in this series. Notice the arrow that appears to the right of the field.

To see the list of packages you could enter in this field, click on the arrow or right click once in the field and select ‘Pick package’. When you do this, you’ll see a box pop up on the screen with its own cursor. This box contains all the billing packages we’ve defined. The box displays 12 lines at a time. If there are more than 12 choices, you can “scroll” through them. Press Esc now to remove the box from your screen.

The number you enter here controls the number of days that will elapse between bills. Here’s an example:

Let’s say QuickFill produces the first bill for a new order on September 1. The ‘Days until next bill’ field on the first line of the billing series we’re looking at contains the number “27.” You run the billing update for this publication twice each week. When you run the update on September 27, QuickFill won’t produce a second bill. That’s because only 26 days have passed since it produced the first bill. September 28 is the earliest that QuickFill will generate our second bill.

The typical subscription involves only one customer. And this one customer, of course, is both the “bill-to” and the “ship-to.” We refer to this “one customer” subscription as a single subscription. But you can also have two other types of subscriptions: two-party and group.

A two-party subscription has both a bill-to and a ship-to customer. Only the ship-to receives issues.
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A group subscription involves two or more customers who are receiving issues. One group member is designated as the bill-to. This bill-to customer always receives bills. (QuickFill allows you to send renewal notices—not bills—to the ship-to.)

Since the bills always go to the bill-to for group subscriptions, your entry in this field affects only the billing of two-party subscriptions. If you would like bills for two-party subscriptions to go to the ship-to, you check the ‘Send to ship-to’ field by clicking on it. If you would like bills to go to the bill-to, leave this field blank.

When bills are sent to the bill-to address, QuickFill can create standard forms or long forms. The major difference between standard forms and long forms is that the long forms list all of the ship-to customers in a gift or group subscription. To see a sample of each of these forms, refer to “About,” “Sample bill and renewal forms” in the table of contents for QuickFill’s built-in help system.

QuickFill lets you print up to two messages on each bill. Each message can consist of up to four 40-character lines.

As we saw earlier, right clicking once and then selecting the “Pick…” menu item allows you to select from a list of predefined values. What happens if the value you want to use hasn’t been predefined? QuickFill usually allows you to define it “on the fly.”

Right now, we have no 2nd messages defined for our STD series. Say, however, that you want to add a second message to the fourth bill of this series. Here’s how you do it:

Right click in the ‘2nd message’ field on line 4 (to the right of the words “FINAL INVOICE...”) and select “New message.” Type any message you want, and click on “OK” when you’re done. Your message appears on line 4 (or at least as much of your message as fits on a single-line display). QuickFill now stores this message, and you’ll see it whenever you right click in a ‘Message’ field.

What do you do if you want to edit a message that you’re already using for a series? Just right click on the message you want to change and select “Change message.” Do this now. A box containing the full text of the message pops up on the screen. Make any changes you want, and click on “OK.” QuickFill stores this edited message, and it replaces the version you changed wherever that version was used.

That brings us to a very important point: Whenever you edit a definition—either as we did above or by using the “F3” key—the edited version replaces the original version everywhere QuickFill uses it. In the example above, the
message you edited may have appeared on other bills or on one or more renewal notices. Now your edited message will replace the original in all these places.

Suspend at effort
In this field, you tell QuickFill how many bills you want to send a customer before you stop sending him or her issues. In this case, we’ve decided to cut off issues after we send subscribers their third bill and they still have not paid. If you do not want to stop sending issues, you’d leave this field blank. You can’t enter a number in this field that is larger than the number of the last effort in your billing series. (An effort is simply the bill number you’ve sent—the first bill is effort number one, the second bill is effort number two, and so forth.) To see what we mean, go to the ‘Suspend at effort’ field and enter “6.” Now click on “OK.” As you can see, QuickFill won’t allow you to enter “6,” since there are only four efforts in the series. Now, click on “OK” to the warning message on the screen and then change the number in this field back to “3.”

Format tab:

Print publication name…
QuickFill lets you specify whether or not you want to print your publication’s name on your bills. (For a sample bill that contains the publication name on the top and bottom portions, refer to “About,” “Sample bill and renewal forms,” “Standard bill” in the table of contents for QuickFill’s built-in help system.) These fields apply to standard bills and mail-merge bills.

Document descriptors
In these fields, you tell QuickFill what document descriptors to print on your bills. The first line for document descriptors is used to specify the form title. (For example, you might use “SUBSCRIPTION INVOICE” as the form title.) This text appears on the top and bottom portions of a bill. The text “Please return this portion.” appears on the left side below the address block, and the text “FOR YOUR RECORDS” appears on the last two lines of a bill. Changes made to these fields do not apply to cancel bills. The document descriptors “SUBSCRIPTION INVOICE” (for periodicals) and “INVOICE” (for all other publication types) are used for cancel bills.

To save any changes you’ve made in this billing series, click on “OK” now. You’ll return to the “Defining Billing Series” selection box.

Now let’s define a new billing series by replicating the “STD” series. We’ll use this series for new gift subscriptions. To start, click on the “Replicate” button, enter “NEWGFT” in the ‘Billing series code’ field, and replace “Standard” with “New gift” in the ‘Description’ field.

The “STD” billing series was defined to create simple bills, but since we’re going to use this new series for gift subscriptions, we will define it to create detailed bills. Detailed bills include a list of the ship-to customers and are designed for printing on 8 ½” x 11” pages. (For more information on simple and detailed forms, refer to “About,” “Sample bill and renewal forms” in the
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Let’s go ahead and change this billing series so that it creates detailed bills. To do this, we’ll change the billing packages.

Right click in the first billing package field, select “pick package” from the menu, and then select “GIFT1.” Now let’s take a look at the definition for the “GIFT1” billing package. Right click in the first billing package field again and select “change package” this time. You can see that ‘Print credit card info block on bill’ and ‘Detailed (for gifts and groups) (formerly called the long form)” in the ‘Bill format’ field have been selected. Now take a few moments to review the remaining fields on the screen. (If you would like to see a description for any of the fields, press “F1” to display help for the billing package screen.) When you’re done, click on “OK” to return to the billing series definition.

Once you’re back at the billing series definition, you should see the code for your new package in the first billing package field. Now change the rest of the billing efforts to use the corresponding gift packages (e.g., “GIFT2” for billing effort 2, etc.). To do this, right click in the package field, select “pick package” from the menu, and move the cursor to the appropriate package.

You can leave the remaining fields as they are, but you may want to define new messages as practice. (We recommend that billing series that produce long forms contain at least one message with instructions for making changes to the ship-to addresses or adding ship-tos as well as instructions to send the entire form back if changes are made.) When you’re ready to move on, click on “OK.”

Before looking at the renewal series definition screen, we are going to look at one more billing series. Let’s say we have decided to send order acknowledgements for all pre-paid gift subscriptions. To do this, we need to use a billing series that contains an effort with the messages and format we wish to use for our acknowledgements. (Order acknowledgements are produced by the ‘Order acknowledgements’ report found under ‘Reports,’ ‘Order reports.’)

Since we are going to send acknowledgements for our gift subscriptions, we can use the “GFTACK” billing series. Click on “Change” for this series to see how we’ve defined it. Notice that this series only has one effort. Only the information for the first billing effort is used when creating acknowledgements.

Now go to the ‘Format’ tab. We’ve replaced the document descriptors “SUBSCRIPTION INVOICE” with “ORDER ACKNOWLEDGEMENT” and have deleted “Please return this portion.” (For more information on billing series, refer to “Definitions menu,” “Billing,” “Billing series” in the table of contents for QuickFill’s built-in help system. Or, for an overview of billing definitions, refer to “Definitions menu,” “Billing,” “Overview of billing definitions” also in the table of contents.) When you’re done looking at the gift
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Renewal series

Go to the ‘Definitions’ menu, select ‘Renewal’, and then select ‘Series’. You should now be looking at a screen that lists five renewal series: “STDAIC,” “GIFT,” “ISSUE,” “STD,” and “STD-03.” This screen also lists the publication code associated with each renewal series (because renewal series, unlike billing series, are publication specific), the description for each series, and the series’ type. If a renewal series is “by days” QuickFill controls the sending of notices based on the number of days since a notice was last sent. If a renewal series is “by issues” it controls the sending of each notice by the number of issues remaining in the subscription.

Now we are going to take a look at QWKFL’s “STD” renewal series; this is a “by days” series. Click on the “STD” renewal series and then click on “Change.” You’ll see a screen that looks like the one below.

![Renewal Series Screen]

What exactly is a renewal series? Every order—whether it is a new order or a renewal—is linked to a renewal series. By defining this “by days” renewal series, you tell QuickFill:

- how many renewal notices you want to send a subscriber;
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- how many days you want to elapse between renewal notices—for “by days” renewal series;
- how many issues should be remaining when each notice is sent—for “by issues” renewal series;
- who should receive each of the notices—the bill-to customer or the ship-to customer;
- what messages you want to appear on each of the notices;
- what offers you want to appear on each of the notices.
- with which “package”—that is, inserts, envelopes, and so forth—you want to mail each notice;
- whether orders that use this series should be automatically renewed.

Let’s go through each field on this ‘Renewal series’ definition screen and see what it means.

Links tab:

Publication

When you define a renewal series you must specify the publication for which it will be used. Renewal series are publication specific because they determine the offers that will be included on renewal notices; these will be the same offers that are listed on the renewal order screen when you enter renewals.

Renewal series code and description

You assign a renewal series code and description when you define or edit a series. You’ll see the code and description whenever you see a renewal series selection box (like the one you saw on the ‘Renewal’ tab of the publication definition). You can also see the renewal series code and description when you use ‘Lookup’ to view a customer’s order.

Next renewal series

Say you receive a renewal order in response to one of the efforts you mailed from the “STD” series. When that renewal order nears its end, you’ll, of course, want QuickFill again to generate renewal notices. You use the ‘Next renewals series’ fields to tell QuickFill which renewal series to use for that regular or gift subscription.

QuickFill uses the renewal series entered in the ‘Next renewal series—Gifts’ field to produce the next set of renewal notices for orders that contain a “G” in the ‘Gift/Comp’ field. If you don’t treat gifts differently, you can enter the same series in both the ‘Next renewal series—Regular’ and the ‘Next renewal series—Gifts’ fields. (For more information on gift subscriptions, refer to “Transactions menu,” “New Orders,” “Gift subscriptions” in the table of contents for QuickFill’s built-in help system.)

When you define a new renewal series, these fields default to “Same renewal
series.” and QuickFill automatically uses the series being defined as the next renewal series for regular and gift orders. You can, however, use a different next renewal series by right clicking in each field and selecting from a list of series that you’ve previously defined.

**Next billing series**
Say you receive an unpaid renewal order in response to one of the efforts you mailed from this series. You use this field to tell QuickFill which billing series to use for that regular or gift order.

QuickFill uses the billing series entered in the ‘Next billing series—Gifts’ field to produce invoices for unpaid renewal orders that contain a “G” in the ‘Gift/Comp’ field. If you don’t treat gifts differently, you can enter the same series in both the ‘Next billing series—Regular’ and the ‘Next billing renewal series—Gifts’ fields. (For more information on gift subscriptions, refer to “Transactions menu,” “New Orders,” “Gift subscriptions” in the table of contents for QuickFill’s built-in help system.)

When you define a new renewal series, you must enter a series in each of the ‘Next billing series’ fields. You can do so by right clicking in each field and selecting from a list of series that you’ve previously defined.

**Agency subscriptions**
Renewal notices for agency subscriptions may be sent either to the subscriber or to the agency. If you send the notices to the agency, they will show the agency discount. If you send the notices to the subscriber they will not show the agency discount.

**Auto renewal**
The two ‘Auto renewal’ fields allow you to specify whether orders that use this series should be automatically renewed and, if so, whether the credit card number from those orders should be used for the renewal order. (For more information on automatically renewing orders, refer to “Automatically,” “Renew a subscription” in the index for QuickFill’s built-in help system.)

**Gracing**
Check the ‘Do not send grace issues to orders that use this renewal series’ box and QuickFill will not send any post-expiration or “grace” issues to subscriptions that are linked to this renewal series. Normally QuickFill will send grace issues as long as the term of the order is longer than the minimum specified on the publication definition screen. This lets you send grace issues to regular full-year subscriptions but not to short term trials. In some situations you may have full-year subscriptions that should not receive grace issues—in that case you may find this policy setting useful.

**Efforts (by days) tab:**

**Start series...**
These fields are used to tell QuickFill when to generate the first renewal notice for an order. Once a ‘by days’ renewal series begins, the timing of the
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remaining efforts is controlled by the entries in the ‘Days until next effort’ fields (described on the following page).

For publications that are published infrequently—such as quarterly—it’s usually not enough to tell QuickFill the number of issues remaining before it should start generating renewal notices. For those publications, you can specify a number of days that you want QuickFill to wait before generating renewal notices. You measure the number of days it should wait from the date you serve the last issue before the series will start.

Example: You have a quarterly publication with January, April, July, and October as issue dates. You want to mail the first renewal notice to subscribers whose order expires with the October issue in September. So you enter: “Start series when 1 issues remain but not sooner than 60 days after last issue.”

The following fields are repeated, once for each effort in the series. You can have from one to twelve efforts. When you’re entering information for each of these efforts, fill in each line in order. Don’t skip any lines.

In these fields, you see the codes for renewal efforts that we’ve already defined on another screen. Move your cursor to “REN_A”—the code for the first effort in this series. Notice the arrow that appears to the right of the field.

To see the list of efforts you could enter in this field, click on the arrow or right click once in the field and select ‘Pick effort’. When you do this, you’ll see a box pop up on the screen with its own cursor. This box contains all the renewal efforts we’ve defined. Press Esc now to remove the box from your screen.

Effort codes are important because they determine the offers and renewal packages that will be used for your renewal notices. To see this information for effort “REN_A,” right click in the ‘Effort code’ field and select “Change effort.” You can see that the standard renewal package for effort one will be used when creating notices for this effort. (The renewal packages definition screen contains some of the same fields that you saw on the billing packages definition screen.) You can also see the three offers that will be printed on the renewal notices for effort one.

If you would like to see more information on the renewal effort definition screen, press “F1” now. Otherwise, click on “Cancel” to return to the renewal series definition screen.

If you never want to send renewal notices for this series, you may leave all of the renewal efforts blank. You might want to do this if all of your renewal efforts are sent out on an ad-hoc basis. However, if you do this, you should be aware that the renewal reports will not be able to produce any meaningful statistics on the effectiveness of the individual renewal efforts.
Once you’ve started sending renewal notices from a “by days” series, QuickFill uses the number you enter in this field to determine the earliest date it will generate the next renewal effort in the series.

For example, let’s say that QuickFill generates the first renewal notice for an order on September 1, you’ve entered “27” in the ‘Days until next effort’ field on line 1 of the renewal series definition screen, and you run the ‘Renewal notices’ update for this publication twice a week. When you run the ‘Renewal notices’ update on September 27, QuickFill won’t generate a second renewal notice for the order because only 26 days have passed since it produced the first renewal notice. But on September 28, it will generate the second renewal notice. In fact, this date is the earliest it will generate the second renewal notice.

This field is used to specify whether you want to send notices to the ship-to address of two-party and group subscriptions. If you want to send the renewal notice to the bill-to address of two-party or group subscriptions, leave this field blank. If you want to send the renewal notice to the ship-to address, check this field.

When notices for gift or group subscriptions are sent to the bill-to address, QuickFill can create standard form renewal notices or long form renewal notices. The major difference between standard forms and long forms is that the long forms list all of the ship-to customers in a gift or group subscription. To see a sample of each of these forms, refer to “About,” “Sample bill and renewal forms” in the table of contents for QuickFill’s built-in help system.

In the case of a group subscription where renewal notices go to the ship-to addresses, each ship-to receives a renewal notice with the price of the renewal based on the number of copies that ship-to was receiving.

Here’s an example of how you can use these fields. You can send the first few notices to the bill-to address. If that person doesn’t respond, check this field, and QuickFill will send individual renewal notices to each ship-to.

This field has no effect on the renewal notices for a single subscription.

QuickFill lets you print up to two messages on each renewal notice. Each message can consist of up to four 40-character lines. These fields work the same as the message fields on the billing series definition.

As with the billing series we looked at, this renewal series has no 2nd messages defined. Take a minute or two now to define a few messages in the ‘2nd Message’ fields. To do so, right click in a ‘2nd message’ field and select “New message.” Type in any message you want, and click on “OK” when you’re done.
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What do you do if you want to edit a message that you’re already using for a series? Just right click on the message you want to change and select “Change message.” Do this now. A box containing the full text of the message pops up on the screen. Make any changes you want, and click on “OK.” QuickFill stores this edited message, and it replaces the version you changed wherever that version was used.

Once again, this brings us to a very important point: Whenever you edit a definition—either as we did above or by using the “F3” key—the edited version replaces the original version everywhere QuickFill uses it. In the example above, the message you edited may have appeared on other bills or on one or more renewal notices. Now your edited message will replace the original in all these places.

Format tab:

Print publication name… QuickFill lets you specify whether or not you want to print your publication’s name on your renewal notices. (For a sample renewal notice that contains the publication name on the top and bottom portions, refer to “About,” “Sample bill and renewal forms” in the table of contents for QuickFill’s built-in help system.) These fields apply to standard notices and mail-merge notices.

Print purchase order number… You can also specify whether you want to include the purchase order number, for the orders you are trying to renew, on your notices.

Document descriptors In these fields, you tell QuickFill what document descriptors to print on your notices. The first line for document descriptors is used to specify the form title. (For example, you might use “SUBSCRIPTION RENEWAL” as the form title.) This text appears on the top and bottom portions of a renewal notice. The text “Please return this portion.” appears on the left side below the address block, and the text “FOR YOUR RECORDS” appears on the last two lines of a notice.

To save any changes you’ve made in this renewal series, click on “OK.” You’ll return to the “Defining Renewal Series” selection box.

Now let’s define a new renewal series by replicating the “STD” series. We’ll use this series for our new gift subscriptions. To start, click on the “Replicate” button, enter “NEWGFT” in the ‘Renewal Series’ field, replace “Standard” with “New gift” in the ‘Description’ field, and change the ‘Next Billing Series—Gifts’ field to use the “NEWGFT” billing series you defined earlier. Now go to the ‘Efforts (by days)’ tab and replace the effort codes with efforts “GREN1” through “GREN6.” When you’re done, you can see the offers and packages being used for any of the gift renewal efforts by right clicking in the effort field and selecting “change effort.” To get back to the renewal series definition after looking at a renewal effort, click on “Cancel.” You can leave the remaining fields as they are, but you may want to define new messages as practice. (Remember, if you get stuck at any point, press “F1” and QuickFill will display
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help for the screen you’re on.) When you’re ready to save the renewal series, click on “OK.”

Now that we’ve defined a new gift billing and renewal series, let’s change both the “STD” and “STD-03” renewal series for QWKFIL so that they use the new gift series. To do this, click on the “STD” series for QWKFIL and then click on “Change.” Once the renewal series definition screen appears, right click in the ‘Next Renewal Series—Gifts’ field and select the “NEWGFT” series. Then right click in the ‘Next Billing Series—Gifts’ field, select “Pick billing series,” and select the “NEWGFT” series. Once you are done, click on “OK.” Repeat these same steps for QWKFIL’s “STD-03” renewal series. (For more details on renewal series, refer to “Definitions menu,” “Renewal,” “Renewal series” in the table of contents for QuickFill’s built-in help system. Or, for an overview of renewal definitions, refer to “Definitions menu,” “Renewal,” “Overview of renewal definitions” also in the table of contents.)

Now close the renewal series definition screen and we’ll move on to tracking codes.

Tracking codes

The key to the usefulness of the QuickFill system is the tracking code. Every new order you enter into QuickFill must have a tracking code. Depending on how completely you fill in the ‘Marketing’ definitions, the tracking code can identify the following elements of your promotion:

- the name of the overall marketing plan you used to get an order;
- the name of the list you used;
- the contents of the package you used;
- the channel (mail, telemarketing, Internet, etc.) used to obtain an order;
- the price, term, and premium combinations you offered.

Nearly all publishers use some form of code to identify new orders. The code may contain a lot of information or it may contain very little—just the list from which the order came, for example. Even the name of this code varies from one publisher to another; some call it a source code, some a promo code, and so forth. Because the primary purpose of this code is to allow you to track what’s happening with your promotions and orders, we call it a tracking code.

A tracking code lets you link the components that make up a promotion in one definition. It also lets you specify which billing and renewal series you want to use and whether subscriptions that use a particular tracking code should be coded as gift or complimentary subscriptions. Ideally, you should have a tracking code printed on every promotional piece you use. It is this unique
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code that identifies the promotional piece. Moreover, most of the reports use data that QuickFill gets from the tracking code.

The bottom line? If you define your tracking codes properly and are conscientious about printing them on every order form you use, you can get extremely useful reports on the effectiveness of your various marketing efforts.

Now let’s take a look at a tracking code definition. Go to the ‘Definitions’ menu, select ‘Marketing’, and then select ‘Tracking codes’. You should now be looking at a screen that lists a number of tracking codes and “New,” “Change,” “Replicate,” “Delete,” “Find,” and “Find Again” buttons. QuickFill sorts this list first alphabetically by the plan code. Within the plan, it sorts by list code, then by the publication code, and, finally, by the tracking code. QuickFill sorts in this way so that you can see, as one group, all the tracking codes you defined for a particular plan.

We are going to take a look at the “DRIFT” tracking code for the publication “QWKFIL.” Click on “Find.” Then enter “QWKFIL” for the publication and “DRIFT” for the tracking code and click on “OK.” Once the cursor moves to the tracking code we want to look at, click on “Change” to see its definition. You should see the screen below.

When you define a tracking code you must specify the publication for which it will be used. Tracking codes are publication specific, but, if you have many
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publications, you can use the same code for more than one publication. This means that you can use the same standard codes for special cases, such as WM for “white mail,” COMP for “complimentary,” and GIFT for “gift subscriptions.”

Tracking code and description

You assign a code and description when you define or edit a tracking code. You’ll see the code and description whenever you see a tracking code selection box. You can also see the tracking code and description when you use ‘Lookup’ to view a customer’s order.

Billing series...

If you want new regular or gift orders that you enter with this tracking code assigned to a billing series other than the default series you specified on the ‘Billing’ tab of the publication definition, you can specify that billing series in these fields. (If you enter a ‘G’ in the ‘Gift/Comp’ field on the new order form, QuickFill will use the billing series in the ‘Billing series for gifts’ field for the order you are entering.) We can see that the default series for QKWFIL is being used for both regular and gift subscriptions entered with the “DRIFT” tracking code.

Since we have a couple of billing series for gift subscriptions, let’s right click in the ‘Billing series for gifts’ field, select “Pick billing series,” and then select the “GIFT” series.

Renewal series...

If you want new regular or gift orders that you enter with this tracking code assigned to a renewal series other than the default series you specified on the ‘Renewal’ tab of the publication definition, you can specify that renewal series in these fields. (If you enter a ‘G’ in the ‘Gift/Comp’ field on the new order form, QuickFill will use the renewal series in the ‘Renewal series for gifts’ field for the order you are entering.) We can see that the default series for QKWFIL is being used for both regular and gift subscriptions entered with the “DRIFT” tracking code.

Since we have a couple of renewal series for QKWFIL’s gift subscriptions, let’s right click in the ‘Renewal series for gifts’ field, select “Pick renewal series,” and then select the “GIFT” series.

List, Package, Channel, Marketing plan

These fields are used to specify the list, package, channel, and plan associated with a tracking code. You don’t have to link a tracking code to any of these items but we recommend that you do so. Here’s why. By including them on your tracking code, you can request that QuickFill sort your orders by list, package, channel, or plan when you run several of the reports. Then you can see which lists, packages, channels, or plans were most effective.

Since the tracking code we are looking at was created for drift orders, there is no list or package associated with it. However, as you can see, we did associate this tracking code with a channel and a plan that we created for miscellaneous and complimentary subscriptions. This allows us to produce reports that
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include/exclude orders with the “DRIFT” tracking code. If we link all tracking
codes used for miscellaneous and complimentary subscriptions to the same
channel or plan as the “DRIFT” tracking code, we can easily produce reports
that include/exclude all miscellaneous and complimentary orders.

**Date mailed**
When you have a tracking code that is associated with a direct mail promotion,
you can enter the date the promotion was mailed in this field. If the code is
associated with an advertisement, you enter the date the advertisement ran. If
it is associated with a telemarketing campaign, you enter the date on which the
calling began. QuickFill prints this date on the ‘New order analysis’ and ‘New
order revenue’ reports.

**Expiration date**
This field is used to prevent the entry of orders with old—and obsolete—
subscription rates. If a date is entered in this field, QuickFill won’t let you enter
orders with this tracking code, once that date is past.

**Quantity requested**
These fields are used to record the number of direct mail pieces with this
tracking code that you originally intended to mail and the number actually
mailed. QuickFill prints the number mailed on the ‘New order analysis’ and
‘New order revenue’ reports and uses it to calculate the percentage of
responses. The number requested is for your information only. QuickFill
doesn’t use it.

**Quantity mailed**
QuickFill automatically fills in this field whenever you select or change a
marketing list or package from within the tracking code definition. You can
also override the calculated value by typing directly into this field. The amount
in this field is reported in the ‘New order revenue’ report.

**Cost per thousand**
This field is used to identify tracking codes as being used for gift,
complimentary, or regular subscriptions. Since we are using the “DRIFT”
tracking code for regular subscriptions, this field is set to the default of
‘Normal’.

**Type**
The last offer listed for this tracking code is for zero issues. This
offer is used for per-issue pricing. Therefore, if we receive a drift order for 10
issues (none of the offers linked to our tracking code are for 10 issues),
QuickFill will calculate a price of $100 ($10 multiplied by 10 issues).

**Offers**
You can include up to five different offers on one tracking code. When you
enter an order, QuickFill knows which offer to use because you also specify a
specific term and quantity for the order.

Notice how the last offer listed for this tracking code is for zero issues. This
offer is used for per-issue pricing. Therefore, if we receive a drift order for 10
issues (none of the offers linked to our tracking code are for 10 issues),
QuickFill will calculate a price of $100 ($10 multiplied by 10 issues).

To see a list of the offers that may be linked to the “DRIFT” tracking code, right
click in this field and select “Pick offer.” You can also create a new offer by
selecting “New offer;” change an existing offer by selecting “Change offer” (be
very careful when using the “Change offer” option as the definition of the offer
will be changed in every place that it is used); or remove an offer from the
tracking code definition by selecting “Clear.”
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Discount for prepayment

If you give a discount for orders received with payment, you can enter the amount of the discount in one of these two fields. You can express the discount as either a dollar amount or as a percentage. The dollar amount discount is calculated on a per-copy basis. If a customer orders a gift subscription to be sent to two addresses, then he or she will receive twice the amount of the “in dollars” discount.

To save any changes you’ve made in this tracking code, click on “OK.” You’ll return to the “Defining Tracking Codes” selection box. (For more details on tracking codes, refer to “Definitions menu,” “Marketing,” “Tracking Codes” in the table of contents for QuickFill’s built-in help system. Or, for an overview of marketing definitions, refer to “Definitions menu,” “Marketing,” “Overview of marketing definitions” also in the table of contents.) Now close the tracking code definition screen.

If you want to take a break, now is a good time to do it. We have a lot of information to cover in the next section, “Transactions.” Remember, to exit from QuickFill, close any open QuickFill screens, go to the main menu and select ‘File’, ‘Exit’ before turning off your computer.
Before you try out a few transactions, you should know something about how they work. So let’s quickly review them.

First, you should know that the four most common types of transactions—new orders, payments, renewals, and prospects—are entered in batches. A batch is nothing more than a small bunch of transactions that you group by common features. So, for example, a batch might include a group of 20 orders to QWKFIL with a subscription term of 12 months. Entering these transactions in batches helps give you greater control over what goes into your database. That’s because, as you’ll see, you don’t “post” a batch until it’s in balance.

You enter all the other transactions—‘Cancel’, ‘Reinstate’, ‘Address change’, and so forth—individually. These transactions take effect as soon as you enter them. You don’t have to post them.

For reporting and record-keeping purposes, QuickFill groups these other transactions into a “miscellaneous batch.” It creates this batch as soon as you enter any transaction that is not a new order, payment, renewal or prospect. At the end of each day, you should close the miscellaneous batch by selecting ‘Close Misc Batch’ under ‘Accounting’ on the main menu.

Each time a batch is opened—either when you create a batch by entering new orders, payments, renewals, or prospects, or QuickFill creates a miscellaneous batch when you enter a miscellaneous transaction—QuickFill assigns a number to that batch. Batch numbers begin with 1 and go to 9999, before starting over again at 1. You should file all your paperwork by the batch number. That’s because this number appears in a customer’s subscription history and in the order detail screen you see when you use ‘Lookup’. So, if you’ve filed by batch number, it’s easy to locate paperwork for a particular transaction if you or a customer has a question later on.

QuickFill also includes batch numbers on reports. Every report includes the most recently assigned batch number at the top of the page. As long as you don’t have any unposted batches, you can tell whether or not your report includes the transactions from a specific batch.
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When you close a miscellaneous batch or post a batch of new orders, payments, renewals, or prospects, QuickFill automatically creates a **batch report** describing the transactions in that batch.

The first part of the report is a detailed transaction log. It shows you the types of transactions you entered and the amounts QuickFill posted to each of your general ledger accounts for those transactions.

You get part two of the batch report only if your batch included payments. This part of the report shows the customer, the payment type, the check or last four digits of the credit card number (if you entered one), the order number, the amount of each payment in the batch, and the total payments. This report makes it easier to fill out a bank deposit slip when you deposit your checks. Or your bank may allow you to use the report instead of a deposit slip.

You get part three of the batch report only for new order batches. This part contains a list of the names and addresses entered, the customer number, the terms of the subscriptions, the starting issue, shipping class, and amount due.

You can either print the batch reports immediately or print them later. You choose when you want to print these reports on the ‘Batch reports’ tab of the “Preferences” screen under ‘Definitions’.

Since you’ll be viewing or printing these batch reports shortly, we’re going to skip ahead and tell you how to do that next.

**Printing and viewing reports**

Click on the “Print” toolbar button—اريخ (or, select ‘Print…’ on the ‘Reports’ menu) and you’ll see a screen that looks like the one on the following page.
QuickFill has room for 500 reports of each type (i.e., 500 batch reports, 500 order history reports, 500 issue label files, etc.). As you create and save report and update files, you can scroll up and down through the list of items on the “Print Saved Reports” screen.

Reports include the batch reports we’ve just discussed; update reports; reports you created by selecting items under ‘Reports’; reports you created by selecting items under ‘Accounting’; and reports you created by selecting items under ‘Other’. (QuickFill displays all labels—issue labels, one-shot labels, renewal labels, etc.—on the ‘Labels’ tab. Bill, renewal notice, and order acknowledgements files are displayed on the ‘Forms’ tab. All mail-merge files that have a “csv,” “txt,” or “dbf” extension are displayed on the ‘Mail Merge’ tab.) You may want to save copies of some reports. As a rule, however, you should print, then delete, most of the reports.

QuickFill places all report and update files created in the DEMO database in your reports directory. This directory is specified on the ‘General’ tab of the “Preferences” screen under ‘Definitions’. (Usually the reports directory is a sub-directory of your database directory.) You can print these reports, view them on your screen, export them to a Microsoft Excel spreadsheet, or delete them.
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Now let’s try working with the report you see. With your cursor on the “Credit Balance Report” (the one we created on p. 3.4), click on “Preview” to view the report. You can view the report by using the “Next page,” “Prev page,” “Two page,” “Zoom in,” and “Zoom out” buttons. You can tell when a report has more than one page, because the “Next page” button will be accessible. To view two pages at a time, click on “Two page.” You can also print all or any part of the report by clicking on “Print” and then specifying the pages you would like to print. You can also click on “Close” to exit the ‘Print preview’ screen.

When you select “Preview” for the ‘Credit balance’ report, you will see the following screen:

| Name            | Subscribers                  | Quantity | Amount
|-----------------|------------------------------|----------|--------
| Mr. Kenneth Davis | QuickFill: Subscription Fulfillment Made Easy! | 2130     | 5.00   
| Linnet 590      |                             |          |        
| GREAT BRITAIN   |                             |          |        
| Total for sub:   |                             |          | -5.00  
| Ms. Annika Selberg | QuickFill: Subscription Fulfillment Made Easy! | 1670     | 3.40   
| J. Hopkins St.   |                             |          | 0.50 written off
| Villa Vale Halls |                             | 2053     | -11.00 
| SWEDEN           |                             |          |        
| Total for sub:   |                             |          | -11.00 

In this report, you can see the two demo database subscribers who currently have credit balances. The report displays the customer’s name and address, the publication name, and the individual orders that make up the subscription, excluding old orders with zero balances.

Experiment with buttons on the ‘Print preview’ screen to view this report. When you’re ready to leave the report, click on “Close” and you’ll return to the “Print Saved Reports” screen. To leave the “Print Saved Reports” screen, click on “Close.”

Now we’ll begin with the first miscellaneous transaction—‘Cancel’.

Cancel

Say that in today’s mail you received cancellation requests from three QWKFIL subscribers. How do you handle them? First you go to the “Lookup” screen. If you don’t already have a ‘Lookup’ screen open, click on the “Lookup” toolbar button—(or select ‘Lookup’ from the ‘Transactions’ menu). Before you select any of the miscellaneous transactions you need to use ‘Lookup’ to locate the customer, subscription, or order to which you want to apply the transaction.

When you select ‘Lookup’, you’ll see a screen that looks like the one on the following page:
You'll notice that the records in the customer list above appear in different colors. This is because we have used QuickFill’s color-coding feature so that we can easily identify customers whose records meet certain criteria. To see the criteria we have defined, go to ‘Definitions’, ‘Preferences’, and select the ‘Lookup’ tab.

You can see that we have set up color-coding so that the records for customers marked as “bad debt” (that is, customers who repeatedly order subscriptions but never pay for them) are displayed in red, records for customers who have at least one active non-zero priced subscription are displayed in blue, and records for all other customers are displayed in gray. To see a list of the colors that can be used, click on the arrow to the right of any of the ‘Color’ fields. To see a list of the criteria that can be used for color-coding, click on the arrow to the right of any of the ‘Characteristics’ field. You can change the colors and/or criteria at any time. You can also turn the color-coding off by simply changing the ‘Characteristics’ field for each color to “Not assigned.” Once you are done making changes, click “OK” to save them. To see your new color-coding scheme close your ‘Lookup’ screen and open a new one.

Important reminder:
In the sections that follow, you’ll be using QuickFill’s lookup capability extensively. So keep in mind that ‘Lookup’ uses the data at the top of the screen first. That is, if you have an entry in the ‘Zip/Postal code’
field, then enter an order number, QuickFill ignores the order number and looks up the zip. That means whenever you look up a customer or order, you should make sure that the fields above the data you’re providing for lookup are blank. To erase a field, simply use your cursor to highlight the contents of the field and delete them. You can also delete the entries by placing the cursor on the entry and pressing the “Delete” key until the entry has been erased.

Now let’s get to those cancellations.

Your first request comes from a Dr. Henry Jekyll. Dr. Jekyll has undergone a career change and would like to stop his subscription to QWKFIL immediately. He also mentions that he thinks he may be entitled to a refund. To execute Dr. Jekyll’s request, enter “Jekyll” (it doesn’t matter if you use upper- or lower-case letters) in the ‘Person’s name’ field and click on “Find.”

The cursor should now be on “Jekyll, Henry” in the “Customers by Name” list. Click on “Subscriptions” to “select” this customer. You should now see a “Subscriptions and Prospects Records” screen for Dr. Jekyll. The doctor has only one subscription—an active single subscription to QWKFIL with 5 issues remaining.

Click on the “Cancel” toolbar button—(or, select ‘Cancel’ from the ‘Transactions’ menu) and you’ll see a screen that looks like this:
Notice the “Subscription History” section in the middle of the screen. When you use the actual ‘Lookup’ procedure, you can scroll through the history, which is a record of every transaction for this subscription. We suggest that you return to Dr. Jekyll’s subscription in a later QuickFill session and take a look at it. You’ll see the effect of the cancel transaction you’re about to perform. Also, as you explore QuickFill further on your own, check the entries in the subscription history. You’ll find they’re quite useful for providing answers to most customer inquiries.

For now, let’s continue with the cancellation. Since Dr. Jekyll paid his bill in full and still has five issues to go, QuickFill asks whether you want to cancel this subscription “At the end of the term” or “Immediately” (with a refund or without a refund). You can also enter a code, if there are cancel reason codes defined in your database, to specify the reason for Dr. Jekyll’s cancellation. (If you use cancel reason codes in your database, you can use those codes as criteria on various report filters.)

Dr. Jekyll made it clear that he wants to stop receiving issues immediately and, as the doctor suspected, he is entitled to a refund for his unserved issues. So select the option to cancel the subscription immediately and issue a prorated refund (that is, a refund for the unexpired term) and click on “OK.”

QuickFill immediately processes the cancellation. You are left on the “Subscription History and Orders” lookup screen. Your cursor is on the order that was active at the time of the cancellation, and its status is now “Canceled by request.” Notice the entry that has been added to the subscription history. The amount of the refund, $53.75, is displayed.

Once you’ve finished looking at the order, click on “Back” until you return to the initial lookup screen.

Let’s continue with our other two requests for cancellations. The second request comes from a Mr. Sulu. Again, move the cursor to the ‘Person’s name’ field.

Erase the name “Jekyll,” type “Sulu,” and then click on “Find.” Your cursor should be on Mr. Sulu’s entry in the customer list. Now click on “Subscriptions” to go to the subscription list. You’ll notice that Mr. Sulu has only one subscription, and QuickFill already automatically suspended it for nonpayment. Select the ‘Cancel’ transaction.

QuickFill knows this customer has received issues for which he hasn’t paid. It also knows that your policy for this publication is to send “cancel” bills—that is, one final bill for the unpaid issues the customer has received. QuickFill asks if you want to issue a cancel bill or write off the amount due so that you have the opportunity to override the policy on a case-by-case basis. The option to
issue a cancel bill is selected by default so simply click on “OK” to complete the transaction.

Now click on “Back” until you return to the initial lookup screen, so we can cancel our last subscription for the day.

The customer who wants to cancel this order returned our bill with “CANCEL” written in large letters along the top half. It looks like this:

![Image of a cancel bill]

Erase Sulu’s name from the ‘Person’s name’. Then enter the order number “2764” (the “B3” that follows the order number in the above bill, indicates that this is bill number “3.”) in the ‘Number’ field and click on “Find.” The “Subscription History and Orders” lookup screen will be displayed for Nyota Uhura. Now select the ‘Cancel’ transaction, select the option to write off the amount due, and then click on “OK” so that you do not send a cancel bill. QuickFill will write off the cost of the issues that Nyota Uhura received, but did not pay for prior to canceling her subscription. To see the amount written off, click on the “Details” button and then look at the ‘Accounting’ tab. When
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you’re ready to continue, click on “Back” until you return to the initial “Lookup” screen.

Extension

We also received in today’s mail a complaint from a Ms. Becky Thatcher. Apparently, Ms. Thatcher did not receive the issue that was due her several months ago. She does not want us to replace that issue; she’d rather we extended her subscription by one issue to make up for the one she missed.

To comply with her request, move the cursor to the ‘Person’s name’ field, enter “That,” and click on “Find.” The cursor will move to “Thatcher, Becky” in the “Customers by Name” list. Click on “Subscriptions” to see the “Subscription and Prospect Records” screen for Ms. Thatcher. As you can see, Ms. Thatcher has only one subscription—an active single subscription to QWKFIL with 11 issues remaining. Select ‘Extension’ from the ‘Transactions’ menu.

You should now see a screen that looks like this:

Notice that the ‘Expires’ date in the top right-hand corner of the display is 10/05 and the ‘Issues remaining’ is 11. Enter 1 in the “Extension” box, and click on “OK.” QuickFill processes the extension immediately—notice that the issues remaining is now 12 and the expiration date is 11/05—and returns you to the “Subscription History and Orders” lookup screen. When you’re through, click on “Back” until you get to the initial lookup screen.
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Address change

We’ve received a request from a customer to change his or her address. Unfortunately, the post office managed to mangle the address-change form. We can read the new address just fine. The old address, however, is another story. It’s a mess. However, we can see that the old zip is 02109 and that the last name begins with “Rig.” So let’s see if we can locate the customer.

Enter “02109” in the ‘Zip/Postal code’ field, erase “That” from the ‘Person’s name’ field, and then click on “Find.” Since there seems to be only one customer with that zip code and the name seems to match, Eleanor Rigby must be the customer for whom we’re looking.

Now click on the “Address Change” toolbar button—(or select ‘Address change’ from the ‘Transactions’ menu).

You’ll see a screen that looks like this:

![Address Change Screen]

We see on the address-change form that Ms. Rigby’s new address is 123 Abbey Road in the same town as her old address. So move the cursor to the ‘Street’ line, use your mouse to highlight the entry in this field and then type in the new street address. If you have Semaphore Corporation’s ZP4 address correction and certification software (“ZP4” will be listed on the bottom right side of your screen), you can correct and certify addresses as you enter them into your database, by clicking on the “Address Lookup” button. Refer to “How to,” “Certify customer addresses” in the table of contents for QuickFill’s User’s Guide.
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built-in help system for more information on using ZP4 address correction and certification software with QuickFill.

Now either click on the ‘Subscriptions’ tab or press the Ctrl-RightArrow keys to move to the “Subscriptions” screen. Ms. Rigby has subscriptions to both our publications. QuickFill can apply the address change to all of a customer’s subscriptions or to only some of them. Let’s assume that Ms. Rigby wants all her subscriptions sent to the new address. Since check boxes for each publication are already marked, click on “OK,” and you’re done. Now look up each of Ms. Rigby’s subscriptions. Pay particular attention to the subscription history entry that was created by the address-change transaction. When you’re done, close the “Lookup” screen.

Now, we’ll explore the “batched” transactions.

Payments We’ve received three payments for existing orders in the mail. Two of these payments were returned with the top of our invoice, but the third came in an unmarked envelope. Luckily, the third check, which doesn’t have a preprinted name and address on it, is signed in very clear handwriting by S. Calvin. The postmark on the envelope is Washington State. With these clues to go on, select ‘Payments’ from the ‘Transactions’ menu and we’ll get started.

You’ll now see a screen you haven’t seen before. It looks like this:
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You’re looking at one of QuickFill’s “batch header” screens. QuickFill uses different versions of this batch header form for the ‘Payments’, ‘Renewals’, ‘New orders’, ‘Combination orders’, and ‘Prospects’ transactions (they are also used for the ‘Controlled subs’ and ‘Requalifications’ transactions in the audit system). As you know, QuickFill processes these transactions in batches, not individually. One of the purposes of the batch method is to provide you with tighter controls over these crucial entries.

Here’s how QuickFill’s batch method works. (We’ll use the ‘Payments’ transaction as our example.) Before entering anything in QuickFill, you count the number of payments you received and add up the dollar amount. Then you enter these totals in the ‘Declared’ fields in the batch header. QuickFill now keeps track of the transactions you enter and matches the totals against the ‘Declared’ amounts.

Say when you’re through entering these transactions, the “actual” totals you entered and the totals you “declared” don’t match. QuickFill will let you know, so you can make corrections.

The batch header also lets you enter data that is common to all—or most—of the transactions in the batch. That way, you don’t have to enter that data for each transaction. You’ll also see how this feature works. Let’s enter our three payments now.

Two of the three payments are for $75.00 and the third is for $37.50. So our batch will have a dollar value of $187.50 ($75.00+$75.00+$37.50). Enter “3” in the ‘Declared number of items’ field on the payments header form and “187.50” in the ‘Declared dollar amount’ field.

When we enter our individual payments, you’ll see that the two remaining fields on the header, ‘Payment type’ and ‘Amount’, also appear on each individual payment transaction. You can save keystrokes by entering data now into these fields. QuickFill will copy your entries into the individual transactions.

When your cursor moves to the ‘Payment type’ field, a message (“Press F2 to select from a list of codes”) appears on the last line of the screen. You can either right click in this field or press “F2” to see the payment types QuickFill allows. Since all three of our payments are by check, click on “C Cash or check” or since the cursor is on this option, simply press Enter. Two out of three of our payments are for $75.00, so enter “75.00” in the ‘Payment amount’ field. Now click on “New” at the bottom of the screen.

Before continuing you must specify the order number to which you want to apply the first payment. Our first payment is for order number 2571. So enter this number in the ‘Order or combo number’ field of the payment box and click on “OK.”
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Now you will see the address for Mr. Alexander Manette, the customer for whom we are entering the first payment. Since Mr. Manette did not indicate a change of address, click on the ‘Payment’ tab or press Ctrl-RightArrow to move to the “Payment” screen. The payment screen will look like the one below.

You can see that QuickFill has automatically entered “C” in the ‘Payment type’ field and “75.00” in the ‘Amount’ field of the payment form. QuickFill has also entered “3” in the ‘Bill number’ field. This is the number of the last bill QuickFill generated for this order. (It’s possible the customer sent back an earlier bill with the payment. If so, you would enter the number of the earlier bill in this field.) In this case, the customer did, in fact, return the third bill.

Every field is now correct, so click on “OK” to tell QuickFill to accept this payment. As soon as you do this, QuickFill returns you to the batch header form. But something has been added. You now see a one-line summary of the payment you just entered. You can also see that the “actual” fields in the batch header reflect the payment.

Note: credit card number encryption

The credit card number fields in your QuickFill database files are encrypted so that they cannot be extracted using a file viewer. In addition, when working with QuickFill, credit card numbers are masked so that you can only see the last four digits unless you are on the detailed lookup screen or in the adjust order transaction and your
QuickFill user name has permission to view and adjust credit card numbers.

If you wanted to change (or delete) the transaction you just entered, you could do so by clicking on “Change” or “Delete.” However, we don’t want to change or delete it. Since we have more payments to enter, click on “New”—for “New payment”—now.

Our second payment is for order number 2551. Enter this number and then click on “OK.” When you move to the ‘Payment’ tab, you will see that QuickFill again entered “3” in the ‘Bill number’ field. So far, so good.

But look at the right section of the screen. This customer has an amount due of $37.50, but QuickFill automatically entered the $75.00 we entered in the batch header form. Let’s ignore this discrepancy for a minute and see what happens. Click on “OK” to tell QuickFill to accept the payment. No dice. QuickFill catches the error and brings it to our attention. Before we answer the “do you want to” question, we’d better have another look at the check we received.

Well, well. The check is for $37.50. We’re so used to getting checks for $75.00—the amount for a year’s subscription—that we didn’t even notice this odd amount. To tell QuickFill that you want to correct this entry, just make sure that “Correct payment amount” field is selected (the button to the left of it should be filled in) and click on “OK”. The cursor returns to the ‘Payment amount’ field, where you can now change the payment to the correct amount of $37.50. After you enter “37.50,” click on “OK.”

As soon as you do this, QuickFill returns you to the batch header form. Notice that another one-line transaction summary has been added to the screen. If you wanted to change (or delete) either of the transactions you just entered, you’d simply place your cursor on the transaction and click on “Change” (or “Delete”). Since we have one last payment to enter, click on “New.”

Our last payment is the one from S. Calvin. Since we don’t know the order number, leave it blank and click on “Lookup.” As soon as you do, you see the ‘Lookup’ screen. Enter “Calvin” in the ‘Person’s name’ field and click on “Find.” You should now see the cursor on “Calvin, Susan” in the “Customers by Name” list. Since there’s only one Calvin, this must be our customer. So click on “Subscriptions” to select this customer. You now see the “Subscriptions and Prospects Records” screen for this customer. Susan Calvin has two subscriptions.

The payment she sent is for her QWKFIL subscription, so click on the QWKFIL subscription summary line. Now click on “Orders” and QuickFill will take you to the “Subscription History and Orders” lookup screen. The “Orders” section has only one line, so click on “Select.” QuickFill returns you to the payment transaction and enters the correct information from Ms. Calvin’s order. Go to
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The ‘Payment’ tab (you can do so by clicking on it or by pressing the Ctrl-RightArrow keys simultaneously). Since we are assuming that your policy is to enter payments that come in without bill stubs under the number of the last bill you sent, you can now click on “OK” to accept this transaction.

You’ve now entered three payments totaling $187.50. QuickFill recognizes that the “actual” and “declared” payment amounts are equal and asks if you want to post the batch. If you answer “Post it now,” QuickFill updates your database and creates a batch report. We do want to post the batch, so click on “OK” (the cursor is already on the ‘Post it now’ option—the button to the left of it is filled in). When QuickFill has finished posting the batch a message stating “Posting of batch 182 complete” will appear. Click on “OK” to this message and then close the “Unposted Payment Batches” screen.

We suggest that you now go to ‘Lookup’ on the ‘Transactions’ menu, and check each of the three orders you just paid. You should also print—or view—the batch report that QuickFill created after it posted your batch. Remember, you use ‘Print...’ on the ‘Reports’ menu to do this.

New orders

The next transaction we’ll explore is ‘New orders’.

Again, begin by selecting ‘New orders’ from the ‘Transactions’ menu. You should see a screen that looks like this:

![New orders screen](image)
As with payments, you can enter fields on the batch header that are common to all or most of the orders in your batch. We are going to enter two one-year unpaid orders for AIC. Both of these orders are for a term of four issues. The orders came into our office on plain letterhead.

We will begin by declaring the number of items in the batch. Enter “2” in the ‘Declared number of items’ field. Since the orders we are going to enter are unpaid leave the ‘Declared dollar amount’ field blank.

Now we’ll move to the ‘Publication’ field. Any batch of new orders may contain orders for several different publications. But if you follow our recommendations you will sort your incoming orders into batches so that each batch contains orders for just one publication. This way you can enter the publication code on the batch header screen and you won’t have to enter it for each order. If you remember the publication code, you can just type it in the field. If you don’t remember it, you simply right click, move the cursor in the pop-up box to the publication you want, and click on it. QuickFill will enter this code in the field. Use your mouse to select publication “AIC.”

QuickFill also requires every new order to have a “tracking code”—the equivalent in some other fulfillment systems of a source code, a promo code, or a key code. You use the tracking code to “track” your promotion results back to a particular list, mailing package, advertisement, and so forth. If most of the new orders in your batch have the same tracking code, you enter it in the batch header. Otherwise, you wait and enter the tracking code for each order individually. Again, if you remember the tracking code you can just type it in the field. If you don’t, right click in this field, move the cursor to the code you want, and click on it. Use your mouse to select the tracking code “DRIFT” and then enter “4” in the ‘Term’ field. (It is AIC’s policy to assign the tracking code DRIFT to orders that come in on letterhead.)

Now, before we begin entering our first new order, let’s review the ‘Start issue’ and ‘Channel’ fields.

The ‘Start issue’ field can be left blank because QuickFill knows what the starting issue should be (you set it under ‘Definitions’ too). You would enter an issue in this field only if you wanted to start a batch of customers with a back issue or a future issue.

The ‘Channel’ field identifies the source of the order, usually mail, blow-in cards, Internet, and so forth. When you define your tracking codes in ‘Definitions’, you identify the channel that is associated with each tracking code. Then, whenever you enter a tracking code QuickFill automatically fills in the channel for you. Sometimes the channel may not be directly linked to your tracking codes (you might be using the channel code to identify a telephone salesperson) so QuickFill gives you the opportunity to fill in the channel manually.
Tour of QuickFill

Transactions

For now, we're going to skip these and the remaining fields on the batch header and begin entering our new orders. (We can leave the remaining fields in the batch header blank, since they don't apply to our new orders.) Click on "Single" since we are entering a normal order with no separate billing address.

You should now see a screen that looks like this:

![Screen shot of QuickFill interface]

A form for entering the name and address of the customer who's placed this order appears. We'll also enter other information about the customer. To move the cursor from field to field, you can use your mouse or the Tab key.

*Note: maximum length for address lines*

The maximum width for each address line is 40 characters. If you have a printer that cannot print 40-character wide address lines (for labels, bills, and renewals), you must check the 'Limit address label width to 30 characters' field (on the 'General' tab of the “Preferences” definition screen) so that QuickFill will restrict the title, company, department, street1, and street2 fields to 30 characters during data entry and imports. In addition, the city field will be restricted to 16 characters and, although the first name and last name fields will continue to allow entries of up to 20 and 30 characters respectively, when the name address line is constructed (from the prefix, first name, last name, and suffix) QuickFill will restrict the total width to 30 characters.
Go to the ‘Prefix’ field and type “Mr.” notice the arrow that appears to the right of the field. QuickFill allows you to define your own choice lists for the prefix, suffix, title, city, state, zip code, sex, and demographic code fields. This is helpful because it is more efficient for data entry operators to select elements of customers’ addresses that occur so often from a list of options than it is for them to manually enter the data each time. Since we have not previously defined a choice list, if you right click in the ‘Prefix’ field or click on the arrow to the right of it, a message stating “No choices have been defined for this field” will appear. (For more information on choice list files, refer to “How to,” “Create a choice list file” in the table of contents for QuickFill’s help system.)

Now let’s continue by typing “James,” the first name of our first customer in the ‘First name’ field. Notice what happens in the “Mailing label” section (the white box that begins above the ‘Last name’ field) of the screen. Type “Bowie” and “Jr.” in the ‘Last name’ and ‘Suffix’ fields respectively.

Leave the ‘Salutation’ (QuickFill uses this field for mail-merge letters) field blank. Now go to the ‘Sex’ field. You can enter in the ‘Sex’ field any letter (or number) you want. We suggest you use these codes: ‘M’, ‘F’, ‘U’ (unknown), or ‘N’ (a company, say). You can also use these codes to select certain groups of customers for promotions.

Now move your cursor to the ‘Title’ field and enter Mr. Bowie’s title, Vice President. Now enter Mr. Bowie’s company, department, street, and city, in the appropriate fields, as they appear on the screen on the following page. Again, notice what happens in the “Mailing label” section of the screen as you make an entry in each field. After you’ve entered the city, move to the ‘State’ field and stop.

*Note: automatic capitals in the customer address form*

As you enter the above information in the customer address form, the first character of each field will automatically be capitalized. This feature makes it easier to enter a customer’s name and address as it minimizes the number of times the shift key must be used; it saves keystrokes.

As you can see on the following page, QuickFill fills in a mailing label image above the form as you enter data. When you’re done, this label looks exactly like the real mailing label you get when you run the ‘Issue labels’ update. So you should spot-check the label image as you enter each order. That way, you can make sure that your label will have a deliverable address. (You should also check the mailing-label image each time you do an ‘Address change’.)
Tour of QuickFill

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Now, click on the ‘Order’ tab without entering the name of a state. As you can see, QuickFill won’t let you leave the ‘Customer’ tab without entering a state. Click on “OK” to the warning message on your screen.

Type “LA” in the state field and then move to the next field. Now click on the ‘Order’ tab. Again, QuickFill won’t let you leave this tab without entering a zip code. Click on “OK” to the warning message on your screen.

Let’s type “12345” in the ‘Zip’ field and click on the ‘Order’ tab. Whoops! QuickFill lets you know that this zip code is incorrect for Louisiana. It also gives you the range of correct zip codes for this state. (The zip code ranges are defined in ‘Definitions’.) Click on “OK” to the message on your screen. Then type “71019” and press the Tab key. Notice that QuickFill filled in the country for you based on the state and zip code you entered.

Now go to the ‘Tax Juris’ field—the sales tax jurisdiction for our new customer. You don’t have to worry about this field if your publications aren’t taxed in any state. If your publications are taxed, you can assign tax jurisdiction codes based on customers’ country and postal/zip codes or, for U.S. and Canadian customers, based on state or province codes. In this database, we have chosen to assign tax jurisdictions based on state or province codes. (For details on sales tax definitions, refer to “Definitions,” “Tax rate tables” and “Definitions,” “Tax jurisdictions” in the table of contents for QuickFill’s built-in help system.)
AIC isn’t taxed in Louisiana, so we don’t have to worry about this field.

Leave ‘Y’ in the ‘Taxable’ field. You’d change this field to ‘N’ only if your customer were a tax-exempt organization—religious organization, say. It’s important to realize that you’re entering in this field information about the customer’s tax status, not the publication’s. If you told QuickFill not to charge sales tax for this publication (that is, you left the ‘Sales tax table’ field on the publication definition general screen blank), no customer will be charged tax. If your publication is taxed only in certain states, QuickFill charges sales tax for only those customers whose ‘Tax Juris’ code matches those states—and who, of course, are not tax-exempt.

Leave the ‘Phone’, ‘Fax’, ‘E-mail’, ‘ID’, and ‘Password’ fields blank.

What you enter in the next two fields, ‘Allowed usage’ and ‘Type’, will be used when you run promotional labels. The ‘Allowed usage’ fields control how you use the customer’s name and address for postal, E-mail, telephone, and fax correspondence. When you move the cursor to each field you can see the possible entries and their descriptions on the bottom left side of the screen. For now, let’s leave these fields set to their defaults. (That is Y, meaning that the customer’s name and address may be used for all types of correspondence.)

The ‘Type’ field is used to specify whether or not a customer is a bad debt customer or a seed. Since this customer is neither, we’ll leave this field blank.

Now, let’s move over to the demographic data fields. There are four numeric fields (A through D) and two alphanumeric fields (Data 1 and Data 2). You can use these fields to enter any codes you’d like. You can enter numbers from 0 to 9,999 in the numeric fields and anything at all in the data fields.

You might use the numeric fields to code customers according to company size, for example, with “1” meaning the company has less than $100,000 in sales, “2” meaning it has between $100,000 and $300,000 in sales, and so forth. In the alphanumeric fields, you could note, for example, why you gave a customer a complimentary subscription. You can use any of the codes to include or exclude customers when you run promotional labels. You can also get a report—‘Customer statistics’—that breaks down your subscribers by numeric code. Enter anything you’d like—or nothing—in the demographic fields.

Finally, let’s discuss the last fields on the ‘Customer’ tab, the postal codes fields. These three read-only fields (‘Zip2’, ‘Cert date’, and ‘Carrier Rt’) display the delivery point code, the address certification date, and the carrier route. When adding new customers to your database, these fields are blank. As mentioned earlier, if you have Semaphore Corporation’s ZP4 address correction and certification software (“ZP4” will be listed on the bottom right side of your screen), you can correct and certify addresses as you enter them into your database, by clicking on the “Address Lookup” button. Refer to “How to,”
“Certify customer addresses” in the table of contents for QuickFill’s built-in help system for more information on using ZP4 address correction and certification software with QuickFill.

When you’re ready to move on, click on “OK” to tell QuickFill to accept the customer address.

Now you see the new order form. Notice that QuickFill has automatically filled in the fields we entered on the batch header screen. Since we left the ‘Service’, ‘Payment type’, ‘Payment amount’, ‘Premium’, and ‘Agency’ fields blank, they are also blank on the order form. If we hadn’t entered a term on the batch header screen or we wanted to change the term, we could click on an offer in the list on the top right side of the screen and the term, price, and service code associated with that offer would be entered on the order form.

In addition to the fields mentioned above, there are several other fields. Notice that the billing and renewal series fields have been filled in with the ones entered as the default on the publication definition billing and renewal screens respectively.

We can change any of these fields for each order if we want to. We can also change the quantity if the customer has ordered more than one copy. And, we can provide credit card information and a purchase order number for each order. Move the cursor through each field on this screen. Pay particular
attention to the messages that appear on the bottom line of the screen and to the message that pops up under the list of offers for the ‘Premium’ field.

The information in the order form is fine as it is, so click on “OK” to complete the order. Just like payments, the new order transaction lets you change or delete the entry you just made or continue entering orders. Since we have one more order to enter to complete this batch, click on “Single.”

This time, notice how the “Replicate” button on the customer address form is now accessible. Click on this button now. The name and address of the customer previously entered (James Bowie) is copied into the name and address fields for the customer you are currently entering. This feature is extremely helpful when entering subscriptions for customers who share the same address (employees of a company, for example). Click on ‘Cancel’ to go back to the batch header screen.

Now click on “Single” again. This time enter an order for Joseph Smith, 1 Main Street, Anytown NY, 10101. After entering the customer’s name and address click on “OK.” Since the order form is already filled in, click on “OK” again. QuickFill searches the customers that are already in the database and, as shown on the screen below, comes up with a possible match.

![Screen shot of QuickFill](image)

It seems like it’s the same person although the first names are slightly different, so click on “Same person.” QuickFill then displays both the existing customer...
Tour of QuickFill

Transactions

record (in the column titled “1 THIS ADDRESS WILL BE SAVED”) and the record of the possible duplicate customer (in the column titled “2 THIS ADDRESS WILL BE DISCARDED”). You can merge the information on the records by clicking on “Merge,” swap addresses by clicking on “Swap,” or copy information from one field to another by clicking on “Copy Field.” Be sure to look at both the “Address” and “Phone & Demographics” tabs before clicking on “OK.” To move from one tab to another, click on the tabs or use the Ctrl-RightArrow and Ctrl-LeftArrow key combinations.

Note: using “Merge”

“Merge” may be used to merge the sex, telephone number, fax number, E-mail address, user ID, password, demographic fields, and the last four digits of 10 digit zip codes. If the record that is going to be discarded contains data for any of these fields and the other does not, then the data is automatically copied to the record that is being kept.

When you’re done looking at the addresses, click on “OK.”

As you complete each new order, QuickFill searches your database to see whether or not that customer already has a subscription to the publication for which the order was entered; this is to guard against the entry of duplicate orders. In this case Mr. Joe Smith already has an active subscription to AIC so QuickFill asks you what you want to do:
Click on “Yes” and the duplicate order will be accepted and Mr. Smith will receive two issues each quarter. Click on “No” and the order will be rejected. Let’s click on “No.”

QuickFill will return you to the batch header screen. Click on “Single” and enter a new order. When you are done, click on “OK.” QuickFill will return you to the batch header screen and since you have now entered two orders you will be asked if you want to post the batch.

This time click on the option to ‘Continue working’ and then on “OK” to tell QuickFill you want to continue entering orders. Why? In this case, it’s just for practice. But when you’re entering actual orders, you might continue if you made a mistake counting the number of orders in a batch—for example, if you had three orders instead of two.

Now click on “Single” and enter another order. After you’ve entered all the information in both the customer address and order forms, click on “OK.” Move the cursor to the ‘Declared number of items in batch’ field at the top of the batch header screen. Change the number in this field to “3” to match the actual number of orders you entered. Now click on “OK.”

You’ll see the “Unposted New Order Batches” screen. It looks like the screen below:
Tour of QuickFill

Transactions

Whenever a new order, renewal, payment, or combination orders batch isn’t posted—either because you told QuickFill not to as you just did or because the batch isn’t in balance—QuickFill keeps the batch and lets you change or delete it. If you click on “Change” you can change the batch header form or change and/or delete individual orders. Once you’ve fixed everything that needs fixing, you click on “OK” on the batch header form and are brought back to this screen. Then you select “Post Now.” (If you have a multiuser QuickFill system, you should use “Post later”—refer to QuickFill’s built-in help system for details on posting batches.) For now, click on “Post now.” When QuickFill displays the message stating that the batch has finished posting, click on “OK.”

Now let’s take a look at the batch reports QuickFill created for the new orders it just posted. Select ‘Print…’ from the ‘Reports’ menu and view the reports that were created. When you’re done, try entering a batch of paid orders on your own. Compare the batch reports from a batch of unpaid orders and a batch of paid ones. (When you’re done, close the “New order” and “Print Saved Reports” screens.)

Renewals

Now we’re going to enter one batch of renewals. You’ll see that the process is very similar to entering a batch of payments.

We received in today’s mail three renewals on our renewal notice forms: They are from order number 1499, renewal notice number 2, with a check for $120 (the one-year rate), order number 2083, renewal notice number 1, for one year, but with a check for $118, and order number 2196, renewal notice number 4, a one year gift subscription with a check for $360. Order number 1499 also needs an address change. Order number 2083 has an $11 credit balance (you should look up this order now, then look it up again after you enter the renewal to see how QuickFill handles the credit balance).

Start by selecting ‘Renewals’ under the ‘Transactions’ menu. The batch header screen is almost the same as the one we used for payments. However, with this header, you can also enter the term and premium.

Enter the following in the batch header:

- Declared number of items = 3
- Declared dollar amount = $598.00
- Term = 12
- Payment type = C
- Payment amount = leave blank
- Premium = leave blank
- Service = leave blank
- Billing Series = leave blank
- Renewal series = leave blank
Now click on “New” at the bottom of the screen. Before continuing you must specify the order number that you want to renew. You enter—or look up—the ‘Order number’ the same way you did with payments. (The lookup screen appears whenever you click on “Lookup” in the ‘Renewal’ box.) Enter order number 1499 and click on “OK.” Notice that QuickFill now displays the customer information for Warren G. Harding on the ‘Address’ tab. Let’s click on “Change Address” (on the right side of the screen) so that we can correct Mr. Harding’s street address to read 29 Teapot Dome. Move the cursor to the ‘Street’ field, highlight “Circle,” type “Dome,” and then click on “OK” to return to the ‘Renewals’ transaction.

Now click on the ‘Renewal’ tab. You will see that QuickFill supplies the ‘Response #’, ‘Effort code’, ‘Copies’ ‘Price’, ‘Shipping’, ‘Tax’, and ‘Total due’. QuickFill enters a number in the ‘Response #’ field based on the last renewal notice produced for the order. The renewal effort code comes from the renewal series you’re using and corresponds to the response number. (If the renewal did not come from a series, you have to provide an effort code. To do this, you right click in the ‘Effort code’ field and select from the list of effort codes.) You’ll also notice that a list of “offers” appears in the box on the right side of the screen to remind you of the terms and prices you offered on the renewal effort you just entered. (You can select an offer by clicking on it. When you do so, QuickFill enters the associated term, price, and service code on the order form.)

Entering a renewal channel is optional (this code shows how you obtained the renewal—from mail, say, or an incoming phone call). Use your mouse to move the cursor to the ‘Amount’ field and enter 120. Now move to the ‘Premium’ field. The content of the “offers” box on the right changes to remind you of the premiums associated with the offer you are using. In this case, there are no premiums for the offer we’ve selected.

Finally, click on “OK” to tell QuickFill to accept this renewal and address change. Once you are back on the renewal batch screen, click on “New” to enter our second renewal.

Enter order number 2083 and click on “OK.” Go to the ‘Renewal’ tab, move the cursor to the ‘Amount’ field, enter “118,” and click on “OK.” Now click on “New” to enter our third renewal order.

Enter order number 2196 and click on “OK.” A different address screen appears this time because this order is for a group subscription. Instead of seeing just one address, QuickFill shows you the list of customers that belong to this group. Since our renewal doesn’t say anything about changing information for the members of this group or adding or deleting members, we can click on the ‘Renewal’ tab to continue entering the renewal.
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Review the fields on the ‘Renewal’ tab. Don’t forget to enter the payment of $360. Also, according to the renewal notice that Mr. Bolton sent back, this renewal is for a gift. Since the order being renewed was not marked as a gift, the “GIFT” series we defined are not in the billing and renewal series fields. We can change this by going to the ‘Gift/Comp’ field and entering a “G” in it. Once we move to the next field, QuickFill will change the billing and renewal series to the “NEWGFT” series. When you’re done, click on “OK.”

Since we entered a payment for $360 and the amount due is only $324, QuickFill asks us how we want to handle this overpayment. Before we answer the “do you want to” question, let’s have another look at the offers listed on the ‘Renewal’ tab. There is only one offer for $120 a copy and this order is for three copies so it seems like the price should be $360. Perhaps there is a discount for the effort code we entered.

First, close the warning message on the ‘Renewal’ tab by clicking on the “x” in the top right corner of the message box. Next, go to the ‘Definitions’ menu and select ‘Renewal’, ‘Efforts’. Click on the “ONE_YR” effort code and click “Change.” On the bottom right side of the “Renewal Efforts” screen you’ll see that there is a 10% discount for prepaid orders. So that’s why QuickFill calculated the amount due as $324 instead of $360.

Click on “Cancel” and then close the “Renewal Efforts” screen. Now go back to the ‘Renewal’ tab and click “OK.” This time when the message concerning the overpayment is displayed, select the option to create a credit balance, and click “OK.”

Since our declared totals and the actual numbers match, QuickFill asks if you want to post the batch. We’re all set so click on “OK” to post the batch now. QuickFill processes the renewals, creates a batch report, and displays a message stating that the posting of the batch is complete. You can click on “OK” to this message and then close the “Unposted Renewal Batches” screen.

Now look up Ms. Annika Settergren’s subscription (order number 2083). This is the subscription we just renewed that had a credit balance. Notice the message—“$11.00 credit rolled forward”—in the subscription history for the renewal transaction. You should also review the batch report for this renewal batch.

Replacement Acknowledgement

When we received the request for a renewal from Mr. Bolton, he also asked that we send him a receipt for his renewal. As mentioned earlier, we have decided to send order acknowledgements for all pre-paid gift subscriptions. Normally, we run the ‘Order acknowledgements’ report every two weeks to create acknowledgements. It just so happens that we ran the report yesterday. However, since Mr. Bolton specifically asked for a receipt, we don’t want to make him wait for it until the next time we run the report. We can use the
‘Replacement acknowledgement’ transaction to create Mr. Bolton’s order acknowledgement today.

Simply look up Mr. Bolton’s subscription (order number 2196), move the cursor to the renewal order that you just entered, and then select ‘Replacement acknowledgement’ from the ‘Transactions’ menu. You will see a screen similar to the one below.

Before creating the acknowledgement, you need to tell QuickFill the billing series that contains the messages and format you would like to use for it. To do this, right click in the billing series field and select the “GFTACK” series that you defined earlier. Now, click on “Print now” to print the acknowledgement, “Print later” to create the acknowledgement and add it to the ‘Forms’ tab of the “Print saved reports” screen, or “Preview” if you would like to display the acknowledgement on your screen now.

Order acknowledgements created by the ‘Replacement acknowledgement’ transaction are exactly the same as those created by the ‘Order acknowledgements’ report. After you’ve looked at the acknowledgement for Mr. Bolton’s subscription, we’ll move on to our next topic, updates.
Tour of QuickFill

Updates

If you click the ‘Updates’ menu, you’ll see 12 options under it. We’re going to explore just the first two—‘Bills’ and ‘Issue labels’.

Note: Don’t worry if running the updates doesn’t produce exactly what we describe below. If you’ve performed additional transactions while exploring, the updates will be affected.

The issue labels update

The main purpose of this update is to produce the labels you’ll use to mail issues to subscribers. The update also produces labels for premiums, bills if your publication policy is to send a bill with the first issue of a new order, and renewals if you are using “by issues” renewal series.

Running the ‘Issue labels’ update may also:

1. Reactivate temporarily suspended subscriptions.
2. Cancel orders at expiration and write off any amounts due.
3. Change the active order to expired and change a future order to active.
4. Change the status of an order to expired or graced.
5. Write off small amounts due.

The current issue

The ‘Issue labels’ update produces labels for the current issue. Which is the current issue? To see, select ‘Definitions,’ ‘Issues’ from the main menu. (As we will see later, you can see the current issue from the issue label update screen too.) Click on “QWKFIL” in the ‘Pub code’ field.

This “issue table” contains a list of numbers and issue dates. QuickFill assigns to each issue a number, which it uses to identify the issue. You tell QuickFill the format you want for the issue date. You can have any format you choose—monthly, as it is here; quarterly; biweekly; and so forth. Also, in this issue table, you can see two “pointers”—the “Current” issue pointer and the “New orders” pointer. You set these pointers manually.

The “Current” pointer governs what happens when you run the ‘Issue labels’ update. This pointer lets QuickFill know the most recent issue available for

QuickFill
fulfillment. QuickFill then produces labels and/or files for all issues up to and including this current issue.

So with the “Current” issue pointer set as it is above, the ‘Issue labels’ update will produce labels for issue number 36 (12/04). It will also produce labels for any back issues the customers require. Of course QuickFill keeps track of the last issue you send to each customer and never generates a label for the same issue twice. That means you can run the ‘Issue labels’ update as often as you want.

You set the “Current” issue pointer by moving the cursor to the issue you want and clicking on “Current issue.”

When you enter a late renewal—one where the customer has already missed some issues—QuickFill starts this renewal order with the current issue, unless you specified when you defined the publication that you want to back start late renewals with earlier issues or you override the start issue when entering the renewal; this is done using the ‘Next issue’ field.

What about the “New orders” issue? This is the issue you use to start new orders—unless you override the “new orders” issue when you enter the order. So with the “New orders” pointer set as it is above, a new order would start with issue 36. You set this pointer by moving the cursor to the issue you want and clicking on “New orders issue.”
You have to set both these pointers yourself. You may, however, choose to have the new orders and current pointer automatically advanced to the next issue after an issue label run; this is done on the ‘Issue labels’ update screen. When you’re done looking at the issue table click on “Close.”

Now let’s run some issue labels. Select ‘Issue labels’ from the ‘Updates’ menu. You should see a screen that looks like this:

QuickFill uses the name and number you enter in the ‘Company name’ and ‘Phone number’ fields on the “header sheet” that identifies labels, bills, and renewals for your mail house. It also uses this name on the update reports. QuickFill calculates and prints on the bills and renewals a date based on the system date (that is, the date on your computer) and the entry you make in the ‘Date the bills and renewals…’ field. When you enter a number in this field and then advance the cursor to the next field, QuickFill displays the date that will be printed on your bills and renewals. (The ‘Issue labels’ update produces bills only if you specified when you defined your publication that you wanted to mail bills with the first issue of a new subscription. It produces renewals only if you are using a “by issues” renewal series.)

If you would like QuickFill to automatically advance the “Current” issue pointer after the ‘Issue labels’ update is run, check the ‘Advance issue pointer(s)
Tour of QuickFill

Updates

after update is completed’ field. If you do not check this option, you can change the “Current” issue pointer manually in the issue table definition.

You tell QuickFill the publications for which you want to run the update by double clicking on the publication name or clicking on the box to the left of the publication name so that an “X” appears in it. You should select QWKFIL. (If you want to run the updates for both publications at the same time, you simply click “Select All.” But, to keep matters simple, we’ll run the update for one publication at a time.)

Now that you’ve made your selection, click on “OK.” QuickFill will ask you when you want to run the update. Whenever you run reports or updates you can run them immediately or run them later as part of a job list. We want to run the update now, so make sure ‘Run it now exclusively...’ is selected (the button to the left of the field should be filled in) and then click on “OK.” As you can see, the update doesn’t start running immediately. QuickFill displays a warning first. It looks like this:

You’ll see this message every time you run an update. Clearly, we want to emphasize that it’s extremely important to make backups of your database regularly. However, you don’t have to worry about making a backup of your demo database. So for now, click on “Yes” to the warning.

As you can see, you can follow the update’s progress with the box that pops up on the screen while the update is running. QuickFill executes the update in two steps.

First QuickFill examines all the subscriptions to the publication(s) you selected to see which orders need labels, bills, or renewals and then sorts the selected orders into the proper sequence.

During this first step, the progress box looks like the one on the following page.
During the second, and final, step, QuickFill creates the files from which you print the actual labels, bills, renewals, and reports. The progress box now looks like this:

Subscriptions to be examined 132
Subscriptions examined 72
Issue labels to be created 55
Issue labels created
Bills to be created
Bills created
Renewal notices to be created
Renewal notices created

When the update is through running, you can view and/or print all the files the update produced. (If you want to look at the reports later, you can click on “Close” and then select ‘Print...’ under the ‘Reports’ menu when you want to view them.)
Tour of QuickFill

Updates

User's Guide

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The screens on the previous page contain the reports that the ‘Issue labels’ update you just ran created. QuickFill would have created additional files for “premium only” labels, bills, and billing reports if your orders had required them. The list of reports you’ll see on your screen will also contain the other reports you’ve created so far.

Go to the ‘Labels’ tab and try to delete the “Issue labels—Standard” file. QuickFill asks if you’re sure you want to delete this file. You get this message any time you try to delete files created for issue labels, bills, or renewal notices. Click on “No” to tell QuickFill you want to keep the file.

We suggest that you take some time now to explore these ‘Issue labels’ update reports.

You should also look up some QWKFIL subscribers and see how running this update affected their records.

The main purpose of the billing update is to produce bills for subscribers. In addition to generating bills, the billing update can make a number of changes to your subscriber records. It can, for example:

1. suspend subscriptions for nonpayment,
2. cancel subscriptions for nonpayment,
3. write off amounts due that are less than the minimum billing amount you defined,
4. change the active order to canceled and make a future order active,
5. create combination orders for orders that are eligible for combination billing,
6. disconnect orders that are no longer eligible for combination billing from a combination order.

You run the billing update the same way you ran the ‘Issue labels’ update.

*Note: date the bills ____ days after the current date*

QuickFill uses the number in this field to calculate the date to be printed on the bills. This field has no effect on the date that QuickFill uses to calculate when it should generate a bill for an order. Nor does it affect the date that appears in the customer’s order record. QuickFill always uses the system date (on your computer) for these purposes.

Now, go ahead and try running the QWKFIL billing update. When you’re done, take a look at both the “Billing Update Report” and the “Bills” (on the ‘Forms’ tab on the “Print Saved Reports” screen) themselves. Also look up the new QWKFIL subscribers you entered and see how running this update has affected their records.
When you’re done, look up combination order 24 (one of the combination orders that was just created by the ‘Billing update’). To do this, enter “24” in the ‘Number’ field on the ‘Lookup’ screen and click “Find.” You’ll see the “Combination order” screen below.

On this screen, you can view billing information for the combination order as well as a list of the orders that are part of the combination order. You can also use the “Disconnect order from combo” and “Connect order to combo” buttons to remove orders or add orders to a combination order.

**Note: Automatically connecting and disconnecting orders**

The ‘Billing update’ will, when the required conditions are met, automatically create combination orders for orders that have not been issued a bill yet. It will also automatically disconnect orders that no longer meet the criteria for combination billing from a combination order. For more details on combination billing, please refer to QuickFill’s built-in help system.

Before moving on to the next section of this tour, we suggest that you print or view some of the reports you’ve created so far. If you print out the bills, you can use them to enter payment transactions later on. If you have problems with your printing, remember, you can use QuickFill’s built-in help system. If you still have problems, give us a call.
Tour of QuickFill

Reports

When you click on the ‘Reports’ menu, you’ll see, as the first item on the menu, ‘Print…’, which we’ve already discussed. You’ll also see a list of subject areas (i.e., new order reports, renewal reports, etc.) about which you can get information from QuickFill’s reports. When you select any one of these areas, you will see a list of actual reports that you can run with QuickFill.

Most subscription fulfillment systems automatically provide you with a fixed set of reports once a month when they update your subscriber records. QuickFill, by contrast, is designed to let you run the reports you need only when you need them.

Though QuickFill’s reporting method may be unfamiliar to you, we think you’ll quickly find that it’s easy to use. It also gives you certain advantages over other methods. For one, since you produce reports only when you need them, you won’t collect folders of data you don’t need and rarely look at. More importantly, QuickFill’s reporting system lets you slice up your customer database any way you like. That means you can improve your marketing efforts by getting answers to very specific questions about very narrowly defined groups of subscribers.

The answers are always available because, QuickFill doesn’t discard data once you’ve entered it. (It won’t, for example, delete canceled orders.) So it’s easy to find out, for example, the renewal rates of subscribers who came from a particular mailing list, took a six-month subscription, and received a Mickey Mouse watch premium.

Note: ODBC drivers

In addition to the multitude of reports designed to meet your needs, QuickFill also provides ODBC drivers that provide read-only access to your database. (For more details on ODBC, refer to “About,” “ODBC & QuickFill” in the table of contents for QuickFill’s built-in help system.)

Running reports

The first step in running a report with QuickFill is to choose the type of report you want to run. Next, you fine-tune your reports by filling in a “filter screen.” Each of the reports has a filter screen associated with it. (Some filter screens
Tour of QuickFill

Reports

contain multiple tabs—or pages.). These screens let you “filter” your data to include, or exclude, specific items—or categories of items—from your report.

After you’ve selected the report you want to run and filled in the filter screen, you click on “OK” to tell QuickFill you are ready to run the report. QuickFill will display a message box asking you when you want to run the report. You can run a report immediately, or run it later as part of a job list. (We’ll explain job lists later.) For now, we’ll look at what happens when the report is run using the “run now” option. From this point on, you’ll notice that the process is quite similar to running an update. Here’s what happens:

1. QuickFill first looks at all the appropriate records in your database and selects the ones the report will include. A progress box pops up on the screen to let you know how many records QuickFill will examine, how many it has examined so far, and how many will be included in your report. During this stage, QuickFill also sorts the records it selects into the right order for the report you’ve chosen.

2. QuickFill goes through all the records it’s sorted, counts them, and generates your report. The progress box lets you know QuickFill’s progress.

When this process is done, you can choose to print the report, preview it on your screen, or close it. If you close the report, it will be placed on the “Print Saved Reports” screen so that you can view, print, and/or export it to a Microsoft Excel spreadsheet at a later time.

Note: stopping a report

If you made a mistake and want to change the filter while QuickFill is processing records, just click on “Cancel,” and you’ll return to the filter screen. Unlike the updates, you can stop a report at any time without harming your database.

Now let’s try running the ‘New order analysis’ report.
Tour of QuickFill

Reports

The new order analysis report

Go to the ‘Reports’ menu and select ‘New order reports’. Then select ‘New Order Analysis’ and you will see the following filter screen:

![QuickFill filter screen](image)

The first two lines on this filter (‘Report description’ and ‘Company name’) are common to all the report filters.

**Report description**

QuickFill will print whatever you enter in this field on the third line of your report’s “header.” So you should enter in this field any special description you want to give your report—for example, the particular list you selected for this report.

**Note: report header**

On the top of each page of any report appears a “header.” It consists of: your company name; a report description if you entered one; the QuickFill version used to create the report; the batch number of the last batch of transactions you processed; the page number of your report; the date and time your report was created; and other descriptive information for the report you’ve selected.

**Company name**

QuickFill prints the name you enter in this field at the top of each page of your report. You can enter either an actual company name or an arbitrary name you prefer to use on reports. You need to enter this name only once when you create your first report. After that first time, QuickFill remembers the name,
Tour of QuickFill

Reports

and it automatically appears each time you call up a filter screen. So you need to reenter it, only if you want to use a different name.

Sorted by

The six versions of this report differ only in the order in which the report presents the data. Each report shows all new orders broken down by tracking code within the category specified in this field.

You can run eight of the reports (‘New order analysis’, ‘New order revenue’, ‘Renewal revenue’, ‘Renewal rate’, ‘Order history’, ‘Payment rates’, ‘Subscription statistics’, and ‘Accounts receivable’) so that they are sorted in a number of different ways.

This arrangement lets you run reports to answer specific questions. Say, for example, you decide to run ‘New order analysis’ report sorted by list. QuickFill will sort your new orders to show you the number of responses you received from each of your lists. If you run ‘New order analysis’ report sorted by channel, QuickFill will tell you how many orders you received via each channel—mail, telephone, or Internet for example.

Summary

The summary version of the report treats all orders from one tracking code alike. It does not distinguish between different offers on the same tracking code.

Detailed

The detailed version treats each price, term, and premium variation of a new order on a tracking code as a separate category.

Both

Selecting “Both” gives you both the summary and detailed versions of the report.

All the ‘New order analysis’ reports show you all new orders you’ve received on each tracking code—the code you assign to each order when you first enter it into QuickFill. For the first seven weeks’ responses for each tracking code, the report breaks the responses out by week. After seven weeks, the report lumps all new orders with a particular tracking code together. The report also shows you the total orders you’ve received for each tracking code. If you filled in the mailing date and quantity on the tracking code, it will also show you the number of packages you mailed and the response percentage.

Nonzero price

If you check the Nonzero price checkbox, then your report will include orders with a nonzero price. If you check the Zero price checkbox, then your report will include orders with a zero price. QuickFill examines the new order to determine whether or not the price is zero.

Zero price

Internet Extension orders

This field is only active for (QuickFill Internet Extensions (Qfie) customers. You can select ‘Include’ if you would like to include Qfie orders, ‘Exclude’ if you would like to exclude Qfie orders, or ‘Only’ if you would like to produce a report only with Qfie orders.
Tour of QuickFill

Reports

*Order date range*  Any time a report filter contains date range fields, you can either right click or press the “F2” key to select from a list of date ranges. For example, to produce a report that shows the number of new orders entered during the week, select “Current week” in the date range field on the filter. When you do, QuickFill enters a date range that covers Sunday through Saturday of the current week in the fields to the right of the relative date (“Current week”).

Leave the new order analysis ‘Order date range’ field as it is, and your report will include the last six months’ worth of orders. To enter your own date range, select ‘Custom dates’ from the list and then type the date range you would like to use in the fields to the right. To include all new orders, regardless of when they were entered, select “All dates.”

*Note: relative dates*

The ability to select relative date ranges is most useful when you save report filters to job lists. This allows you to run the job lists without having to change the date range. For example, if you run the same set of reports at the end of each week, simply create a “Week’s end” job list and schedule the reports you want to run at the end of the week using a date range of “Current week.” Every time you run the “Week’s end” job list QuickFill will automatically produce reports with information for Sunday through Saturday of the current week.

On the ‘New order analysis’ report itself, you’ll notice a column labeled ‘1st Resp’. QuickFill enters in this field the date of the earliest order that falls within the date range you select in the filter. If you select only orders you received in the last two months, all the first response dates will fall in the last two months, even if there are earlier orders in your database.

*Hints for making filter selections*

The filter screens also include several fields that let you choose categories of orders or customers you want to include or exclude in your report.

If you leave all the fields blank, your report will include all orders or customers in all categories.

If you fill in one or more fields in a particular category (marketing plans, say) or categories, your report will include only orders or customers that match at least one of the fields you’ve specified.

If you check the “exclude” box, your report will exclude any orders or customers that match any of the fields you’ve selected.

If you filled in fields in more than one category (marketing plans and tracking codes, say), an order or customer will appear in the report only if it belongs to all the categories you’ve selected.
If you exclude orders or customers in more than one category, QuickFill excludes an order or customer if it belongs to any of the categories.

If you’ve used both include and exclude categories, the exclusion overrides the inclusion.

Filling in the filters isn’t as complicated as it sounds. After you’ve read through the example below, try to fill in the filter screen. Then check your screen against the one below.

**Example**

Run a detailed ‘New order analysis by list’ report for the marketing plan, “SEPT03.” Use an order date range of “All dates.” Make sure you include a report description to remind you of the selection you made.

Now that your filter screen matches the one above, click on “OK,” select the “run now” option, and then click on “OK” again to run the report.

While the report is running, the progress box will keep you informed of your report’s status, as QuickFill first selects the appropriate data, then sorts it, and finally creates the report. When the report is done, you can print, view, or close it from the report progress box. If you close the report, you can view or print it later by selecting ‘Print...’ on the ‘Reports’ menu. To leave the filter screen, click on “Close.”

**User’s Guide**

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Tour of QuickFill

Reports

We suggest that you now print this report and look it over carefully. The report should look like this:

Try to run the same report, but this time select the “Summary” version on the filter. Then try running the ‘New order analysis by publication’ report with the same information on the filter you used for the List report. Take a look at both these reports.
Promotional labels

A promotional label is any label you produce for a purpose other than sending a customer an issue. For example, you might run promotional labels to send to someone who is renting your mailing list. Or you might use promotional labels to send all subscribers to one of your publications a promotional mailing for a second publication. We’ll take a look at this situation in our example below.

Each printed set of labels includes a “cover sheet” (which is actually the size of one or two labels) that contains identifying information.

The ‘Promotional labels’ report is found by first selecting ‘Reports’ from the main menu, selecting ‘Customer lists’, and then selecting ‘Promotional labels’. The filter for this report lets you select specialized groups of subscribers for your labels. You could, for example, run labels for all male subscribers in Utah who took an AM/FM radio as a premium.

QuickFill also lets you include unique seed names when you run promotional labels for list-rental purposes. Seed names, as you probably know, are names in your records that, when mailed, come back to you. That way, you can monitor the use of your mailing lists. By including unique seed names in your promotional labels, you can track the use of each copy of a list you rent.

You can also generate a report showing how many labels you produced by sectional center (that is, the first three digits of a zip code), by state, and by foreign country. You can either run this report separately or with the labels.

The filter screen for this report contains seven tabs. You can use your mouse to move between tabs or use the Ctrl-RightArrow and Ctrl-LeftArrow keys. For most of the labels you’ll probably want to produce, you don’t need to fill in more than the first two tabs of the filter. But you should familiarize yourself with the other tabs, since they give you considerable flexibility. Before we create our promotional labels, read through the tabs for this filter.

Promotional labels example

We’d like to promote our publication, AIC, to all our customers who have never subscribed to it before. So on our promotional label filter screen, we’ll include all customers—regardless of their status—who have ever subscribed to QWKFil. But we’ll exclude all customers who have subscribed to AIC.

We want to print the customer number on each label. That way, we won’t have to rekey names for the orders this mailing will generate. (QuickFill automatically enters all the address information you need for a customer, when you enter new orders for existing customers with their customer number.) We also want to put the key code “AIC107” on the labels, so we can use it as a tracking code when we enter the orders. We want to produce printed labels and a promotional labels summary report. We’ll use the first name “Jason” for our seed names.
Tour of QuickFill

Reports

You can set up this example using just the first two tabs of the promotional labels filter. Try setting it up on your own and then check your results against the following screens.
When you’ve finished filling in the filter screen, click on “OK,” and, this time, select “Run it with tonight’s jobs” and then click on “OK.” Once your report has been saved to the “Tonight’s jobs” job list, close the ‘Promotional labels’ report.

Next, we explore job lists.
Tour of QuickFill

Job lists

The ‘Jobs’ menu items allow you to create and edit queues with jobs (such as reports, updates, exports, and imports) that you would like to run together.

QuickFill has one pre-defined job list named “Tonight’s jobs.” Batches that you choose to “Post later” are automatically added to this job list. You can also add any reports, updates, exports, and imports that you would like to run at the end of the day to this job list. When you run “Tonight’s jobs,” as each job is completed it is removed from the job list. This automatic removal of completed jobs only applies to the “Tonight’s jobs” job list.

QuickFill also allows you to create your own job lists. The advantage of creating and using your own job lists is that you can save and re-use the filter selections for reports, updates, and other jobs. This is helpful because it provides the ability to run the same reports the same way daily, weekly, monthly, etc. For example, you can create a “Week’s end” job list and schedule the reports you run at the end of each week, using a date range of “Current week,” to run as part of this list. Then, at the end of each week, run the “Week’s end” job list to create reports with data from Sunday through Saturday of the current week. Because the reports are not being run as part of “Tonight’s job,” QuickFill will not remove them from the job list after they are run. (For more details on job lists, refer to “Jobs menu,” “Edit/Run job lists” in the table of contents for QuickFill’s built-in help system.)

Now that you understand a little bit about job lists, let’s go to the ‘Jobs’ menu and select ‘Run tonight’s jobs’. When you do this, QuickFill will run the ‘Promotional labels’ report you just scheduled. While the report is running, the progress box will keep you informed of your report’s status. Again, QuickFill first selects the appropriate data, then sorts it, and finally creates the report.

When you ran the ‘New order analysis’ report in “run now” mode, you could print, view, or close your report from the progress box after the report was done running. You’ll notice that you won’t have these options when you run the report as part of a job list. When your ‘Promotional labels’ report is done, you will be left on the “Job lists” screen.
Tour of QuickFill

We suggest that you print the labels and the report you’ve just created and spend some time looking them over. To do this, go to the “Print Saved Reports” screen (by selecting ‘Print…’ on the ‘Reports’ menu).

Summary
This wraps up your tour of QuickFill. Our demo, of course, could touch upon just a few of QuickFill’s many capabilities. But we hope you now have a better feel for QuickFill’s power and flexibility.

We hope, too, that you’ll try your hand at entering more transactions and running a few of the other updates and reports. We encourage you to explore the remainder of the QuickFill User’s Guide and Reference Manual as well as to use the built-in help system as you work with each menu item.

Please explore as many aspects of QuickFill as possible. Remember, if you have questions along the way, you can reach us at CWC Software between 10:00 a.m. and 5:00 p.m. (Eastern Standard Time) Monday through Friday at 1-800-762-7702 (International 781-843-2010).
Chapter 4

Audit System Basics

- Overview
- Glossary of audit-related terms
- Summary of QuickFill’s audit features
- Transaction & update flow
- Procedures
QuickFill’s Audit System provides the ability to collect the data and produce the reports necessary to do a circulation audit.

The purpose of a circulation audit is to provide advertisers with standardized, verifiable information about your publication’s circulation. QuickFill supports circulation audits provided by three organizations: BPA WorldWide (BPA), the Audit Bureau of Circulations (ABC), and Verified Audit of Circulation (VAC). QuickFill’s Audit System supports audits by all three organizations as long as they are not unit or noncontinuous audits.

A circulation audit requires you to collect and report specific information about your subscribers. Typically, you periodically require your subscribers to submit a qualification form that provides information about themselves and their businesses. This information is then captured in your fulfillment system and reported to your audit bureau on a “publisher’s statement.” Once a year, the audit bureau sends an auditor to your office to verify the accuracy of the information in your statement.

QuickFill’s Audit System not only allows you to capture and report on the required data but also to manage your circulation so that you can improve the attractiveness of your circulation to advertisers. For example, you might cancel a group of subscribers based on their specific answers to your questionnaire (their answers may have indicated a marginal interest in the field you serve), then create subscriptions for more attractive subscribers out of your prospect pool. (Note: if you do not have the Audit System, you will not be able to see the audit fields and screens described in this chapter.)

When you install the Audit System, it immediately becomes integrated into QuickFill. QuickFill’s menus expand to include the additional transactions, updates, and reports needed to handle audited publications. Moreover, the screens for existing transactions fully accommodate audit-related data.

Like QuickFill itself, the Audit System is designed for ease of use, flexibility, and speed. The system not only lets you handle even the most complicated audit in-house, but it also provides powerful tools for managing your circulation. You can, for example, maintain a pool of qualified prospects and ask “what-if” questions about how your publisher’s statement would look if
Audit system basics

Overview

you dropped some of your existing circulation and added new subscriptions from the prospect pool.

If you aren’t already familiar with QuickFill, we recommend you start by working through the “Tour of QuickFill.” The demonstration provided in the tour uses a sample database that provides real data with which to explore and experiment with QuickFill. If you are already a QuickFill user, you should work with the tour of the Audit System.
Glossary

Controlled subscription
A free subscription that may be canceled at the whim of the publisher.

Paid subscription
A subscription with a nonzero price that may or may not have been paid for yet. This definition of the word “paid” conflicts with its usage for nonaudited publications, where it means a subscription for which the publisher has already received payment.

Qualified subscriber
A person that fits the definition of the field served by the publication. The publisher usually defines the field served with an eye to maximizing advertising revenue. However, the definition must stay within the limits prescribed by the audit bureau. For example, you cannot claim that your publication serves “all” buyers of gears and sprockets. You can only say that your publication is sent to buyers of gears and sprockets and you must back up that claim by asking prospective subscribers whether they buy or intend to buy gears and sprockets.

Qualification date
The qualification date is used to determine the age of qualified subscribers for the Publisher’s Statement. In general, only subscribers that have qualified within three years may be included in the qualified circulation.

Bulk subscription
A subscription that has more than one copy being delivered to one person who will redistribute them to other unidentified persons. For some audit bureaus these subscriptions are known as “Multi-copy, same addressee”.
Sponsored subscription

A paid multi-copy subscription that is purchased to promote the professional or business interests of the purchaser. According to ABC, “Qualified purchasers of sponsored sales shall be defined as businesses or individuals having a consumer presence. Third party subscription selling organizations or other vendors to the publication circulation industry shall not be recognized as qualified sponsored purchasers.” Multi-copy individually addressed subscriptions that are purchased by an employer for their own employees should be classified as single subscriptions.

Rotated (noncontinuous)

For ABC and BPA, in order to be included in the qualified circulation, a subscriber must receive at least six months of continuous service. A person that is added to the subscriber list just before the audit issue and then dropped immediately afterward must be counted as a rotated (noncontinuous) subscriber. Similarly, if you let a subscription expire, then return it to the active list two months later so that one or two issues are missed, the auditor may classify the subscription as rotated (noncontinuous). The QuickFill Audit System does not support noncontinuous audits.

Verified circulation

Verified circulation is a class of circulation used by ABC audited consumer magazines. “Verified Individual Use” subscriptions are free subscriptions that are mailed to individual subscribers based on their desirable demographics. “Verified Public Place” copies are distributed in bulk to hotel rooms, doctor’s waiting rooms and other similar locations. QuickFill fully supports ABC audited magazines with verified circulation.

Subscription class

Every subscription to an audited publication must be classified under one of the categories below.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NPI</td>
<td>Non-paid individual</td>
</tr>
<tr>
<td>NPL</td>
<td>Non-paid list source</td>
</tr>
<tr>
<td>NPB</td>
<td>Non-paid bulk</td>
</tr>
<tr>
<td>NPA</td>
<td>Non-paid association</td>
</tr>
<tr>
<td>NPM</td>
<td>Non-paid membership benefit</td>
</tr>
<tr>
<td>NPR</td>
<td>Qualified non-paid rotated</td>
</tr>
<tr>
<td>PI</td>
<td>Qualified paid single</td>
</tr>
<tr>
<td>PC</td>
<td>Paid combination</td>
</tr>
<tr>
<td>PS</td>
<td>Paid sponsored</td>
</tr>
<tr>
<td>PA</td>
<td>Paid association</td>
</tr>
</tbody>
</table>
Audit system basics

Glossary of audit-related terms

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAN</td>
<td>Paid association non-deductible</td>
</tr>
<tr>
<td>PM</td>
<td>Paid club membership</td>
</tr>
<tr>
<td>PMN</td>
<td>Paid club membership non-deductible</td>
</tr>
<tr>
<td>PB</td>
<td>Paid bulk</td>
</tr>
<tr>
<td>PD</td>
<td>Paid deferred</td>
</tr>
<tr>
<td>PL</td>
<td>Paid loyalty</td>
</tr>
<tr>
<td>PP</td>
<td>Paid partnership</td>
</tr>
<tr>
<td>PPN</td>
<td>Paid partnership non-deductible</td>
</tr>
<tr>
<td>VI</td>
<td>Verified individual use</td>
</tr>
<tr>
<td>VPP</td>
<td>Verified public place</td>
</tr>
<tr>
<td>NQA</td>
<td>Non-qualified advertiser</td>
</tr>
<tr>
<td>NQP</td>
<td>Non-qualified paid</td>
</tr>
<tr>
<td>NQR</td>
<td>Non-qualified rotated</td>
</tr>
<tr>
<td>NQS</td>
<td>Non-qualified samples</td>
</tr>
<tr>
<td>NQO</td>
<td>Non-qualified other</td>
</tr>
</tbody>
</table>

For a table that lists all of the subscription class codes with the corresponding terminology used by each of the audit bureaus, refer to “Audited circulation,” “Glossary of audit related terms” in the table of contents for the built-in help system.

Request type

The means by which you receive the request for a subscription or the information source you use to determine that the person is qualified. These include:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PDW</td>
<td>Personal direct written</td>
</tr>
<tr>
<td>PDT</td>
<td>Personal direct telecommunication</td>
</tr>
<tr>
<td>PDI</td>
<td>Personal direct Internet or email</td>
</tr>
<tr>
<td>CDW</td>
<td>Company direct written</td>
</tr>
<tr>
<td>CDT</td>
<td>Company direct telecommunication</td>
</tr>
<tr>
<td>CDI</td>
<td>Company direct Internet or email</td>
</tr>
<tr>
<td>MI</td>
<td>Membership individual</td>
</tr>
<tr>
<td>MO</td>
<td>Membership organization</td>
</tr>
<tr>
<td>NRW</td>
<td>Nonrequest written</td>
</tr>
<tr>
<td>NRT</td>
<td>Nonrequest telecommunications</td>
</tr>
<tr>
<td>NRI</td>
<td>Nonrequest Internet or email</td>
</tr>
<tr>
<td>AR</td>
<td>Association roster</td>
</tr>
<tr>
<td>BD</td>
<td>Business directory</td>
</tr>
<tr>
<td>FR</td>
<td>Field reports</td>
</tr>
<tr>
<td>LIC</td>
<td>Licensees</td>
</tr>
<tr>
<td>LIS</td>
<td>Lists</td>
</tr>
<tr>
<td>OTH</td>
<td>Other sources</td>
</tr>
</tbody>
</table>
Audit system basics

Glossary of audit-related terms

The following codes are only for subscriptions that are classified as “Verified public place.”

DHC Doctor/health care providers
PCS Personal care salons
FRF Fitness/recreational facilities
EDL Education/learning facilities
BPR Business/professional services
AUT Automotive outlets
TRA Transportation outlets
GOV Government/civil services
HTL Hotels/lodges
SPR Specialty locations/retail
IRH In-room hotel/lodging
OPP Other public place

The following codes are only for subscriptions that are classified as “Verified individual use.”

CRD Card holders
CHD Charitable donors
CLM Club members
CON Contest entrants
EDU Educators
EVP Event participants
EXE Executives
INR Individually requested
LCH License holders
MBY Merchandise buyers
ORM Organization members
PPR Partnership program
PRO Professionals
SUB Publication subscribers
PDB Public database members
SPH Season pass holders
SBY Service buyers
SRE Survey respondents
TKB Ticket buyers
WRE Warrantee registrants
OIU Other individual use
Audit system basics

Summary of QuickFill’s audit features

Summary of QuickFill’s audit features

Definitions

Qualification form

Most audited publications have a qualification form (the exceptions are publications for which the only requirement for qualification is that the subscriber pay for the subscription or that the subscriber be included in a business directory). The qualification form is used to determine whether or not subscribers are “qualified” to receive the publication. Each publication develops its own form that is unique to the publication and the field that it serves. Usually you include the form on your order cards and renewal notices or on your requalification requests. When you receive the completed forms from your subscribers, you must enter the data into your fulfillment system so that it can prepare the reports that are required for a circulation audit.

When you set up the definitions that describe your publications in QuickFill, you include information about your qualification form. Once you have entered this description of your form, QuickFill uses it to build the qualification data section that may be accessed through most of the transaction data entry screens in the Audit System. For example, when entering a new order, the qualification data section of the ‘Qualification’ tab will look similar to the one on the following page.
Audit system basics

Summary of QuickFill’s audit features

Because QuickFill knows about your qualification form, the qualification data section of your data entry screens will reflect the source documents from which you are entering data. This saves you from having to remember complicated coding rules during data entry. For example, let’s say that your qualification form has ten questions, five of which the customer must respond to and for which only one answer may be selected. When you define your qualification form, you define each of these five questions as being required and having a value of one (only one answer may be selected for each question). Then when you enter a customer, you will not be allowed to move on to the order entry tab until these five questions have been answered. (See chapter 8, Definitions, p. 8.54, for more details on defining a qualification form.)

Requalification sources

A requalification source code is similar to a renewal effort code. It is used only with non-paid controlled subscriptions. Like a renewal effort it identifies the means by which you obtained the qualification data that caused you to extend the subscription of a controlled subscription. Because it is used only for non-paid subscriptions it has no offers associated with it.

The ‘Requal Sources’ definition screen, selected from the ‘Renewal’ submenu under ‘Definitions’, is used to define requalification sources, such as issue wrappers, direct mailings, or telephone calls.

Issue pointers

In addition to issue pointers for new and current issues, the Audit System also has an “Audit issue” and a “Controlled expire” issue pointer.

Usually you will mark one issue in each six-month period as an audit issue. Issues that are so marked will cause the issue label update to create a “galley data file” that lists information about the persons that received that issue. This file includes all of the address data and qualification data for the subscriber. The publisher’s statement report needs this file to print those sections of the report that involve the business occupations, qualification dates and geographic locations of the people who received the audit issue. You will need to provide a copy of this galley file to the auditor either in printed form or by sending them the data file itself.
Audit system basics

Summary of QuickFill’s audit features

The “Controlled expire” issue pointer is used to define a default issue at which controlled subscriptions should expire. You may override this default at the time the controlled subscription is entered. (See chapter 8, Definitions, p. 8.34, for more details on defining the “Audit issue” and “Controlled expire” issue.)

Transactions

The Audit System has three transactions designed to handle controlled circulation and qualification data. Many of the regular QuickFill transactions have also been modified to accommodate qualification data.

Controlled subs

You use the ‘Controlled subs’ transaction to enter qualified non-paid subscriptions. It is similar to the ‘New orders’ transaction except that there are no fields related to pricing, payments, or premiums. Another important difference in the ‘Controlled subs’ transaction is the way you specify the term of the subscription. When you create a subscription using the ‘New orders’ transaction, you enter the number of issues to be served. By contrast, when you create a subscription using the ‘Controlled subs’ transaction, you specify a ‘Start issue’ and ‘Expire issue’, and QuickFill computes the number of issues to be served.

Controlled requal

Just as the ‘Controlled subs’ transaction closely relates to the ‘New orders’ transaction, so the ‘Requalifications’ transaction relates to the ‘Renewals’ transaction. You use the ‘Controlled requal’ transaction when you receive a new qualification card from an existing subscriber. It allows you to enter the new qualification data and extend the expiration date of the subscription.

Adjust qualdata

You use this transaction to make corrections to the qualification data of an existing subscriber without extending the subscription.

Updates

Make subscriptions

You use the ‘Make subscriptions’ update, selected from the ‘Controlled subs’ submenu under ‘Updates’, to create controlled subscriptions in bulk from your prospect pool or from expired subscribers.

Cancel subscriptions update

You use the ‘Cancel subscriptions’ update, selected from the ‘Controlled subs’ submenu under ‘Updates’, to perform cancellations of controlled subscriptions in bulk before they have reached their expiration date.

Both the ‘Make subscriptions’ and ‘Cancel subscriptions’ updates use a qualification data filter that lets you select sets of subscribers or prospects.
Audit system basics

Summary of QuickFill’s audit features

based on their qualification data. In the sample qualification data filter below, we selected subscribers that answered question 1 on the qualification form with a “1” or “2” and answered question 4 with a value between “0” and “100.”

The filter for these updates also allows you to select subscribers or prospects based on the date range in which their qualification data was entered, or, if you would like to, you can select subscriber records that have no qualification data.

Audit reports  The Audit System includes six types of reports to provide the data you need to support your audit.

Qualified circulation

You use the ‘Qualified circulation’ report to obtain breakdowns by business or occupation, qualification source, mailing address, or geographical area. You may obtain a report on either your existing subscribers, your prospective subscribers, or any combination of the two. Use this report as a “what-if” tool. It allows you to see what would happen to the numbers on your publisher’s statement if you were to cancel an existing group of subscriptions or add new subscriptions from a prospect pool.

User’s Guide 4.11
Audit system basics

Summary of QuickFill’s audit features

**Publisher’s statement**

You use the ‘Publisher’s statement’ report to generate statistics for an audit period and for the selected audit issue within that period. The report is in a format that matches the requirements of the audit bureau. You should run this report at the end of each six-month audit period.

**Audit issue galley report**

The ‘Audit issue galley’ report allows you to produce a galley of all qualified subscribers that received the audit issue. This report also allows you to produce a test selection (as requested by the auditor) from the galley. It is able to select names at fixed intervals from the galley file that was generated by the ‘Issue labels’ update.

**Credit cancels report**

The ‘Credit cancels’ report is used to report the number of copies received by customers who have been canceled or suspended for nonpayment, broken down by issue. For BPA and ABC these numbers need to be deducted from the paid subscription counts shown on the ‘Publisher’s Statement’ report.

**Requalification analysis report**

The ‘Requalification analysis’ report is used to obtain a count of requalified orders based on requalification sources or channels.

**Audit test reports**

There is a group of ‘audit test’ reports that are designed to allow you to obtain details that support each section of the publisher’s statement. Use these when the auditor points to a number of section of the publisher’s statement and asks you to provide supporting data. For example, suppose the auditor wanted to verify the count of one-year subscriptions sold during the audit period. You could run the ‘Order Terms’ report specifying on the filter screen that you only wanted to view one-year subscriptions. It would then provide a list of all of the orders with one-year terms. This should match the “length of subscriptions” section of the ‘Publisher’s statement’.
Audit system basics

Transaction & update flow

Historically, subscription fulfillment systems have been oriented toward either paid or controlled circulation. The two types of circulation require different transactions and different kinds of reports. QuickFill’s Audit System provides an integrated approach to both types of circulation. (See p. 4.15 for a flowchart that demonstrates how the audit system’s transactions and updates interrelate in the subscription process.)

QuickFill preserves the distinction between paid and controlled circulation at the level of the individual order. (See chapter 7, Transactions, p. 7.11, for information about the relationship between customers, subscriptions, and orders.) Each order is either “paid” or “controlled.”

Note: paid vs. controlled order
Throughout this section we will use the word “paid” to indicate an order that has a nonzero price, that is, an order that you expect the customer to pay for, regardless of whether you have already received any money. By contrast, a “controlled order” is a free subscription that can be canceled at the whim of the publisher.

Note: non-audited publications
For non-audited publications, the word “paid” indicates an order that has a nonzero price and for which you have already received payment.

You create paid orders by using the ‘New order’ or the ‘Renewals’ transaction. You can also create paid orders in bulk by using the ‘Trial subscriptions’ update. Typically you would use this update to create free trial subscriptions for prospects you hope to convert to paid subscribers through renewal notices and promotional mailings.

You create controlled orders by using the ‘Controlled subs’ or ‘Controlled requal’ transaction. You can also create controlled orders in bulk for a group of qualified prospects by using the ‘Make

User’s Guide
Audit system basics

Transaction & update flow

subscriptions’ update (selected from the ‘Controlled subs’ update submenu). Similarly, the ‘Cancel subscriptions’ update allows you to cancel a group of subscriptions based on qualification data.

There are three distinctions between the transactions and updates that create controlled orders and those that create paid orders:

- Paid orders require information about price, payments, credit cards, and purchase orders. Controlled orders don’t require you to enter this information.

- For a paid order you specify the term of the order, and QuickFill computes the expiration date. With a controlled subscription you specify the start issue and expiration issue when you create the order; with a controlled requalification you specify the expiration issue when you create the order.

- When you enter a renewal or requalification for a paid order, QuickFill continues to serve issues out of the paid order until it expires. Once the paid order expires, QuickFill begins serving issues out of the follow-on order that you created.

When you enter a renewal or requalification for a controlled order, QuickFill immediately cancels the controlled order and begins serving issues out of the new order that you created. The advantage of this practice is that you will always serve paid issues in preference to controlled issues.
Audit System Transaction and Update Flowchart

Transaction and Update Flow for Paid and Controlled Subscriptions
Audit system basics

Procedures

In addition to the regular procedures that apply to any publication, you must perform some extra steps to maintain the data required for an audit. We discuss these extra steps below.

**Audit issue galley data file**

The ‘Issue labels’ update produces an audit galley data file for each issue designated as an “Audit” issue. The galley data file is used to compile the statistics for your ‘Publisher’s statement’ and ‘Audit issue galley’ reports; it should not be deleted.

**Files you need to keep**

After you run the last set of labels for the last issue in the audit period, you should make a backup of your QuickFill database. This backup becomes your archive copy for the audit. To make the backup copy either use the ‘Backup database’ command or the ‘Copy database’ command on the ‘File’ menu. The backup command creates a compressed zip file that must be uncompressed using ‘Restore database’ on the ‘File’ menu or the standalone QFRestore utility before it can be accessed. The copy command creates a complete uncompressed copy of the database files, under a different name.

**Backing up your database for your archive**

The auditor will want to be able to check the source of your qualification data. In order to do so, he or she will request a sample of subscribers from your audit issue and then will ask to see the source documents for the qualification data.

The nature of the documents will depend on the source of the qualification data. In the case of personal written requests, you will have an order card or questionnaire with the subscriber’s signature; in the case of telecommunications requests, you will have a record of the phone call, signed and dated by the operator. Whatever the nature of the documentation, you must be able to produce it for the auditor.

The best way to organize your qualification documentation is by batch number. Whenever you enter new subscriptions, qualified prospects, renewals, or requalifications into QuickFill, do so in batches. QuickFill automatically assigns a number to each batch that you enter, keeps this batch
Audit system basics

Procedures

number with the subscription records, and prints it on your audit galley. If you file the documents for each batch together in numerical order by batch number, with a batch slip to indicate which batch the documents belong to, you will be able to easily find the documentation supporting any subscription in your database. To do so, you simply find the batch number, either from the audit galley or by using QuickFill to look up the subscription, and then locate the batch in your records. To make it easy to find a subscription within a batch, limit the number of subscriptions in a batch to fewer than 30.

After you run the last set of labels for the last issue in the audit period, you should run the ‘Publisher’s statement’ report and the ‘Credit cancels report’. These reports provide the information you need to fill out the forms required by the audit bureau. Depending on the audit bureau’s procedure you may also need to run the ‘Audit issue galley’ report to produce a printed list of subscribers who were served the audit issue (some audit bureaus may ask for the audit issue galley data file instead).

Auditor’s test selection

During an audit, the auditor will ask you to produce a selection from the audit galley. For example, he or she might ask for the 57th name in the galley and every 45th name thereafter. You can produce this selection by running the ‘Audit issue galley’ report.

When you run the ‘Audit issue galley’ report, you will have to specify the audit issue from which the selection is to be made. If the galley data file for the issue is still in your database directory, you will be able to select it when you run the report. If you have copied the galley data file out of the database directory, you will have to copy it back into the database directory before trying to run the ‘Audit issue galley’ for that issue.

If the galley data file for the audit issue has been damaged or lost, you should first back up your current database and report files, then try to restore your galley data file back to a point before it was deleted or damaged. If you are not able to restore the galley data file, you should try to restore your database back to a point just after your audit issue was run and reconstruct the galley data file using ‘Regenerate galley file’ from the ‘Audit reports’ menu. In the event that you are not able to restore the galley data file or the database, go to the ‘Audit reports’ menu and select the ‘Regenerate galley file’ option.

Note: Any changes made in your database since the audit issue (i.e., new orders entered, etc.) may be reflected in the reconstructed galley data file; it may not be an exact copy of the original file. For more information on reconstructing a lost or damaged galley data file, refer to “Regenerate galley file” under “Audit reports” in the built-in help system.
Audit system basics

Procedures

**Computer-to-computer audits**

BPA and VAC conduct “computer-to-computer” (c2c) audits. In order to participate in this type of audit, you must provide them with a galley data file and an addition and removal list.

*Note:* You do not send them your QuickFill database files.

When you run the ‘Issue labels’ update for an audit issue QuickFill creates a galley data file containing data for all of the qualified subscribers who were served that issue. This is one of the files that you must send to the auditor. Even though you send a copy of the galley file to the auditor you must still leave it in your database sub-directory. QuickFill uses the galley data file for several purposes including compiling information for the ‘Publisher’s statement’ and ‘Audit issue galley’ reports.

The auditor must be informed the galley data file is a dBASE file (even though we have given it an extension of “QFDAT”). The galley data file’s name is made up of the database name, publication code, and issue number. For example, if your audit issue for publication code WIDGET in the standard QuickFill database (that is the database files are named QFWDB*.QFDAT) was issue #144, the galley data file would be named QFWDB_WIDGET_0144.QFDAT. The galley data file is located in the database directory.

dBASE files contain a header which describes the data structure of the file. The auditor will be able to access this information. You can do so too by opening the database in Microsoft Excel, provided there are no more than 65,000 records in the file. We have tried to make the file as self-explanatory as possible. In most cases the field names are sufficient. The first 39 fields are the same in every galley data file — the remaining fields vary according to the structure of your audit questionnaire (as defined in QuickFill).

Refer to “Audited circulation,” “Computer to computer audits” in the table of contents for the built-in help system for a sample galley data file structure.

In addition to the galley data file, you also need to send the auditor a list of the customer names that were added to or removed from your circulation for each issue within the audit period. To obtain this list you should run the ‘Addition and removal list’ report that can be found on the ‘Audit reports’ menu. After running the report, select the ‘Print...’ command from the ‘Reports’ menu and locate the report file that you just ran. Look for the name ‘Additions and Removals’ with the most recent date and time. Select the report by clicking on it, then click the “Export to Excel” button on the bottom left of the screen. This will produce an Excel spreadsheet that you should send to the auditor.
Audit system basics

Procedures

If you have a large publication, or you have a lot of turnover in your circulation it is possible for the ‘Addition and Removals’ report to contain more than 65,000 lines, exceeding the maximum length of an Excel spreadsheet. In that case you should run the report separately for each issue in the period, thus producing several smaller lists instead of one large one. Export each of the smaller reports to Excel and send them all to the auditor.
Chapter 5

Audit Tour of QuickFill

- The audit demonstration database
- Defining your questionnaire
- Entering new subscriptions
- Renewals & requalifications
- Issue labels update
- Reports
- Optimizing your circulation
The audit demonstration database

QuickFill contains an audit demonstration database that is similar to the regular demonstration database that you used for the “Tour of QuickFill” in chapter 3. The audit demo contains a single publication called the Widget Gazette. This publication has both paid and controlled circulation and several years’ worth of data, so you can run reports and updates to see how things work. (Note: if you do not have the audit system, you will not be able to see the audit fields and screens described in this chapter.)

Assuming that you have already installed QuickFill’s Audit System, you can start the audit tour by clicking on the QFW Audit Demo icon on your desktop. If you do not have this icon on your desktop, click on the Windows ‘Start’ button and select ‘Programs’, ‘QuickFill’, ‘QuickFill’. Once QuickFill is running, you can access the demonstration database by selecting ‘File’, ‘Open database’, selecting the AUDITDEMO folder, and opening one of the database files (AUDITDEMO_701.QFDAT, AUDITDEMO_702.QFDAT,..., AUDITDEMO_711.QFDAT where “?” represents the QuickFill version letter).

Note: Creating or refreshing the audit demonstration database

During your QuickFill installation, three backup files, Demo_Original_Database.ZIP, Demo_Starter_Kit_Database.ZIP, and AuditDemo_Original_Database.ZIP, were placed into your QuickFill program directory (\QFW). These files contain the nonaudit and audit demonstration databases. To create a fresh copy of the audit demonstration database, simply restore the original database to the appropriate directory (\QFW\AUDITDEMO) using the AuditDemo_Original_Database.ZIP file. (See chapter 6, File commands, p. 6.9, for more information on restoring a “zipped” database.)

Now let’s take a look at the differences between the regular and audit versions of QuickFill.
Defining your questionnaire

When you define a publication in the audit system, QuickFill lets you describe the questionnaire that you use to solicit qualification data from your subscribers. To see how this is done, select ‘Publications’ from the ‘Definitions’ menu, and click on “Change” to change the definitions for the Widget Gazette.

The definitions unique to audited publications are on the ‘Audit’ tab of the publication definition, so click on the ‘Audit’ tab (or, press Ctrl-RightArrow until the tab is displayed). The audit tab should look like this:

The definitions you see on this screen correspond to the questionnaire shown on the next page.
Audit Tour of QuickFill

Defining your questionnaire

We describe in detail how to fill in the questionnaire definitions in chapter 8, Definitions, p. 8.51. For the moment, notice that you can specify in the ‘Reqd’ field whether or not the subscriber is required to respond to a particular question. You can also limit the number of responses the subscriber is allowed to make to multiple-choice questions by filling in the ‘Values’ column. Additionally, you can use questions that have dollar or numeric values as their answer. For more details on defining requirements, values, and codes, you can refer to the built-in help system by pressing F1.

QuickFill uses the information about your questionnaire when you enter transactions such as new orders, renewals, or requalifications. It also uses this information to produce the reports that you need to prepare your publisher’s statement for the auditor.

When you’re done looking at the ‘Audit’ tab, click on “Cancel” and then on “Close” to close the publication definition list screen.
Entering new subscriptions

The QuickFill Audit System has two transactions for entering new subscriptions. You use the ‘New orders’ transaction to enter paid subscriptions along with their qualification data and the ‘Controlled subs’ transaction to enter controlled subscriptions.

Note: paid vs. controlled order

When referring to functions in the audit system, we use the word “paid” to indicate an order that has a nonzero price, that is, an order that you expect the customer to pay for regardless of whether you have in fact already received any money. This is in contrast to a “controlled” order, which is free and can be canceled at the whim of the publisher.

‘New order’ transaction

Now let’s enter a new “paid” subscription. Select ‘New orders’ from the ‘Transactions’ menu to bring up the batch header screen for new orders.

The batch header screen has two fields that you won’t find in regular QuickFill: ‘Classification’ and ‘Request type’. In the ‘Classification’ field, you specify the audit classification for the subscription, such as “Paid individual” or “Non-qualified advertisers, agencies.” In the ‘Request type’ field, you specify the type of request that generated the order, such as “Personal direct written” or “Association roster.” To view the range of choices for each of these fields, right click in them (or, place the cursor in each field and press F2).

For the moment, let’s just fill in “1” in the ‘Declared number of items’ field and “WIDGET” in the ‘Publication’ field. Then, click on “Single” to start entering the order.

You should now see a screen that looks like the one on the following page.
Audit Tour of QuickFill

Entering new subscriptions

Let’s assume that you have received an order card from James Turner that looks like the one on the following page.
Audit Tour of QuickFill

Entering new subscriptions

Please enter my subscription to the **Widget Gazette** for one year (six issues) at the price of $72.00. I understand that if I am ever dissatisfied with my subscription, I may cancel and receive a refund for any issues that I have not yet received.

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>James M. W. Turner</td>
<td>05/15/04</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Title</th>
<th>Company</th>
</tr>
</thead>
<tbody>
<tr>
<td>Great Western Railway</td>
<td>21 Maiden Lane, Covent Garden</td>
</tr>
</tbody>
</table>

**1. Your title**

<table>
<thead>
<tr>
<th>(check one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>President</td>
</tr>
<tr>
<td>Vice President</td>
</tr>
<tr>
<td>Comptroller</td>
</tr>
<tr>
<td>Purchasing Manager</td>
</tr>
<tr>
<td>Sales Manager</td>
</tr>
</tbody>
</table>

**2. Your primary job function**

<table>
<thead>
<tr>
<th>(check one)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Research &amp; development</td>
</tr>
<tr>
<td>Design</td>
</tr>
<tr>
<td>Production</td>
</tr>
<tr>
<td>ABROAD</td>
</tr>
</tbody>
</table>

**3. End products or services of your firm**

(please check all that apply)

1 | President | 6 | Account Manager | 1 | Springs | 4 | Gears |
2 | Vice President | 7 | Production Manager | 2 | Gizmos | 5 | Whatchamcallits |
3 | Comptroller | 8 | Systems Analyst | 3 | Sprockets | 6 | Other |
4 | Purchasing Manager | 9 | Other |  |  |  |
5 | Sales Manager |  | |

**4. Total number of employees in the entire company**

|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

You should enter Mr. Turner’s address in the name and address fields on the ‘Customer’ tab. If you have Semaphore Corporation’s ZP4 address correction and certification software (“ZP4” will be listed on the bottom right side of your screen), you can correct and certify addresses as you enter them into your database, by clicking on the “Address Lookup” button. Refer to “How to,” “Certify customer addresses” in the table of contents for QuickFill’s built-in help system for more information on using ZP4 address correction and certification software with QuickFill.

Next click on the ‘Qualification’ tab (or, press Ctrl-RightArrow) and enter the qualification data from the form. To do this, enter the qualification date from the order card then click in the first qualification data field and begin entering Mr. Turner’s responses. (You may find it easier to use the Tab key to move from field to field.) When you get to the 3rd question, enter a comma between each response (i.e., 1, 2, 4). QuickFill only allows you to enter the maximum number of response values that you specified when you defined your
Audit Tour of QuickFill

Entering new subscriptions

...questionnaire on the ‘Audit’ tab of the publication’s definition. After you have finished entering the qualification date and data, click on the ‘Order’ tab.

You should see a screen that looks like the one below. However, the tracking code and the details of the offer, the classification, and request type will not be displayed until you have actually entered codes into these fields.

Notice the code “ABROAD” in the bottom left-hand corner of Mr. Turner’s order card. This is a tracking code and QuickFill uses it to keep track of the source of your orders. Enter this code in the ‘Tracking Code’ field of the screen. You can type the code in or right click or press F2 and select the code from the list that is displayed.

Now enter “PI” (qualified paid individual) in the ‘Classification’ field; and “PDW” (personal direct written) in the ‘Request type’ field. (Again, you can enter these codes by typing them in the respective fields or right clicking or pressing F2 and selecting the code from the list that is displayed.)

Since Mr. Turner’s order isn’t accompanied by a payment, and since the default term of six issues is correct, you are done with this order. Before clicking on “OK,” look at the other fields on the order screen. You can enter information about payments, credit card numbers, premiums, and so on, in these fields. Now click on “OK.”
Audit Tour of QuickFill

Entering new subscriptions

Since we said we’d enter one order on the batch header, and we have now completed the order, QuickFill asks us if we want to post the batch; the ‘Post it now’ radio button will already be selected. Click on “OK” and QuickFill will now post the batch. QuickFill will display a message to let us know when it has finished posting the batch. Click on “OK” to this message and then click on “Close” to close the “Unposted New Orders Batches” screen.

‘Controlled subs’ transaction

Now let’s take a look at the way you enter new controlled subscriptions.

Suppose that you have an order card for a controlled subscription that looks like this:

Yes! I wish to receive a free subscription to the Widget Gazette

Thomas S. Kuhn
Signature

Date

Thomas S. Kuhn
Name (please print or type)

Title
Institute for Advanced Study

Company
3 Paradigm Ave.

Address
Princeton, NJ 08540

City State Zip

1. Your title
(check one)

1 President
2 Vice President
3 Comptroller
4 Purchasing Manager
5 Sales Manager

6 Account Manager
7 Production Manager
8 Systems Analyst
9 Other

3. End products or services of your firm
(check all that apply)

1 Springs
2 Gizmos
3 Sprockets

4 Gears
5 Whatchamacallits
6 Other

2. Your primary job function
(check one)

A Research & development
B Design
C Production

D Sales
E Other

4. Total number of employees in the entire company

500

You enter this order using the ‘Controlled subs’ transaction. Select ‘Controlled subs’ on the ‘Transactions’ menu. Type “1” into the ‘Declared number of items’ field, right click in the ‘Publication’ field and select WIDGET, right click in the ‘Tracking code’ field and select CNTR02, and then right click in the ‘Classification’ field and select NPI (qualified non-paid individual). Now click on “New.”

You should now see a screen with three tabs (‘Customer’, ‘Qualification’, and ‘Subscription’). The first two tabs are the same as the ‘Customer’ and
Audit Tour of QuickFill

Entering new subscriptions

‘Qualification’ tabs you fill in for new orders. The third tab, ‘Subscription’ is unique to the ‘Controlled subs’ transaction.

Using the order card above, enter the name, address, and qualification data for Mr. Kuhn. When you’re done, click on the ‘Subscription’ tab. It should look like this:

Notice that the expire issue has already been set by QuickFill. This field defaults to the issue specified by the “Controlled expire” pointer in the issue table (see chapter 8, Definitions, p. 8.34, for more information on the “Controlled expire” issue pointer). You can, of course, override this value if you wish by right clicking or pressing F2 and selecting from a list of defined issues.

Once you are done, click on “OK.” The batch is balanced and you can post it by clicking on “OK.” Again, QuickFill will let you know when the batch has finished posting. Click on “OK” in the message box and then on “Close” to close the “Unposted Controlled Subs Batches” screen.

As you can see, the main difference between entering a paid and a controlled order is that the paid order requires information about the terms of the order such as price, payment method, and purchase order number.
Renewals & requalifications

The QuickFill Audit System has two transactions that are used to enter renewals. One is for paid subscriptions and the other is for requalifications of controlled subscriptions. Both of these transactions allow you to enter new qualification data.

Now let’s enter a renewal of a paid subscription. Assume we’ve received the renewal notice on the following page along with a check for $81.00.

Start by selecting ‘Renewals’ under ‘Transactions’ on the main menu. Enter “1” in the ‘Declared number of items’ field, “$81.00” in the ‘Declared dollar amount’ field on the batch header, and click on “New.” Enter the order number “1151” in the ‘Order number’ field and click on “OK.”

You should now see a screen with three tabs (‘Address’, ‘Qualification’, and ‘Renewal’). The ‘Address’ tab contains the customer’s name and address information for the order being renewed. If a customer requests a change of address with their renewal, you can simply click on “Change Address” and make the requested changes. The second tab is for entering the customer’s qualification date and data. It is the same as the ‘Qualification’ tab you fill in for new orders and controlled subscriptions. Finally, the third tab, ‘Renewal’, is for entering the renewal information (i.e. term, classification, request type, payment, etc.).
Audit Tour of QuickFill

Renewals & requalifications

Subscription Renewal

Widget Publishing, Inc.
1 Development Drive
Bala Cynwyd PA 19510

05/01/04  1151-R1

Mr. Friedrich Bessel  [X] One year  72.00
Comet Corp.  Airmail  9.00
Orbital Division  Total  81.00
1784 Halley Wegen
Kaliningrad
RUSSIA

Friedrich Bessel
05/15/04

Signature  Date

1. Your title
(check one)
1 ☐ President  6 ☐ Account Manager
2 ☐ Vice President  7 ☐ Production Manager
3 ☐ Comptroller  8 ☐ Systems Analyst
4 ☐ Purchasing Manager  9 ☐ Other
5 ☐ Sales Manager

2. Your primary job function
(check one)
A ☐ Research & development  D ☐ Sales
B ☐ Design  E ☐ Other
C ☐ Production
CNTR02

3. End products or services of your firm
(check all that apply)
1 ☐ Springs  4 ☐ Gears
2 ☐ Gizmos  5 ☐ Whatchamacallits
3 ☐ Sprockets  6 ☐ Other

4. Total number of employees in the entire company
13

Since the information on the ‘Address’ tab matches the information on the order card above, click on the ‘Qualification’ tab and enter the qualification data for the renewal order. (If we had previously entered qualification data for this customer, QuickFill would have displayed it on this tab.)

Note: updating qualification data on a renewal

If you update the qualification data while entering a renewal, the change will be reflected in the subscription history as a separate line, “Qualification data updated,” under the ‘Renewals’ transaction.
When you’re done entering the qualification data, click on the ‘Renewal’ tab. You’ll see a screen that looks like this:

Now enter “Mail” for the channel, “PI” (qualified paid individual) for the classification—since we now have qualification data for the customer, “C” (Cash or check) for the payment type, and “$81.00” for the payment amount. When you’re done, click on “OK” to complete the transaction. Since the batch is now balanced, you can go ahead and post it by clicking on “OK.” When the batch has finished posting, click on “OK” to the message box and then on “Close.”
Audit Tour of QuickFill

Renews & requalifications

Controlled requalifications

Suppose you have received the following requalification form from a wrapper on a recent issue.

![Requalification Form]

Start by selecting ‘Requalifications’ under ‘Transactions’ on the main menu. Enter “1” in the ‘Declared number of items’ field and click on “New.”

Now enter the order number “827” in the ‘Order number’ field and click on “OK.” You should see a screen with three tabs (‘Address’, ‘Qualification’, and ‘Source’). The first two tabs are the same as the ‘Address’ and ‘Qualification’ tabs for the ‘Renewals’ transaction with one exception. The ‘Qualification’ tab contains a “Get Prior Qual Data” button that allows you to use the qualification data from the customer’s prior order for the order you’re entering. The third tab, ‘Source’, is unique to the ‘Requalifications’ transaction.

Click on the ‘Qualification’ tab and enter the qualification data from the form shown above. When you’re done, click on the ‘Source’ tab. You should see a screen that looks like the one on the following page.
Right click in the ‘Requal source’ field and select WRAP01.

Mr. Eddington’s subscription will be changed to expire with the NOV/DEC 06 issue (that is, the November/December 2006 issue). This is the issue pointed to by the “Controlled expire” issue pointer in the issue table definition. You can, of course, override this value if you like.

When you are done, click on “OK” to complete the transaction and then to post the batch. When the batch has finished posting, click on “OK” to the message box and then on “Close.”
Issue labels update

You run the ‘Issue labels’ update in the same way as in the nonaudit version of QuickFill. The main difference in the audit system is that the update creates an audit issue galley file when serving an audit issue.

We’re going to run the ‘Issue labels’ update to serve the next issue, the JUL/AUG 04 issue, for Widget Gazette. First we need to tell QuickFill that issue 16 is the current issue and is an audit issue. Select ‘Issues’ from the ‘Definitions’ menu. The issue table for publication WIDGET will be displayed. Click on issue 16, JUL/AUG 04, and then on the “Audit issue” and “Current issue” buttons. When you do this, the audit and current issue pointers will appear next to the issue. Click on “Close” to close the ‘Issues’ screen.

Now we’re ready to run the update. Select ‘Issue labels’ from the ‘Updates’ menu. Since we only have one publication in this database, it will already be selected. Click on “OK,” select “Run it now shared…” and then click on “OK” to begin running the update. A message asking if you have a backup copy of the database will appear. (You should always make a backup of your database before running an update.) Since we already have a backup of this demonstration database, click on “Yes.”

As the update runs, you can follow its progress. When it’s done, “Print,” “Preview,” and “Close” buttons will appear in the progress box. Click on “Preview,” to see the report and labels produced by the update. When you’re done viewing the labels, click on “Close” and you’ll be returned to the progress box. Click on “Close” in the progress box and select “No” when QuickFill asks if you want to delete the report files. (The reports will be saved for viewing and/or printing. To see them, you can select ‘Print…’ from the ‘Reports’ menu—the issue labels will be on the ‘Labels’ tab.)

In addition to creating a report and issue labels, the ‘Issue labels’ update also created an audit issue galley data file for issue 16. This file enables you to run the ‘Audit issue galley’ report as well as the ‘Publisher’s statement’ report for issue 16; these are needed for your audit. For audited publications, the ‘Issue labels’ update also automatically reclassifies non-paid qualified subscribers who are more than three years old. For ABC or BPA-audited business publications they are changed to “Nonqualified other.” For VAC-audited publications they are changed to “Non-paid association.”
Audit Tour of QuickFill

Issue labels update

magazines have slightly more relaxed rules: only verified individual request subscriptions (VI with request type INR), and NPI (non-paid individual), NPL (non-paid list source), NPA (non-paid association) and NPM (non-paid club membership) subscriptions are subject to reclassification under the three year rule. QuickFill determines the qualification age of a subscriber based on the difference between the calendar date of the current issue and the subscriber's qualification date. Refer to QuickFill's built-in help system for more information on the qualification date.
Audit Tour of QuickFill

Reports

The audit system has over a dozen reports that provide the data you need for your audit and help you to manage your circulation. The content of some of these reports depends on what you have selected on the ‘Audit’ tab of the publication definition screen for ‘Audited by.’ Our sample publication is defined as “ABC Business.” At some point you may want to change the sample publication’s definition to match one of your publications. Let’s look at three of the audit reports, the ‘Publisher’s statement’, the ‘Audit issue galley’, and the ‘Additions and removals list’, that you will need to complete the audit process.

Publisher’s statement

The ‘Publisher’s statement’ report provides the information you need for your audit. Let’s run this report now. Select ‘Publisher’s statement’ from the ‘Audit reports’ submenu under ‘Reports’ on the main menu.

Right click and select “WIDGET” in the ‘Publication’ field, then enter “1” in the ‘Row headings for business/occupational breakdown’ field and “2” in the ‘Columns’ field. You can use your mouse or the F2 key on these fields if you don’t remember which question is which. Now click on “OK” and run the report in “run now” mode.

Once the report is finished, you can click on “Print” or “Preview” to print or view it. If you want to print or view the report at a later time, you can click on “Close” and the report will be saved on the ‘Print Saved Report’ screen. Normally you would print this report and set it aside for your audit. Click on “Preview” and look through the pages of this report. When you’re done, close the report and the filter screen.

Audit issue galley

When you run the ‘Issue labels’ update for an audit issue, QuickFill creates a galley data file in addition to the usual output it creates. It is important that you save this file in order to run audit reports for a particular audit issue.

The galley data file contains the information you need in order to run a test selection for your auditor. Assume that the auditor has asked you to provide him or her with a selection starting with the third name on your audit galley and including every fifth name thereafter. You would do this by selecting ‘Audit issue galley’ from the ‘Audit reports’ submenu. You should see a screen that looks like the one on the following page.
Right click or press F2 in the ‘Publication’ field and select the publication for which you would like to run the report; in this case, WIDGET. Once a publication has been selected, QuickFill will set the ‘Audit issue’ field to the audit issue that was most recently run. If you would like to run the ‘Audit issue galley’ report for a previous audit issue, use your mouse or press F2 to view a list of defined issues. When you have located the desired audit issue, select it by placing your cursor on it and pressing Enter. (The audit demonstration database does not include audit issue galley data files for issues prior to issue number 15.)

Note: audit issue galley data file

When you run the ‘Issue labels’ update for an audit issue, a galley data file is created; this file has an extension of QFDAT and its name is made up of the database name, the publication code, and the issue number of the audit issue. For example, in the AUDITDEMO database, the galley data file created for issue number 15 of the “WIDGET” publication is named AUDITDEMO_WIDGET_0015.QFDAT).

The galley data file is located in the database directory; this file should not be deleted since you will need it to run the ‘Publisher’s statement’ as well as the ‘Audit issue galley’ for the auditor’s test selections. QuickFill does allow you to regenerate a galley file in case of loss or damage to the original file, but it is best to work with the original. Any
Audit Tour of QuickFill

Reports

changes to your database since the audit issue will be reflected in the reconstructed data file. For this reason, the file may not be the same as the original.

After selecting the publication and audit issue, use your mouse to deselect the paragraph 3 and 4 check boxes. Now enter “3” in the ‘Select names beginning at number’ field, and “5” in the ‘and at an interval of’ field. Click on “OK,” run the report in “run now” mode, and then preview it.

The resulting auditor’s selection should look like the one below:

Addition and removal report

The ‘Additions and removals list’ report provides a list of the customer names that were added to or removed from the circulation for each issue served during the audit period. This report provides the details required to back up the section of the ‘Publisher’s statement’ report that shows the number of copies served and the number added and removed for each issue. You will need to provide the data on this report to your auditor.

Let’s run this report now. Select ‘Addition and removal list’ from the ‘Audit reports’ submenu under ‘Reports’ on the main menu.
Right click and select “WIDGET” in the ‘Publication’ field. QuickFill will automatically fill in an issue range. You can use your mouse or the F2 key on these fields if you would like to change the issue range included in the report. Now click on “OK” and run the report in “run now” mode.

Once the report is finished, you can click on “Print” or “Preview” to print or view it. If you want to print or view the report at a later time, you can click on “Close” and the report will be saved on the ‘Print Saved Report’ screen. Normally you would print this report and set it aside for your audit. Click on “Preview” and look through the pages of this report. You can see that the report is sorted by issue date, paid/non-paid status, classification, whether it is an addition or a removal and service code. For more information on this report as well as how to create a file from it that can be sent to your auditor, refer to the built-in help system.

When you’re done looking at the ‘Addition and removal list’ report, you can close it and the filter screen.

The ‘Qualified circulation’ report, while not used directly for your audit, allows you to ask “what-if” questions about your circulation. Let’s see how this works. Go to the ‘Reports’ menu and select the ‘Audit reports’ menu item. Then select ‘Qualified circulation’.

We are going to use the ‘Qualified circulation’ report to give us a breakdown of our qualified subscribers by title. To do this we need to fill in the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publication</td>
<td>WIDGET</td>
</tr>
<tr>
<td>Business/Occupational Breakdown (Para 3a)</td>
<td></td>
</tr>
<tr>
<td>Row headings</td>
<td>1</td>
</tr>
<tr>
<td>Qualification Source Breakdown (Para 3b)</td>
<td>(deselect)</td>
</tr>
<tr>
<td>Aging date</td>
<td>06/15/04</td>
</tr>
<tr>
<td>Mailing Address Breakdown</td>
<td>(deselect)</td>
</tr>
<tr>
<td>Geographical Breakdown</td>
<td>(deselect)</td>
</tr>
</tbody>
</table>

Your screen should now look like the one on the following page.
Now we’re ready to run the report. Click on “OK,” run the report in “run now” mode, and then preview it. Your report should look like the one on the following page.
Audit Tour of QuickFill

Reports

If you have entered transactions other than those described on the previous pages your results may differ.

When you’re done looking at the report click on “Close” twice, the first time will close the report and the second will return you to the report filter.
Optimizing your circulation

Based on the Qualified circulation report we ran previously only 13.64% of our qualified circulation are Presidents/CEOs. We would like to increase this percentage by canceling some of the subscribers with the title of Account Manager and creating new subscriptions for people with the title of President who are in our prospect pool. To do this we need to know how many customers in the prospect pool have the title of President.

We can find this out by running the same report (refer to p. 2.20 for the criteria originally used), selecting ‘Prospects only’ in place of ‘Subscribers only’. Click on the ‘Prospects only’ radio button. The rest of the fields should remain the same. Now run the report again. This time your report should look like this:

<table>
<thead>
<tr>
<th>Title</th>
<th>Total</th>
<th>Percent</th>
<th>Qualified</th>
<th>Published</th>
<th>Multi Copy</th>
<th>Same Add</th>
<th>Total Qualified</th>
<th>New Add</th>
</tr>
</thead>
<tbody>
<tr>
<td>President/CEO</td>
<td>40</td>
<td>100.00%</td>
<td>0</td>
<td>40</td>
<td>0</td>
<td>0</td>
<td>40</td>
<td>0</td>
</tr>
<tr>
<td>Vice President</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Comptroller</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Purchasing Manager</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Sales Manager</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Account Manager</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Production Manager</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Systems Analyst</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Other</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Did not respond</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Other than 2 years</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Subscriptions</td>
<td>0</td>
<td>0.00%</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total qualified</td>
<td>40</td>
<td>100.00%</td>
<td>0</td>
<td>40</td>
<td>0</td>
<td>0</td>
<td>40</td>
<td>0</td>
</tr>
</tbody>
</table>

(Continued . . )
Audit Tour of QuickFill

Optimizing your circulation

Assume that we want to increase the Presidents to at least 25% of our qualified circulation. Since the file has 88 customers, we want to have 22 (25% of 88) Presidents. From our ‘Qualified circulation’ report we know that we currently have 12, so we need 10 more.

We want to activate 10 of the 40 Presidents in the prospect file and, at the same time we want to cancel 10 of the 23 Account Managers.

We will use the ‘Make subscriptions’ update to create the new subscriptions for the Presidents and the ‘Cancel subscriptions’ update to cancel the extra Account Manager subscriptions. Close print preview and the filter for the ‘Qualified circulation’ report.

Go to ‘Make subscriptions’ under ‘Controlled subs’ on the ‘Updates’ menu. Fill in the following fields on the ‘General’ tab:

- Create new subscriptions from prospects: ☑
- Publication: WIDGET
- Tracking code: MAKE01
- Classification: NPI
- Use prior request type for reactivated...: ☑
- Starting issue: 16 JUL/AUG 04 <-Audit <-
- Shipping class: S
- Maximum subs to make: 10

Now click on the ‘Prospect 3’ tab of the report filter. We want to select only customers who answered “1” (President/CEO) to question 1 on the qualification form. Click on the ‘Select records with qualification data dated...’ field to select it (leave the date range set to “All dates”) and then enter “1” in the first question field and “1” in the first codes field. This tells QuickFill to select only prospects who answered “1” to question 1. (You can use this tab of the filter to select prospects based on a variety of criteria.) Your screen should look like the one on the following page.
Audit Tour of QuickFill

Optimizing your circulation

Now click on “OK” and run the update in “run now, exclusive” mode. Answer “Yes” to the backup warning message. The update will create ten new subscriptions and a report that shows you the number of subscriptions created and the details of how you filled in the filter. When the update is done, click on “Close.” (The report will be put in ‘Reports’ tab of the ‘Print…’ menu item and you can view it later.)

Next we’ll use the ‘Cancel subscriptions’ update to remove the unwanted Account Managers.

Go to ‘Cancel subscriptions’ under ‘Controlled subs’ on the ‘Updates’ menu. Fill in the following fields on the ‘General’ tab:

- Publication: WIDGET
- Maximum subs to cancel: 10

Now click on the ‘Subscriber 1’ tab. We only want to cancel active subscriptions, so enter ‘A’ in the first status field.

Then click on the ‘Subscriber 3’ tab. On this tab we specify that we only want to cancel subscribers who answered “6” (Account Manager) to question 1 on the qualification form. To do so, click on the ‘Select records with qualification data’ update.
dated...’ field to select it (leave the date range set to “All dates”) and then enter “1” in the first question field and “6” in the first code field.

Your filter should look like this:

Now click on “OK” and run the update in “run now, exclusive” mode. Answer “Yes” to the backup warning message. The update will cancel ten subscriptions and create a report that shows you the number of subscriptions canceled and the details of how you filled in the filter. When the update is done, click on “Close.” (The report will be put in ‘Reports’ tab of the ‘Print...’ menu item and you can view it later.)

If you like, you could now rerun the ‘Qualified circulation’ report to verify that Presidents now represent approximately 25% of the qualified circulation.

Summary
This completes our tour of QuickFill’s Audit System. Of course, we have only scratched the surface of the many features of the system. We encourage you to explore further on your own.
Chapter 6

File commands

- File menu
- Check database
- Backup procedures
  - QuickFill’s backup program
  - QuickFill’s restore program
- Running backup
The File menu offers the following commands:

**New database**
Creates a new database.

**Open database**
Opens an existing database.

**Check database**
Performs an exhaustive test for data corruption. We recommend that you run a database check daily and report any errors to CWC Software immediately. See p. 6.4 for more information on this menu item.

**Unlock database**
The unlock database screen is used to “unlock” records in the database that became locked as the result of the failure of a workstation.

**Backup database**
Use the backup command to make a backup copy of your QuickFill database. See p. 6.6 for more information on backup procedures.

**Restore database**
Restores your database from a previously created backup file. See p. 6.9 for more information on restoring a database.

**Rebuild key files**
Rebuilds the database key files from the information in the main data files.

**Rebuild delete chains**
Rebuilds the chains of deleted records in the data files.

**Copy database**
Copies the database to another location, optionally giving it a different name.

**Close database**
Closes an opened database.
# File commands

## File menu

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Normal</td>
<td>Enters normal mode. This menu option does not appear in single user systems.</td>
</tr>
<tr>
<td>Single user</td>
<td>Enters single-user mode. This menu option does not appear in single user systems.</td>
</tr>
<tr>
<td>Lookup only</td>
<td>Enters lookup-only mode. This menu option does not appear in single user systems.</td>
</tr>
<tr>
<td>Print…</td>
<td>Lists report files (including those created by updates and exports) for printing, viewing, and deleting. See chapter 10, <em>Reports</em>, p. 10.18, for more information on ‘Print…’.</td>
</tr>
<tr>
<td>Page setup</td>
<td>Selects a printer and printer connection as well as the paper, orientation, and margins to be used when printing. See chapter 14, <em>Printing</em>, for more information on the ‘Page setup’ menu items.</td>
</tr>
<tr>
<td>1,2,3,4</td>
<td>Opens one of the four most recently used databases that you closed. Which file is opened depends on whether 1, 2, 3, or 4 is selected.</td>
</tr>
<tr>
<td>Exit</td>
<td>Exits QuickFill. You should always exit QuickFill before turning off your computer.</td>
</tr>
</tbody>
</table>

Refer to the built-in help system for more information on any of the above menu items.
QuickFill uses a database system called Raima Data Manager, which has been used in other software products for many years now, so we don’t expect you to encounter problems with a corrupted database.

Occasionally, intermittent hardware problems can cause your data to be changed in subtle ways, so we have provided a utility that checks the integrity of the database structure. We strongly recommend that you run a database check daily. You can schedule it to run with the “Tonight’s jobs” job list. (See chapter 13, Jobs, p. 13.2, for more information on the “Tonight’s jobs” job list.)

The ‘Check Database’ screen lets you speed up the process of scanning the database by electing not to check for certain types of errors. However, we recommend that you use the default options unless time does not allow you to do so. If you must skip some checks, we recommend that you rotate the checks that are performed so that eventually all aspects of the database integrity are checked.

You can open the ‘Check Database’ screen by selecting ‘Check database’ from the ‘File’ menu or by clicking on the ‘Check Database’ toolbar button—

Check set membership consistency

Checking the set membership chains involves tracking the links from each customer to his or her subscriptions and from the subscriptions to each order. This field is selected by default. If you do not want QuickFill to validate the set membership chains, click in this field once so that the check mark disappears.

Note: set membership consistency

The set membership consistency should be checked at least once a week. However, we recommend that you include this option as often as possible, as repairs to set linkages are extremely difficult and time-consuming; they require manual editing of the database.

Check required set memberships

This check involves the examination of set memberships that QuickFill assumes will exist (i.e., orders must belong to subscriptions, subscriptions must belong to customers, etc.). This field is selected by default. Click once to remove the check mark from this field and QuickFill will not validate the required set memberships; this particular option does not have any effect on
the amount of time that it will take to run the database check. In addition, missing set linkages cannot be repaired by running a utility program; like the set membership consistency, repairing linkages for the required set memberships involves manually editing the database.

### Check key files against data files

This check will verify that the structure of the key files is correct and that every key points to a valid data record. A check mark appears in this field by default. Click once to remove the check mark if you would like to skip this part of the database check. If you have a very large database, you may choose to exclude this part of the database check from time to time as errors in the key files may be fixed by running ‘Rebuild key files’ (refer to the built-in help system for details).

### Check data files against key files

This field is not selected by default. Click once so that a check mark appears in this field and QuickFill will verify that every data record has a valid entry in the key files; this is the converse of the check done for “Check key files against data files.” Errors in the key files may be fixed by running ‘Rebuild key files’ (refer to the built-in help system for details).

### Only check this file

You may specify a single data file (number 1 through 11) for which you would like the database check to be run. This option is particularly helpful if a previous database check reported errors in only one file. Once your database has been repaired, you want to run a follow-up database check to ensure that the database file no longer has errors.

**Warning: DO NOT USE A CORRUPT DATABASE**

If you get any error messages when you run the ‘Check database’ utility, that means your database is corrupt. Call Technical Support at CWC Software, Inc. immediately. Some types of errors can be corrected by running specialized utilities that CWC can provide, while other errors may require that you restore the database from a prior backup copy.

When you are ready to run the database check, click on “OK.” When you run this utility, you have the choice of running it immediately or as part of a scheduled job. By choosing the latter you can check your database every night as part of the overnight run of reports and updates. If you do this, make sure the database check is the first item in the scheduled update run. If an error is detected by the utility, QuickFill will stop the run automatically, thus ensuring that you don’t run labels or bills on a corrupt database.

‘Check database’ produces a report file that you can print using the ‘Print...’ on the ‘Reports’ menu. The last line of the report indicates whether or not any errors were found.

See chapter 10, *Reports*, p. 10.16, for more information about the options for running the database check report.
Backup procedures

Why make frequent backup copies of your QuickFill database? Here are some of the reasons:

➤ Your power might fail at the wrong moment, leaving you with a corrupted database. (See p. 6.4 for more details on detecting a corrupt database.) You’ll have to reload (restore) the database from a back up copy.

➤ Your computer hardware might fail, putting you out of action until it can be repaired. If you have a back up copy, you can load your database on another computer, re-enter the work done since the back up copy, and then continue working with QuickFill.

➤ Your computer might be destroyed in a fire. (It’s a good idea to keep a back up copy of your database in another location.)

➤ You might want to run a report using an old copy of the database.

For all these reasons, it is extremely important to make frequent back up copies of your database. We strongly recommend backing it up daily—in the afternoon after you finish the day’s work. You can schedule your back up to run with the “Tonight’s jobs” job list. (See chapter 13, Jobs, p. 13.2, for more information on the “Tonight’s jobs” job list.)

Also, back up your database just before you run any of the updates, such as bills, renewal notices, or issue labels.

➤ After viewing the output from an update, you may need to change a definition (such as a message for bills, or an offer for renewal notices) that was setup incorrectly. In order to re-run the update, you would first need to restore your database from a back up copy and change the definition(s).

Finally, make a back up copy if you’ve just finished entering a large number of new orders, payments, renewals, or other transactions. After all, you don’t want to take a chance that you’ll have to enter all those transactions again.

You should also keep more than one back up copy. We recommend that you rotate your back ups among at least five sets of back up tapes, one for every workday. We also suggest that you take a copy home with you at least once a week. At the end of every month, just before you close the accounting period,
make a special back up copy on a new tape. Keep this month-end copy for at least a year—you may need it as an audit trail for your accountant.

**Methods for backing up**

There are many methods of making back ups. We recommend that you use the ‘Backup database’ command on the ‘File’ menu in QuickFill to back up your database to Zip disks, CDs, or DVDs; these are the best low-cost choices. (See p. 6.7 for details on backing up from within QuickFill.) If you have a very large database, you might use a tape back up system.

**Backup hardware recommendations**

For backup hardware, we like Zip drives. CD and DVD recorders are also good, but QuickFill does not have the ability to write directly to a CD-R drive. QuickFill does contain a built-in database backup feature that works with removable random-access disk media, such as Zip disks. The backup files that QuickFill creates are standard PKZip files.

A backup system that runs automatically every night and backs up the entire server is all well and good, but you should also be able to backup just the QuickFill database during the day, on demand.

**Files to backup**

Since you can always reinstall the QuickFill program files (located in your QF directory) from your install set, there is no need to include these files in your nightly back up.

When you run your back up, you should select all of your QuickFill database files. These files have an extension of QFDAT and are located in your database directory. In addition, you should select any files (such as report files or mail merge files) that you would like to include.

When you back up from within QuickFill, you have the option of backing up your database only or your database and report files. Although there is no need to back up report files on a nightly basis, there are times when you should make a back up copy of these files. We recommend that you back up report files created from the period and year closings. (Refer to the built-in help system for more details on the files produced by ‘Close period’ and ‘Close year’.) If you use the audit system, you should also back up any reports produced for your audit.

**Verifying your backup**

Back up procedures should include frequent integrity tests. If you back up to tape, make sure that you verify (also known as compare) the backup. If you are using removable media, like zip disks, make sure that some form of integrity tests are performed on the backup.

**QuickFill’s backup program**

The ‘Backup’ command is used to back up the QuickFill database and report files. QuickFill backup files are industry standard Zip files that can be viewed using common utilities such as WinZip or PKZip. They can also be viewed directly in Windows Explorer if you are using Windows XP.
File commands

Backup procedures

You can back up your database and report files from outside of QuickFill, but doing so from within QuickFill does have a few advantages:

➤ It always backs up the database that you are currently using with QuickFill. There is never any confusion about which database you are backing up.

➤ The back up can be part of a scheduled update run. You can back up the database and then run issue labels, bills, or renewals overnight without manual intervention.

Note: backing up outside of QuickFill

If you decide not to use QuickFill’s built-in ‘Backup’ program, be sure to select all of the files in your database directory(s) that have a QFDAT extension; these are the files that make up your database(s).

If you use the non-audit system, there will be thirteen QFDAT files for each database. If you use the audit system, there will be at least fourteen QFDAT files (the thirteen database files and one galley data file) for each database. (If you have never run an audit issue, you will only have thirteen QFDAT files. If you have run more than one audit issue, you may have more than fourteen QFDAT files—the thirteen database files plus a galley data file for each audit issue.)

Backup description

Enter the description that you would like QuickFill to print on the back up report that will be produced.

Backup to

Enter the drive or drive and directory to which you would like to back up your files. If you are backing up to removable media, QuickFill will prompt you to insert additional media as needed. You can either type in the location to which you would like to back up your files or click on “Browse” to locate it. If you leave this field blank, QuickFill will put the backup file in the root directory of the drive that your database is on (that is, if your database is on the J-Drive, the backup file will be put in J:\).

The name of the zip file that is created will be DatabaseName_Backup_Date(YYYYMMDD)_Time(HHMMSS).zip. For example, your zip file might be name QFWDB_Backup_20061127_114300.zip.

Backup saved reports, bills, renewals, and labels

If you would like all of your report files (including bill, renewal, and label files) to be backed up with your database, check this box. QuickFill’s restore program (see p. 6.9 for details) provides the ability to restore a database, report files, or both from the zip file that is created.

Compression factor

Enter a number from 0 to 9 indicating the amount of disk compression that you would like QuickFill to use during back up. Zero indicates no disk compression while nine indicates maximum disk compression. Depending on
the size of your database, the greater the compression factor is the longer your back up may take.

Delete old backup files
Select this option if you would like to delete all prior files from the removable disks you are going to back up to or the database files from the back up directory you have specified.

When you are ready to run the back up, click on “OK.” When you run this utility, you have the choice of running it immediately or as part of a scheduled job. Scheduling the back up to be run overnight only makes sense if you are backing up to a tape or disk drive that can hold the complete database on a single tape or disk. There is no point in scheduling a back up overnight if someone has to be there to insert multiple floppy disks!

If the ‘Backup’ program exits with an error status, the scheduled job list run stops automatically so that the remainder of the jobs do not get run when you don’t have a good back up.

See p. 6.11 for more information about the options for running QuickFill’s ‘Backup’ program.

QuickFill’s restore program
The ‘Restore’ command is used to restore your database from a backup copy that you previously created using the ‘Backup database’ command. This will replace the current database files (and optionally report files too) with the files contained in a backup Zip file. Any data that you have entered since the backup copy was made will be lost. If you wish to view the contents of an earlier version of your database without losing your recent work then you must restore the database to an alternate location. To restore to an alternate location you must use the external QFRestore application, not the built-in Restore screen. (Refer to the built-in help system for more information on QuickFill’s built-in and external restore commands.)

Reason for restoring
Whatever you type in this field will appear in the heading of the report file produced by the Restore operation. You can leave this field blank if you wish.

Restore from the following backup file
If you know the name of the zip file containing the QuickFill files you wish restore, you may type it in here, but you will probably find it easiest to click on the “Browse” button and select the file from the appropriate directory.

Restore database files
Check this box if you would like to restore your database files. This is the normal choice, but you can elect to restore the report files without restoring the database files.

Restore report files
Check this box if you would like to restore your report files (including any bill, renewal, and label files that you may have backed up).
File commands

Backup procedures

*Warning: duplicate file names*

QuickFill creates report files with names like `ReportName-nnn.QFRPT`, where “ReportName” is the name of the report (such as, NewOrderHistory) and the “nnn” is a number. Each time a report is created, QuickFill searches for the first number in the range 001 to 250 that is not currently in use. As time goes by, and reports are printed, deleted, and then more reports are created, the same report file name may be assigned to several different reports. If you need to restore a set of reports from last week or last month, make sure you have a backup copy of the current report files, because restoring the old report files will probably overwrite some of the more current report files.

*Restore now* When you click this button the restore operation will begin immediately. You cannot schedule a restore for later execution by placing it on a job list.
Running backup

When you click on “OK” to run the backup program, the screen below will appear:

When you select this option, only the workstation running the backup may be in the database in regular mode; all other workstations must be in lookup mode. In addition, that workstation cannot have any other QuickFill screens open while the backup is running.

For information on these three options, see chapter 10, Reports, p. 10.17.
Chapter 7

Transactions

- Transactions menu
- Types of subscriptions
- Types of orders
- Overview of lookup
- Batches
The items on the ‘Transactions’ menu are used to enter, change, or delete information related to customers and their subscriptions. QuickFill’s transactions fall into two categories, batched transactions and non-batched (or miscellaneous) transactions. When a batched transaction is posted, a separate report is created for it. When a non-batched transaction is processed, it is recorded in a miscellaneous batch; the report for this batch is not created until the miscellaneous batch is closed. See p. 7.21 for more details on batches and the miscellaneous batch.

The Transactions menu offers the following commands:

- **Lookup**  
  CTRL+L  
  Use lookup to search through your QuickFill database for a particular customer, subscription, prospect, or order. (See p. 7.11 for details on ‘Lookup’.)

- **New orders**  
  CTRL+N  
  Use the ‘New orders’ transaction to enter original orders for single, two-party, or group subscriptions. If a customer already has a subscription to your publication, use the ‘Renewals’ transaction instead.

- **Payments**  
  CTRL+P  
  Use this transaction to enter payments for existing orders.

- **Renewals**  
  CTRL+R  
  Use the ‘Renewals’ transaction to enter renewals to existing subscriptions.

- **Combination orders**  
  CTRL+I  
  Use this transaction to enter multiple orders for a single customer, with a single payment. The orders you enter can be new orders, renewals or both.
## Transactions

### Transactions menu

<table>
<thead>
<tr>
<th>Feature</th>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prospects</strong></td>
<td>CTRL+F</td>
<td>Use the prospect transaction to enter the name and address of potential subscribers (those to whom you wish to promote your publication).</td>
</tr>
<tr>
<td><strong>Controlled subs.</strong></td>
<td>CTRL+O</td>
<td>The ‘Controlled subscriptions’ transaction is used to enter new qualified nonpaid subscriptions. (This transaction as well as information about it may only be accessed from the audit system.)</td>
</tr>
<tr>
<td><strong>Requalifications</strong></td>
<td>CTRL+U</td>
<td>The ‘Controlled requalifications’ transaction is used to create a follow-on order for an existing controlled subscription. This transaction enables you to extend the expiration of a controlled subscription. (This transaction as well as information about it may only be accessed from the audit system.)</td>
</tr>
<tr>
<td><strong>Cancel</strong></td>
<td>CTRL+K</td>
<td>Use this transaction to cancel a subscription.</td>
</tr>
<tr>
<td><strong>Suspend</strong></td>
<td>CTRL+S</td>
<td>The ‘Suspend’ transaction prevents QuickFill from generating issue labels, bills, and renewal notices for a customer who has asked that his or her subscription be suspended. This transaction may be used to suspend subscriptions temporarily (until a specific issue) or indefinitely (until reinstated).</td>
</tr>
<tr>
<td><strong>Reinstate</strong></td>
<td></td>
<td>Use this transaction to reverse the effects of a cancellation or indefinite suspension, and to remove a temporary suspension before the issue specified becomes current.</td>
</tr>
<tr>
<td><strong>Merge customers</strong></td>
<td></td>
<td>The ‘Merge customers’ transaction is used to combine two customer records representing the same person into one customer record.</td>
</tr>
</tbody>
</table>
## Transactions

### Transactions menu

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Shortcut</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group change</td>
<td>CTRL+G</td>
<td>Use group change to add members, delete members, or change the number of copies or shipping method for any of the members of a group subscription. This transaction may also be used to change a two-party subscription into a group subscription by adding one or more ship-to addresses.</td>
</tr>
<tr>
<td>Address change</td>
<td>CTRL+A</td>
<td>Use this transaction to change any address or demographic data for a customer.</td>
</tr>
<tr>
<td>Extension</td>
<td>CTRL+E</td>
<td>Use the ‘Extension’ transaction to add extra issues to the term of the current order in a subscription for which a customer complains about not receiving one or more issues. To change the term of an order, for reasons other than missed issues, use the ‘Adjust order’ transaction instead.</td>
</tr>
<tr>
<td>Bounced payment</td>
<td>CTRL+B</td>
<td>The ‘Bounced payment’ transaction is used to reverse a payment for which the check was returned by the bank or for which the authorization for a previously entered credit card payment was declined.</td>
</tr>
<tr>
<td>Transfer payment</td>
<td>CTRL+T</td>
<td>Use this transaction to transfer money from one order to another. For example, use this transaction if you inadvertently apply a payment to the wrong order.</td>
</tr>
<tr>
<td>Refund</td>
<td></td>
<td>Use the ‘Refund’ transaction to generate a refund to a customer. (See chapter 9, Updates, p. 9.44 for information on the ‘Refunds’ update.) If your publication policy is set to automatically refund credit balances larger than $xx.xx (as defined in the publication definition), you may not need to use the ‘Refund’ transaction.</td>
</tr>
</tbody>
</table>
# Transactions

## Transactions menu

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Bill-to</td>
<td>Use this transaction to add a separate billing address to a subscription that was entered with only a single address. The ‘Add Bill-to’ transaction changes the single subscription into a two-party subscription.</td>
</tr>
<tr>
<td>Delete Bill-to</td>
<td>Use the ‘Delete Bill-to’ transaction to remove the billing address from a two-party subscription. This transaction reverses the effects of the ‘Add Bill-to’ transaction; it changes a two-party subscription into a single subscription.</td>
</tr>
<tr>
<td>Adjust order</td>
<td>Use the ‘Adjust order’ transaction to change any of the fields (e.g., start issue, service code, agency, etc.) of an order that cannot be changed by using any other transaction. When looking at a prospect record, this menu item is replaced by ‘Adjust prospect’.</td>
</tr>
<tr>
<td>Adjust prospect</td>
<td>‘Adjust prospect’ is used to change the list code or publication to which a prospect is linked. This transaction may also be used to change the prospect date field. To change a prospect’s name or address, use the ‘Address change’ transaction instead. This menu item only appears in the ‘Transactions’ menu when looking at a prospect record.</td>
</tr>
<tr>
<td>Adjust qualification data</td>
<td>Use the ‘Adjust qualification data’ transaction to change the classification, request type, qualification date, or qualification data of a subscriber or a prospect. (This transaction may only be accessed from the audit system.)</td>
</tr>
<tr>
<td>Remove order</td>
<td>Use this transaction to remove new or renewal orders that were entered incorrectly. When looking at a prospect record, this menu item is replaced by ‘Remove prospect’.</td>
</tr>
</tbody>
</table>
## Transactions

### Transactions menu

<table>
<thead>
<tr>
<th>Transaction</th>
<th>Key Combination</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove prospect</td>
<td></td>
<td>Use this transaction to remove prospect records. This menu item only appears in the ‘Transactions’ menu when looking at a prospect record.</td>
</tr>
<tr>
<td>Make label</td>
<td>CTRL+M</td>
<td>Use the ‘Make label’ transaction to create a “one-shot” label for a customer. “One-shot” labels created by this transaction are prepared for printing by the ‘One-shot labels’ update.</td>
</tr>
<tr>
<td>Add comment</td>
<td>CTRL+Q</td>
<td>Use the ‘Add comment’ transaction to add any additional information you want on file about a customer. Comments are added to a customer’s subscription history; they may not be added for prospects.</td>
</tr>
<tr>
<td>Edit comment</td>
<td></td>
<td>Use the ‘Edit comment’ transaction to change a comment.</td>
</tr>
<tr>
<td>Delete comment</td>
<td></td>
<td>Use the ‘Delete comment’ transaction to delete a comment.</td>
</tr>
<tr>
<td>Summary report</td>
<td></td>
<td>The ‘Subscription summary report’ provides the complete subscription history and order details for an order.</td>
</tr>
<tr>
<td>Replacement Bill</td>
<td></td>
<td>Use the ‘Replacement bill’ transaction to re-create bills that were lost in the mail or that did not print due to a printer jam.</td>
</tr>
<tr>
<td>Replacement Renewal</td>
<td></td>
<td>Use the ‘Replacement renewal’ transaction to re-create renewal notices that were lost in the mail or that did not print due to a paper jam.</td>
</tr>
<tr>
<td>Replacement Acknowledgement</td>
<td></td>
<td>Use the ‘Replacement acknowledgement’ transaction to re-create order acknowledgements that were lost in the mail or that did not print due to a paper jam.</td>
</tr>
</tbody>
</table>

For more details on any of the above transactions, refer to the built-in help system.
Types of subscriptions

You can enter three types of subscriptions in QuickFill, single subscriptions, two-party subscriptions, and group subscriptions. You can also “mark” a subscription as being a complimentary or a gift subscription.

**Single subscriptions**
A single subscription is one in which the person receiving the subscription is also paying for it.

**Two-party subscriptions**
A two-party subscription is a limited version of a group subscription (see below) in which one person is receiving the subscription and a different person is paying for it. This type of subscription has just two customer addresses—a bill-to address and a ship-to address. Issues go only to the ship-to address. A single subscription may be made into a two-party subscription and a two-party subscription may be made into a single subscription by using the ‘Add Bill-to’ and ‘Delete Bill-to’ transactions respectively.

**Group subscriptions**
Any subscription that involves two or more customers receiving issues is a group subscription. You may send the bill to a separate address, or you may send it to the address of one of the customers receiving issues.

If the group subscription is unpaid, then a single combined bill for the entire group is sent to the customer designated as the “bill-to” customer. When the subscription comes up for renewal, QuickFill sends a single renewal notice to the billing address. At any stage of the renewal series you can choose to have QuickFill send separate renewal notices to each of the ship-tos in an attempt to renew them individually.

It is important to understand that a group has only a single subscription record. All members of the group will expire at the same time and actions that you take, such as cancellation, apply to the entire group at once. If you need individual members of the group to have different expirations, then you should enter separate subscriptions.
Transactions

Types of subscriptions

The ‘Group change’ transaction allows you to add or drop members from the group in midstream.

Gift subscriptions

A gift subscription is a special case of a group or two-party subscription. You tell QuickFill that you are entering a gift subscription by entering a ‘G’ in the ‘Gift/Comp’ field of QuickFill’s order form. If you run a special promotion to solicit gift subscriptions, you can specify on the tracking code definition screen that all orders entered using that tracking code should be identified as gifts (refer to “Gift subscriptions” in the built-in help system’s index for further details).

QuickFill uses the same procedures for billing and renewing a gift subscription as it does for other subscriptions with separate bill-to addresses. You specify on the series definition screens whether the bill (for two-party subscriptions only) or renewal notice should be sent to the donor or the donee (refer to the built-in help system for details on the ‘Send to ship-to’ field in the billing and renewal series definitions). Usually you will want to send both the bills and renewals to the donor, although you might send the last renewal effort or two to the donee in the event that the donor does not respond. For this reason you probably will use a different renewal series for gift orders than regular two-party orders. You can specify the renewal series to be used on the tracking code definition for the gift promotion.

Note: detailed bills and renewal notices

QuickFill only produces detailed bills or renewals (ones that list all of the ship-to customers who belong to a gift or group subscription) for subscriptions linked to billing/renewal series that are defined to use packages with the “Detailed” format and that are set up to send bills or notices to the bill-to.

QuickFill uses the gift indicator for these purposes:

- You can have QuickFill break out the labels for gift subscriptions into a separate group when you create issue labels. You specify this in the ‘Gift’ fields of the label split table definition.
- You can select—or exclude—gift subscriptions when you run the ‘Promotional labels’, ‘Customer directory’, ‘Subscriptions statistics’, and ‘Group subscriptions’ reports.
- When a subscription is entered, the billing series and renewal series assigned can be different for gift and non-gift subscriptions. You specify the billing series and renewal series in the tracking code definition.
Transactions

Types of subscriptions

- When a subscription is renewed, the billing and renewal series assigned to the renewal order can be different for gift and nongift subscriptions. You specify the “next” billing and renewal series on the renewal series screen. (Refer to the built-in help system for details on the ‘Next renewal series for gifts’ and ‘Next billing series for gifts’ fields in the renewal series definition.)

Complimentary subscriptions

A complimentary subscription is a free subscription that does not expire. When QuickFill serves an issue to a complimentary subscription, it does not increment the number of issues served for the order.

*Note: complimentary vs. controlled subscriptions*

For audited publications, complimentary and controlled subscriptions are not the same. Controlled subscriptions have a definite end and require qualification data.

QuickFill never sends bills or renewals to complimentary subscribers. In addition, if your publication is defined so that expiration issues are printed on the top line of issue labels (see chapter 8, Definitions, p. 8.48, for details on the ‘Include on label’ field), QuickFill will print “XXXX” for complimentary subscriptions. To change a complimentary subscription to a regular subscription, you can use the ‘Adjust order’ transaction and remove the “C” from the ‘Gift/Comp’ field on the ‘General’ tab. QuickFill will then send renewal notices as specified by the renewal series.

If you want to give people free subscriptions for a definite term, do not enter them as complimentary subscriptions. Say you give your authors free one-year subscriptions but want to renew them as regular paid subscriptions at the end of the year. You should enter them as regular orders with a one-year term and a zero price and use a renewal series that offers to renew the subscription at your regular renewal prices.

Like gift subscriptions, you can specify on the tracking code definition screen that all orders entered using a specific tracking code should be identified as complimentary (refer to “Complimentary subscriptions” in the built-in help system’s index for further details). You can also have QuickFill break out the labels for complimentary subscriptions into a separate group when you create issue labels. You specify this in the ‘Comp’ fields of the label split table definition. Finally, you can also select or exclude complimentary subscriptions when you run many of the reports.

See p. 7.11 for more information on subscriptions. For information on how to enter subscriptions, refer to the built-in help system.

User’s Guide 7.9
Types of orders

If you look up an order after you enter it, you’ll see “New,” “1st Renewal,” or “Renewal” in the ‘Type’ column on the “Order display” lookup screen. What you see depends on whether the order entered was the first order, first renewal order, or a subsequent (second, third, fourth, etc.) renewal order.

The ‘General’ tab of the “Adjust Order” screen also contains an ‘Order type’ field. When you adjust an order, you’ll see that the ‘Order type’ field contains “N,” “1,” or “2” to indicate whether an order is new, a first renewal, or a subsequent (a second, third, fourth, etc.) renewal. If the order is to an audited publication and the subscription is controlled, “N” indicates a new controlled order, “1” a first requalification order, and “2” a subsequent requalification order. (Refer to chapter 4, Audit system basics, p. 4.13, for more information on controlled orders.)

**Current order**

The current order is generally the order for which issues are currently being served. A subscription always has a current order regardless of its status. For example, in the case of an expired subscription, the current order is the last order for which issues were served; it does not matter that the order has a status of “Expired.”

**History order**

A history order is any order prior to the current order. A history order never has an active status.

**Future order**

A future order is a renewal order for which you have not yet begun serving issues. It’s any order after the current order. A future order becomes the current order once you begin serving issues from it.

**Billing order**

The billing order is the order currently being billed. QuickFill bills only one order at a time, beginning with the first order in a subscription that has an amount due. It bills the second order only when the first order has been paid for or written off. A subscription only has a billing order if at least one of its orders has an amount due.

See p. 7.12 for information on how QuickFill creates orders. For information on how to enter or change orders, refer to the built-in help system.
Transactions

Overview of lookup

Lookup

The lookup transaction may be used to find a customer, subscription, an order, or a prospect.

First, however, you need to know that QuickFill keeps track of customers, subscriptions, orders, and prospects separately. So, you need to understand the distinctions among these four categories.

Customers are the individuals—or companies—who hold subscriptions or are prospective subscribers. No matter how many publications a customer subscribes to or is a prospect for, QuickFill keeps only one record per customer. The customer’s record includes fields for name and address data; for such specialized information as tax status, sex, list-rental status, and so forth; and for demographic data.

You see the customer record when you click on “Details” once you’ve looked up a customer (refer to “Lookup” in the built-in help system for information on the detailed customer display lookup screen). QuickFill links each customer record to at least one subscription record or prospect record.

QuickFill keeps track of each subscription in a subscription record. A separate subscription record is maintained for each publication to which a customer subscribes. The subscription record contains the name of the publication, the total number of issues remaining in the subscription, the total amount due (or credit balance) for the subscription, and so on. You see this subscription record when you click on “Subscriptions” for a customer (refer to “Lookup” in the built-in help system for information on the subscription display lookup screen).

QuickFill links this subscription record to the customer record of the individual or company who receives the bill for the subscription (the bill-to address) and to the customer record of each individual or company who is receiving issues (the ship-to address). Of course, for most subscriptions, the bill-to and ship-to customers are one and the same.

In addition to subscription records, QuickFill also links prospect records to customer records. Often a prospect comes from a list of names that you rented for promotional purposes, but it may also be a former subscriber whose subscription has been purged. In either case the prospect is linked to a list code that identifies the source of the name, such as ‘BUSWEEK05’ or ‘03EXPIRES’.

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Transactions

Overview of lookup

Each subscription, in turn, has one or more order records attached to it. QuickFill creates an order record each time a customer orders a new subscription for a publication or renews an existing subscription. In systems with the audit feature an order record is also created when a free controlled subscription is started for the customer, or when the customer requalifies for their existing subscription. In the order record, QuickFill keeps information about that particular order—the price, the term, the number of issues you’ll serve, and so on. The subscription record of a long-term customer usually has attached to it a new order record (the original order), a first renewal order, a second renewal order, and one or more subsequent renewal orders. You see the order record when you select a specific order for a subscription and click on “Orders” (refer to “Lookup” in the built-in help system for more information on the order display lookup screen).

Each order has its own status:

Active
You are currently serving issues for this order.

Future
This order is a renewal. It will become the active order when the current order is completed.

Graced
The term of this order is finished, but you’re continuing to serve issues up to the limit you specified on the publication definition form. If the customer renews the subscription, QuickFill will transfer the extra issues served to the renewal order.

Expired
The term of this order is finished and you’ve served any grace issues.

Suspended indefinitely
You are not serving issues for this order because you’ve suspended it until further notice. The order remains in this status until you enter a “reinstate” transaction.

Suspended temporarily
You are not serving issues for this order because the customer has asked that it be suspended until a specific issue. QuickFill will automatically return the order to active status when the issue the customer specified becomes the current issue.

Suspended for nonpayment
You are not serving any issues for this order, because the customer has not yet paid his or her balance due. QuickFill assigns this status to an order when a billing series reaches the “suspend point.”
## Transactions

### Overview of lookup

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canceled for nonpayment</td>
<td>The subscription (and all the current and future orders in it) was canceled for nonpayment. QuickFill cancels a subscription when you’ve sent the customer a last bill and he or she has failed to pay the balance due.</td>
</tr>
<tr>
<td>Canceled at expiration</td>
<td>The subscription was canceled at the end of its term at the request of the customer. The customer said that he or she didn’t want to renew the subscription but wanted to receive the remaining issues in the subscription.</td>
</tr>
<tr>
<td>Canceled by request</td>
<td>The subscription was canceled at the request of the customer. You did not serve the issues remaining at the time of the cancel request. (The customer said he or she didn’t want the remaining issues, perhaps because he or she wanted a refund for the balance due instead.)</td>
</tr>
<tr>
<td>Canceled, cancel reason</td>
<td>The subscription was canceled at the request of the customer. You did not serve the issues remaining at the time of the cancel request. (The customer said he or she didn’t want the remaining issues, perhaps because he or she wanted a refund for the balance due instead.)</td>
</tr>
<tr>
<td>Canceled by publisher</td>
<td>A controlled order (audit system only) that was canceled because a renewal or a requalification was entered for it. In addition, this status is used to indicate an order that was canceled by the ‘Cancel subscriptions’ update.</td>
</tr>
<tr>
<td>Canceled and transferred</td>
<td>An order that was canceled as a result of a group change transaction. The unearned balance of the order was transferred to a replacement order to accommodate a change in the membership of the group.</td>
</tr>
</tbody>
</table>

Each subscription also has a status. The possible subscription statuses are almost the same as those for orders. The status of the subscription depends on the status of the last nonfuture order that belongs to that subscription.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active</td>
<td>You are currently serving issues for this subscription.</td>
</tr>
</tbody>
</table>
## Transactions

### Overview of lookup

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Graced</td>
<td>The term of the subscription is finished, but you’re continuing to serve issues up to the limit you specified in the publication definition form. If the customer renews the subscription, QuickFill will transfer the extra issues you served to the renewal order.</td>
</tr>
<tr>
<td>Expired</td>
<td>The term of the subscription is finished, and you’ve either finished sending the customer any grace issues or you’ve reached the expiration point in the renewal series.</td>
</tr>
<tr>
<td>Suspended indefinitely</td>
<td>You are not serving issues for this subscription because you’ve suspended it until further notice. The subscription remains in this status until you enter a “reinstate” transaction.</td>
</tr>
<tr>
<td>Suspended temporarily</td>
<td>You are not serving issues for this subscription because the customer has asked that it be suspended until a specific issue. QuickFill will automatically return the subscription to active status when the issue the customer specified becomes the current issue.</td>
</tr>
<tr>
<td>Suspended for nonpayment</td>
<td>You are not serving any issues for this subscription because the customer has not yet paid his or her balance due. QuickFill assigns a subscription this status, when a billing series reaches the “suspend point.”</td>
</tr>
<tr>
<td>Canceled for nonpayment</td>
<td>This subscription was canceled for nonpayment. QuickFill cancels a subscription when you’ve sent that customer a last bill and he or she has failed to pay the balance due.</td>
</tr>
<tr>
<td>Canceled at expiration</td>
<td>The subscription was canceled at the end of its term at the request of the customer. The customer said that he or she didn’t want to renew the subscription but wanted to receive the issues remaining in the subscription.</td>
</tr>
</tbody>
</table>
Transactions

Overview of lookup

Canceled by request
The subscription was canceled at the request of the customer. You did not serve the issues remaining at the time of the cancel request. (The customer said he or she didn’t want the remaining issues, perhaps because he or she wanted a refund for the balance due instead.) If you use cancel reason codes, “Canceled, xxx” (where “xxx” is replaced by the description for the cancel reason code) will be displayed instead of “Canceled by request.”

Canceled, cancel reason
The subscription was canceled at the request of the customer. You did not serve the issues remaining at the time of the cancel request. (The customer said he or she didn’t want the remaining issues, perhaps because he or she wanted a refund for the balance due instead.) If you use cancel reason codes, “Canceled, xxx” (where “xxx” is replaced by the description for the cancel reason code) will be displayed instead of “Canceled by request.”

Canceled by publisher
The subscription was canceled by the ‘Cancel subscriptions’ update (audit system only).

Example: Say that a subscription has been renewed twice, and the most recent renewal was an early renewal—that is, you received the order before the subscriber’s current term expired. This subscription would have three orders:

1. The original order, which is “expired.”
2. The first renewal order, which is “active.”
3. The second renewal order, which is “future.”

The status of this subscription is “active” because that is the status of the last nonfuture order.

The diagram on the following page shows a customer who has a subscription to two publications and is also a prospect. The first subscription has been renewed twice and the second subscription has been renewed once.
Transactions

Overview of lookup

The Lookup screen

You can search through your QuickFill database to find a customer, a subscription, a prospect, or order using your choice of several identifying names or numbers. QuickFill always uses the first field on the lookup screen that is filled in, ignoring any fields below it. (There is one exception to this rule. You can search for a name within a zip code and country by filling in all three fields.) To clear the fields on the lookup screen prior to beginning a new search click the “Reset” button.

You can open the ‘Lookup’ screen by selecting ‘Lookup’ from the ‘Transactions’ menu or by clicking on the ‘Lookup’ toolbar button.

Searching by zip/postal code

To search by zip code, fill in the zip code field and click on “Find.” (You can also search using a partial zip code by entering just the first few digits.) Once you click on “Find,” you’ll see a list of customers sorted by zip code displayed on the bottom of the screen. The first customer with the zip code you specified is highlighted. What happens if you enter a zip code in which you have no customers? In this case, QuickFill goes to the first zip that is greater than the one you specified.
Transactions

Overview of lookup

If a lot of your customers are in the same zip code, you may also want to enter the first few characters of the customer’s company name. Now when you click on “Find,” QuickFill finds the first customer from that company in that zip code.

Tip: lookup by zip code and name

When you include a zip code in your lookup request QuickFill displays records sorted by their “match code.” The match code includes the country code, the zip code, the first few letters of the company name and lastly the first few letters of the customer’s name. If you find that you need to lookup by zip code and name more often than by zip code and company, then you can change the match code to reverse the order of the company name and the customer name. You make this change to the match code on the ‘Lookup’ tab of the Preferences screen. See chapter 8, Definitions, p. 8.69, for details on changing QuickFill’s lookup sequence.

To look up a foreign customer by their postal code, you must first enter their country code and then go to the postal code field and enter the appropriate postal code. One exception to this rule is if your home country is the United States and you’re looking for a Canadian customer. In this case, you can enter the customer’s Canadian postal code; it is not necessary to enter a country code. The space in the code can be omitted. Canadian users of QuickFill may also look up customers from the United States by simply entering the customer’s zip code; again, it is not necessary to enter a country code.

Searching by country code

To search for foreign customers by country code, fill in the country code field by directly typing in a code. You may also use F2 or click on the country code field with your right mouse button to select from a list of defined country codes and the countries they represent. Once you click on “Find,” the list of customers will be sorted by country. The first customer with the country code you specified is highlighted.

If there are no customers with the specified country code, QuickFill goes to a customer with the country code following the one you entered; the list is in alphabetical order. That is, if you entered FIJ (Fiji) in the country code field, QuickFill would go to the first customer for FIN (Finland) if there were not any customers from the Fiji Islands in your database.

You may add, change, or delete foreign country codes by going to the ‘Foreign countries’ menu option under definitions (refer to the “Foreign countries” in the built-in help system for more information).

Searching by person’s name and initial

To search for a customer by using an individual’s last name, fill in the second line of the lookup screen with the first few letters of the last name (the case doesn’t matter) and click on “Find.” QuickFill displays a list of customers in
Transactions

Overview of lookup

alphabetical order by last name. The first customer whose name matches the letters you entered is highlighted.

To search for a customer by using an individual’s last name and first initial, fill in the name field with the customer’s last name, enter the first letter of their first name in the ‘Initial’ field, and click on “Find.” Again, QuickFill displays a list of customers in alphabetical order by last name. The first customer whose last name and first initial matches the letters you entered in the ‘Person’s name’ and ‘Initial’ fields is highlighted.

Note: Searching by last name and first initial

When searching for a customer by last name and first initial do not enter a zip/postal code. Doing so will cause QuickFill to ignore the initial and perform the search based on the zip/postal code and last name only.

Searching by company name

To search for a customer by using a company name, fill in the third line of the lookup screen with the first few letters of the company name (the case doesn’t matter), then click on “Find.” QuickFill displays a list of customers in alphabetical order by company. The first customer whose company name matches the letters you entered is highlighted.

Searching by e-mail address

To search for a customer by using an email address, fill in the ‘E-Mail address’ field on the lookup screen with the first few letters of the email address (the case doesn’t matter), then click on “Find.” QuickFill displays a list of customers (for whom you have entered email addresses) in alphabetical order by email address. The first customer with an email address that matches the letters you entered is highlighted.

Searching by user ID

To search for a customer by using a user ID, fill in the user ID field with the first few letters of the ID (the case doesn’t matter), then click on “Find.” QuickFill displays a list of customers (for whom you have entered user IDs) in alphabetical order by user ID. The first customer with an ID that matches the letters you entered is highlighted.

Searching by number

QuickFill assigns each customer a number when you first enter them into the database. Similarly it assigns numbers to orders, combination orders and web transactions (for systems with the QuickFill Internet Extensions (QFIE) feature). You can search for any of these things by filling in the ‘Number’ field on the lookup screen and clicking “Find.” The resulting display will vary depending on the type of number you entered.

- For customer numbers QuickFill will display an image of the customer’s mailing label and a list of his subscriptions and prospect records on the bottom of the screen.
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- For order numbers and web ID numbers QuickFill will display an image of the customer's mailing label and a summary of his or her subscription data on the top of the screen. A subscription history and list of orders appear on the bottom of the screen, with the order you selected highlighted.

- For combination orders QuickFill will display an image of the customer's mailing label on the top of the screen and a list of the orders items that are linked to that combination on the bottom of the screen.

Customer list

Below the country code, zip/postal code, name and number fields, you’ll see a section of your customer file.

For each customer in the list, you can see his or her customer number, name, company name, zip/postal code, and country code. If you didn’t record a company name, QuickFill shows the city and state instead. When you search by e-mail address or user ID the state, zip and country columns are replaced by e-mail address or user ID columns. Also, only the customers in your database that have an e-mail address or user ID will be displayed.

The order in which the customers appear depends on what you entered in the lookup screen. If you entered a zip code, the list of customers appears in zip code order. If you entered a customer or company name, the list appears in alphabetical order.

Once you click on a customer in this list, you can use the up- and down-arrow keys to scroll through the list and locate the particular customer for whom you’re looking. You can also use PageUp and PageDown to move through the file faster.
QuickFill has five levels of lookup screens. The first is the initial screen we’ve just discussed. Hidden “behind” this first screen are four other screens. The chart below shows the five levels of lookup screens and the method you use to get to each one. Click on “Back” or press Esc when you’re in any of these subsequent screens, and QuickFill returns you to the previous level. To exit lookup, click on “Close.”
Most transactions are entered in batches to provide greater control, save keystrokes, and make it easier to locate paperwork later on.

Here’s how the batch method gives you greater control: Let’s use the ‘Payments’ transaction as an example. Before you enter your batch in QuickFill, you count the number of payments in the batch and total the dollar amount of these payments. You enter these totals in the payment transaction “batch header.”

Now, as you enter each payment, QuickFill displays a running total of the number of transactions and the dollar amounts you’ve entered. It then compares these totals with the numbers you entered originally in the header. When the totals match, QuickFill tells you that your batch is in balance and asks whether you want to post it. If you click on “Post Now,” it enters these transactions into your database.

But say you enter all your payments and the totals don’t match. Then you know that you probably made an error when entering one or more of the payments. You can easily look through the small group of payments in your batch to locate and fix the error.

You save keystrokes and reduce keying errors when using the batch method because you can enter into the batch header, one time, most characteristics common to the batch. Then, when you enter the actual transaction, QuickFill has already filled in these common fields for you.

Example: Say you’ve created a batch of new orders, all for a term of 12 issues. Enter “12” in the batch header, and you can skip over the ‘Term’ field when you enter each new order—QuickFill has automatically entered the correct subscription term for you.

What happens if you have one new order in the batch with a term of 6 issues? You just enter “6” in the ‘Term’ field for that one transaction. The “6” overrides the “12”—but only for this transaction.

QuickFill lets you stop entering batch transactions at any time and do something else—use ‘Lookup’ to find an order in response to a phone call, say. When you come back to the batch, the transactions you entered so far are still intact, and you can pick up entering where you left off.
Transactions

Batches

Hints for entering batched transactions

We have found through experience that following the guidelines below leads to fewer mistakes:

- Sort your transactions into the four basic batch types: new orders, renewal orders, payments, and prospects.
- Sort these groups into batches with similar characteristics—the same term, the same tracking code, and paid or unpaid, say.
- Count the number of items in each batch. The batch method works best when you keep the batches small—no more than 20 or 30 transactions.
- Run an adding machine tape to total the payment amount (include cash, checks, and credit card charges).
- Enter the number of items and the total (paid) dollar amount into the batch header.
- Enter into the appropriate fields any data common to all items in the batch.
- When you’ve finished entering the batch, QuickFill lets you know if the number of transactions and the total dollar amount you entered match your original batch header entries.
- If they don’t, review your batch of actual transactions to see if you missed or duplicated any, entered an unpaid order as paid or vice versa, or mistyped an amount.

Batch numbers

Each time you enter a batch of transactions, QuickFill assigns a number to that batch. Batch numbers begin with 1 and go to 9999, before starting over again at 1. The batch number makes it easy to locate paperwork for a particular transaction, if you or a customer have a question later on.

After posting your batch, file all the supporting paperwork for the batch together. Include with the batch a cover slip on which you’ve written the date and batch number, the number of items in the batch, and the total payment amount. Each customer’s subscription history shows the batch number for each transaction you entered for that subscription. You can easily find the right piece of paper for the transaction if you need to.

You’ll also find the batch numbers helpful when you run reports. Each report prints at the top of the page the batch number QuickFill most recently assigned. Assuming you don’t have any unposted batches, you can tell whether or not your report includes the transactions from a specific batch. QuickFill assigns a batch number as soon as you start to enter a batch. An unposted batch will still
Transactions

Batches

have a number assigned to it, even though the transactions are not yet in your database.)

Say you run a report and see batch number 170 at the top. You know this report includes all data from batches through number 170. You'll find this feature useful when you're not sure whether you entered a large batch of renewals or payments before or after you ran the renewal or payment rate report.

Starting a batch

To begin entering a batch, click on ‘Transactions’ from the main menu, then choose any of the transactions listed between the horizontal lines, such as ‘New orders’, ‘Payments’ or ‘Renewals’. If you have no unposted batches, QuickFill immediately displays the batch header form. If you have one or more unposted batches, you'll first see a list of these unposted batches. You can then click on “New” to start a new batch. (Your other choices here are “Delete,” “Post now,” “Post later,” and “Change.”)

The date and batch number are on the top line of the batch header form—QuickFill automatically fills in the date and assigns a batch number. The next two lines show a field for the “declared” number of items in the batch and a field for the actual number, a field for the “declared” dollar amount of the batch, and a field for the actual amount. You enter in the ‘Declared’ fields the number of transactions you counted in the batch and the dollar amount you totaled for it. Keep in mind that the dollar amount is the amount paid. The total dollar amount for a batch of unpaid orders should be $0.00.

Under these two lines, you'll see fields where you can enter data that are common to all the transactions in the batch. For example, in the ‘Payments’ transaction, you'll see a ‘Payment type’ field and a ‘Payment amount’ field.

If all the payments in the batch are for the same amount, just enter that amount in the ‘Payment amount’ field to save yourself the trouble of entering the amount for each transaction. It also makes sense to enter in these batch header fields values that are common to most of the transactions. If you know most payments are for $70, for example, but you have two payments for $40, enter $70 in the ‘Payment amount’ field. When you get to the $40 payments, you can override the $70. (If you plan to override some values, it's a good idea to put the transactions with the “odd” values at the beginning of the batch.)

When you've filled in the batch header, press Enter. QuickFill displays a data entry form for the first transaction. After you've filled in this transaction form, click on “OK” to save your entry. QuickFill returns you to the batch header form and shows you a summary of the transaction you've just entered on a line in the bottom half of the screen.
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Select “New” (for “New transaction”), and QuickFill displays another transaction data entry form, so you can enter the next transaction. What happens if you discover you’ve made an error in entering one of the transactions? Use your mouse to double click on the correct summary line for that transaction or click once on the summary line and then click on “Change.” QuickFill shows you the data entry form for that transaction again. Make your changes, and click on “OK” to save them.

If you’ve entered a transaction twice, you can delete one by clicking once on the correct summary line and then clicking on the “Delete” button.

Posting a batch

When you’ve finished a batch, you must “post” it—that is, tell QuickFill to record the transactions in your database. If your batch is in balance—the number of transactions and amount of payments equal the amounts you “declared”—QuickFill asks if you want to post it.

![QuickFill for Windows](image)

*Note: posting batches and running updates in multiuser systems*

On busy systems with several persons working concurrently you should post batches in “later” mode. Posting batches immediately will slow down the other workstations.

- **Post it now** Select this option and then “OK” if you would like QuickFill to post the batch and return you to the unposted batches screen where you can start another batch, if you like.

- **Post it later** Instead of selecting “Post it now” to post the batch immediately you can select “Post it later” and then “OK” to post the batch at a later time. When you do this the batch is placed on the “Tonight’s jobs” job list. When you run
### Transactions

#### Batches

"Tonight's jobs," these postponed batches are posted before the updates and reports are run. (See chapter 13, Jobs, for information on job lists.)

**Continue working**

Select this option and then “OK” if you would like to keep the batch open to change one of the items entered, add another item, or delete an item from the batch.

**Exit**

Select this option and then “OK” if you would like to leave the batch without posting it just yet.

**Errors in a batch**

If QuickFill discovers an error during the scheduled posting, a duplicate payment for example, the problem transactions in the batch are left in the batch on the unposted batches screen. If you go back into the batch you will see that the summary line for each unposted transaction contains a brief error description. You should either delete each unposted item or correct it by clicking the “Change” button.

Say you come to the end of your stack of transactions, and QuickFill doesn’t ask if you want to post the batch. In this case, the number of items or the dollar amount you entered doesn’t match the totals you declared. Check the declared and actual amounts in the header, and review the list of transactions on the screen to make sure you haven’t skipped any transactions, entered duplicates, or left out any payments. If you have, enter the missing transactions, delete the duplicates, or enter the payments to bring the batch into balance.

Sometimes you’ll discover that you miscounted the number of items in the batch or declared the total dollar amount incorrectly. In this case, correct the count or dollar amount on the batch header form and select “OK” to save your changes. QuickFill now shows you a list of all unposted batches. You can then post the batch by clicking on “Post now” or “Post later.” Or you can make changes to the batch by clicking on “Change,” delete the batch by clicking on “Delete,” or enter a new batch by clicking on “New.”

**Incomplete batches**

If you want to stop entering transactions before you’ve finished a batch, press the Esc key from the batch header form and then press it once more to go back to the main menu. If you’re in the middle of a transaction, finish entering data for that transaction and select “OK” to save it in order to get back to the batch header form. But what if you’re in the middle of a transaction and can’t complete it? Press Esc to “throw out” the partially entered transaction and return to the batch header form.

When you want to finish entering transactions for a partially completed batch, select the right transaction type under ‘Transactions’ on the main menu. You’ll then see a list of all unposted batches of that type. Use your mouse to double click on the batch you want to work on or click on the batch once and then click on “Change.”
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You’ll now see a batch header form with a summary of all the transactions you’ve entered so far listed on the screen. Review the list to see where you left off and click on “New” (for “New transaction”) to begin entering the next transaction.

Before you run any updates or reports, check to make sure you’ve posted all your batches. If you haven’t, your update or report won’t include data for these unposted batches. So you may end up, for example, sending out bills for orders that have, in fact, been paid.

To check whether or not you have any unposted batches, select in turn each of the transactions types listed between the horizontal lines on the ‘Transactions’ menu. If, in each case, you see a batch header form instead of a list of unposted batches, you’ll know you posted all your batches.

Unposted batches

You will find yourself on this screen under three circumstances. Whenever you finish a batch of transactions and post it, QuickFill leaves you on this screen. In addition, whenever you leave a batch (and a batched transaction) without posting it, you will be brought to the “Unposted batches” screen the next time you select the transaction for which you have an unposted batch. Finally, there will be times when QuickFill won’t be able to post all the items in a batch. This can occur as a result of problems that arise during the posting of a batch that is being posted “later.” When the posting is complete, any items that were skipped are left in the batch on the unposted batch list.

- Example: Suppose you began with unposted batch number 101 containing 5 new orders with a new tracking code of “TSHOW” and 5 new orders with a tracking code of “ABROAD.” Now let’s say that between the time the orders were entered and now, the tracking code was changed from “TSHOW” to “99TSHW.” During scheduled posting, QuickFill discovers that “TSHOW” no longer exists. When QuickFill finishes posting, you’ll still have an unposted batch number 101, but it will contain only five orders—the ones with a tracking code of “TSHOW.” The batch will now contain 5 orders, each listed with the error message “Tracking code has been renamed or deleted”. You can now work on the batch—that is, change it, add to it, delete it, or post it—in the same way as you would on any other unposted batch.

The batch report you created by the first posting will show 5 orders. If you change the tracking code and post the unposted portion of the batch, the new batch report will be cumulative—that is, it will show the original 5 orders on the report as well as the orders you just posted. So you’ll end up with one report for all of batch number 101.

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Note: post later batches on the “Unposted batches” screen

QuickFill lists batches that have been scheduled to run later with the “Tonight’s job” job list with an asterisk next to them. (See chapter 13, Jobs, for more information on job lists.)

The miscellaneous batch

Not all transactions are entered using the batch method. You enter all the other transactions listed below the second horizontal line on the ‘Transactions’ menu one at a time. These transactions take effect as soon as you enter them. You don’t have to post them.

For reporting purposes, QuickFill lumps together these other transactions into a “miscellaneous batch.” It automatically creates this batch whenever you enter a nonbatched transaction, and no miscellaneous batch is already open.

At the end of each day, close the miscellaneous batch and print the miscellaneous batch report by selecting ‘Close misc batch’ under ‘Accounting’ on the main menu. If you don’t take this step, QuickFill warns you the next day when you start up. If you ignore the warning, the miscellaneous batch will contain transactions from more than one day. The result: You’ll have so many transactions in the batch that it will prove difficult to trace back the paperwork for any one transaction if you need to.

Batch reports

Each time you post a batch, QuickFill automatically creates a batch report describing the transactions in that batch.

The batch report contains as many as three sections. If you don’t want all of these sections in your batch reports you can tell QuickFill which ones to include on the ‘Batch reports’ tab of the ‘Preferences’ screen. See chapter 8, Definitions, p. 8.70, for details.

Part one of the batch report is a transaction log. It shows you the types of transactions you entered and the amounts QuickFill posted to each of your general ledger accounts for those transactions. For each transaction in a batch you’ll see a header line and one or more accounting entries. The header line contains a reference number, the type of transaction, the order number, the publication code, and sometimes a brief description of the transaction—for example, you might see “Current order,” which indicates that the transaction applied to the customer’s current order.

Under the header line, you’ll see accounting entries for each transaction. Each line of accounting data includes the amount of the entry, the name of the account code, and a description of the code. Usually a transaction creates only a single line, but sometimes a transaction can affect more than one order. If this happens, QuickFill creates two batch log entries, but they’ll have the same
Transactions

Batches

reference number. „Payment“, „Transfer“, and „Cancel“ transactions, for example, can generate more than one batch log entry.

You get part two of the batch report only if your batch included payments. This part of the report shows the payer, the payment type, check number or partial credit card number, order number, amount of each payment in the batch, and total payments. This report makes it easier to fill out a bank deposit slip when you deposit your checks. Or your bank may allow you to use the report in place of a deposit slip.

You get part three of the batch report only for new order batches. This part contains a list of the names entered, the publication, term of the subscription, the starting issue, shipping class and the amount due.

Note: no batch report

If you disable all three parts of the batch report, QuickFill won’t generate a report. However, you can always print a report later by selecting „View batch log“ under „Accounting“ on the main menu.

You use „Preferences“ under „Definitions“ on the main menu to specify when QuickFill should print your batch reports. If you have a printer attached to the computer on which you’re entering transactions, you’ll probably want to print the batch report after you post each batch. But if you plan to print the reports on some other computer—or would rather print them all at the end of the day—you can specify, by using „Preferences“, that QuickFill should not print the batch reports automatically when you close the batch. QuickFill then stores these reports, and you can print them whenever you want by choosing „Print..“ under „Reports“ on the main menu.

Note: limit on saved batch reports

You can save up to 500 batch reports in „Print saved reports“. If you have 475 or more saved batch reports, QuickFill will issue a warning that you are reaching the limit of 500 each time you try to post another batch. If you ignore this warning and end up with 500 saved batch reports, you will not be able to post additional batches until you delete some of the saved batch reports.
Chapter 8

Definitions

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- Overviews
  - Marketing
  - Renewal
  - Billing
  - Label split tables
- Issues
- Publications
- Address Matching
- Preferences
Definitions

Definitions menu

You’ll use the items under ‘Definitions’ on the main menu to tailor QuickFill to the needs of your own business. It is here, for example, that you define company and publication names, control pricing and other publication policies, set up promotional offers, and define the codes that track the effectiveness of those promotions. You may have already become familiar with some of these definitions when you created an initial publication (see appendix A for details on creating a publication).

The items you’ll use most frequently are at the top of the ‘Definitions’ menu where you can access them most easily. Under each of the first three items on the menu—‘Marketing’, ‘Renewal’, and ‘Billing’—submenus appear. You use the items in these submenus to define your marketing, renewal, and billing efforts. You’ll change these definitions—or create new ones—fairly often.

As you begin to establish your definitions, we suggest that you begin at the bottom of the ‘Definitions’ menu with ‘Users’ and work your way up to ‘Marketing’. Why? When you get to the items at the top of the menu, you’ll be asked to select tables or codes—for the publication name, for example—that you’ve previously defined. By working your way backward (or upward), you’ll have the critical definitions you need—ones you’ll change infrequently, if at all—when you get to the top of the menu. Think about creating these definitions in the same way you’d think about constructing a house. In both instances, you need to begin by building a firm foundation.

The Definitions menu offers the following commands:

**Marketing**

See p. 8.10 for an overview of marketing definitions.

**Plans**

Marketing plans are used to link a set of tracking codes (defined within the marketing plan definition screen or the tracking code definition screen) together to make up a promotional campaign.

**Tracking Codes**

Each new order entered into QuickFill must have a tracking code. The tracking code is a unique code that helps to identify the promotional piece and list from which an order originated. You should define a tracking code definition
Definitions

for each promotional piece/list combination as well as for some standard means by which orders are originated (i.e., gift subscriptions, drift orders, complimentary subscriptions, etc.).

Offers

Offers are used to indicate the possible terms (number of issues) for which customers may subscribe as well as the price of those terms. You should define an offer for each term (i.e., one-year, two-year, etc.) for which a customer may subscribe. In addition to indicating the term and price in the offer definition, you may also specify premiums available (if any), whether or not free issues are included, and the timing for the first invoice. The offers that you define are used for both new orders and renewal orders.

Premiums

If you have offers for which you offer premiums (such as books, calendars, etc.) to those who subscribe, you should define a premium code for each premium that you offer. The premium code should then be linked to the offer to which it applies. The premiums that you define are used for both new orders and renewal orders.

Lists

Used to define the mailing lists to which you have sent—or plan to send—direct mail promotions. If you define tracking codes for each promotion you send out and link the list to which you mailed to the tracking code definition, you will be able to report on the effectiveness of your mailing to a particular list.

Packages

Marketing package definitions are used to record the contents that make up a package for a promotional piece as well as the cost of the package.

Channels

By defining and using channels, you can indicate the means by which a new order was generated. Channels are also used to indicate the means by which renewal orders are generated—In this case, they are referred to as renewal channels.
Definitions

Definitions menu

<table>
<thead>
<tr>
<th><strong>Renewal</strong></th>
<th>See p. 8.13 for an overview of renewals.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Series</strong></td>
<td>The renewal series definition determines the timing of renewal notices as well as the package and offers to be used and to whom each notice should be sent. Each order must be linked to a renewal series.</td>
</tr>
<tr>
<td><strong>Efforts</strong></td>
<td>Renewal effort definitions are used to specify the package and offers that make up a single renewal effort.</td>
</tr>
<tr>
<td><strong>Packages</strong></td>
<td>Renewal package definitions are used to record the contents that make up a package for a renewal effort as well as the cost of the package. In addition, the renewal package definition determines whether mail-merge or standard renewal notices will be produced and whether the notice for a particular effort will include a credit card block.</td>
</tr>
<tr>
<td><strong>Channels</strong></td>
<td>By defining and using channels, you can indicate the means by which a renewal order was generated. Channels are also used to indicate the means by which new orders are generated—In this case, they are referred to as marketing channels.</td>
</tr>
<tr>
<td><strong>Offers</strong></td>
<td>Offers are used to indicate the possible terms (number of issues) for which customers may renew their subscription as well as the price of those terms. You should define an offer for each term (i.e., one-year, two-year, etc.) for which a customer may renew their subscription. In addition to indicating the term and price in the offer definition, you may also specify premiums available (if any), whether or not free issues are included, and the timing for the first invoice. The offers that you define are used for both new orders and renewal orders.</td>
</tr>
<tr>
<td><strong>Premiums</strong></td>
<td>If you have offers for which you give premiums (such as books, calendars, etc.) to those who subscribe, you should define a premium code for each premium that you offer. The premium code should then be linked to the offer to which it applies. The premiums that you define are used for both new orders and renewal orders.</td>
</tr>
</tbody>
</table>
### Definitions

**Definitions menu**

<table>
<thead>
<tr>
<th>Definition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Messages</strong></td>
<td>The messages that you define are used for both bills and renewal notices.</td>
</tr>
<tr>
<td><strong>Requalification Sources</strong></td>
<td>Requalification sources are used to indicate the means (i.e., wrapper, reader service card, etc.) by which a subscriber was requalified. (This definition may only be accessed from the audit system.)</td>
</tr>
<tr>
<td><strong>Billing</strong></td>
<td>See p. 8.18 for an overview of billing.</td>
</tr>
<tr>
<td><strong>Series</strong></td>
<td>The billing series definition determines the timing of bills as well as the package to be used for each bill, the billing effort at which an order will become suspended for non-payment, and to whom each bill should be sent. Each order must be linked to a billing series.</td>
</tr>
<tr>
<td><strong>Packages</strong></td>
<td>Billing package definitions are used to record the contents that make up a package for a billing effort as well as the cost of the package. In addition, the billing package definition determines whether mail-merge or standard bills will be produced and whether the invoice for a particular effort will include a credit card block.</td>
</tr>
<tr>
<td><strong>Messages</strong></td>
<td>The messages that you define are used for both bills and renewal notices.</td>
</tr>
<tr>
<td><strong>Label Splits</strong></td>
<td>See p. 8.23 for an overview of label splits.</td>
</tr>
<tr>
<td><strong>Split Table</strong></td>
<td>Label split tables are used to define the criteria by which you would like your issue labels to be broken out and printed separately from the main body of issue labels.</td>
</tr>
<tr>
<td><strong>Split Codes</strong></td>
<td>Label split codes are used in label split tables to define groups of labels that must be broken out and printed separately.</td>
</tr>
<tr>
<td><strong>Issues</strong></td>
<td>The issue table is used to keep track of each publication’s publishing schedule. (See p. 8.28 for details on defining issues.)</td>
</tr>
<tr>
<td><strong>Publications</strong></td>
<td>Publication definitions are used to set forth the subscription</td>
</tr>
</tbody>
</table>

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# Definitions

**Definitions menu**

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<table>
<thead>
<tr>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>fulfillment policies that govern each of your publications. The information in the publication definition is used whenever transactions or updates are processed. (See p. 8.36 for details on defining publications.)</td>
<td></td>
</tr>
<tr>
<td>Companies</td>
<td>The company definition is used to record information about the companies that own your publications.</td>
</tr>
<tr>
<td>Services</td>
<td>Service code definitions can be used to designate a type of media for subscriptions sold with accompanying diskettes, or to represent a level of service (i.e., e-mail, fax, courier, etc.).</td>
</tr>
<tr>
<td>Cancel Reasons</td>
<td>Cancel reason code definitions can be used to denote the reason a customer requested cancellation of a subscription.</td>
</tr>
<tr>
<td>Agencies</td>
<td>Used to define the subscription agencies with which you do business. QuickFill will calculate the discount for an agency order based on the rates you enter in the agency definition.</td>
</tr>
<tr>
<td>Tax Rate Tables</td>
<td>If any of your publications are subject to sales tax and you want QuickFill to calculate sales tax, you must define a tax rate table. If you want QuickFill to automatically assign tax rates based on country and postal code, you must also define a tax jurisdiction table.</td>
</tr>
<tr>
<td>Tax Jurisdictions</td>
<td>If any of your publications are subject to tax and you want QuickFill to assign tax jurisdictions based on customers’ country and postal codes, you must define a tax jurisdictions table. You must also define a tax rate table.</td>
</tr>
<tr>
<td>Periodical Class Zones</td>
<td>If any of your publications are mailed at the periodical class postage rate and you want QuickFill to produce a periodical class zone report, you must define a zone table.</td>
</tr>
<tr>
<td>County and SCF Tables</td>
<td>If any of your publications are mailed at the periodical class postage rate and you want to be able to take advantage of in-county and intra-SCF discounts, you must define a county and SCF table in addition to a periodical class zone table.</td>
</tr>
</tbody>
</table>
## Definitions

### Definitions menu

<table>
<thead>
<tr>
<th>Definitions</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Foreign Countries</td>
<td>The foreign countries table is used to define four-character country codes for all countries.</td>
</tr>
<tr>
<td>Zip Codes</td>
<td>The zip code table is used to define the range of zip codes that are valid for each state.</td>
</tr>
<tr>
<td>Address matching</td>
<td>Use the ‘Address matching’ screen to specify the duplicate detection method that you would like to use. Your selections will apply to all of your publications. (See p. 8.59 for details on address matching criteria.)</td>
</tr>
<tr>
<td>Preferences</td>
<td>The preferences definition is used to specify options that apply to all of your publications. For example, you use the ‘Preferences’ screen to choose how you want to display dates.</td>
</tr>
<tr>
<td>Users</td>
<td>Access to the system can be limited by defining user names and passwords for each person who will be using QuickFill.</td>
</tr>
</tbody>
</table>

For details on any of the definition screens, refer to the built-in help system.

### Merging definitions

After you have been using QuickFill for some time you may find that you have defined a large number of tracking codes, prospect lists, and marketing plans, none of which are in use any more. You are no longer interested in the report data listed under these codes, and they are cluttering up the lists displayed when you click on the right mouse button. When you try to delete the old codes you find that QuickFill won’t let you because these codes are still referenced by subscriptions and orders that are in the database.

Although you cannot delete these code definitions, you can consolidate all of them under a single code like “91OLD”. That way you still have some idea of the origin of those subscriptions and orders, although the exact identity and meaning of the original code is lost.

Say you have several tracking codes that were used for a promotion that was mailed in 1991. All of these tracking codes begin with “91AB” (91AB01, 91AB02, etc.). You wish to consolidate all of these codes under the code “91AB”. Here is how to do it:

Select ‘Tracking codes’ from the ‘Definitions’ menu and double click on the first of the codes to be consolidated—let’s say it is named “91AB01”. (You may also click on the code once and then click on “Change.”) Once the definition for the code is displayed, type the new code (91AB) in the tracking code field and click on “OK.” QuickFill will then scan the database and update any subscriptions that are linked to 91AB01 and change them to 91AB. When the update is
Definitions

Definitions menu

complete double click on the next code to be consolidated (say 91AB02). Type 91AB” in the tracking code field again and click on “OK.”

This time QuickFill will ask you the following question:

![QuickFill dialogue box](image)

Respond ‘Yes’ and QuickFill will again scan the database, updating subscriptions that are linked to 91AB02 and changing them to 91AB. Repeat this for each of the remaining codes that are to be consolidated.

When merging codes with dissimilar definitions it is important to understand which definition will be retained. The code definition that you select and change is lost. The code definition that you merge it with is kept.

This procedure for consolidating code definitions works for the following definitions:

- Billing packages
- Billing series
- Channels
- Foreign countries
- Marketing lists
- Marketing packages
- Marketing plans
- Premiums
- Renewal efforts
- Renewal packages
- Renewal series
- Subscription agencies
- Tracking codes

Choosing definition codes

Most of the report filters allow you to use wild cards to select the subscriptions or orders that are to be included in a report. Say you set up your tracking codes so that all of your tracking codes begin with the last digit of the year of the promotion. So your 2004 codes begin with ‘4’ and your 2005 codes begin with ‘5’, and so on. Now you can request a report on the success of your 2006 promotions by entering “6*” in the tracking code field of the report filter.

Refer to “About filter screens” in the built-in help system for more information on using wild cards in report filters. We mention this feature here so that you will keep it in mind when you define your codes.

Replicating definitions

You’ll notice that many of the screens under ‘Definitions’ give you the choice of “replicating” a definition. When you click on an item and then click on...
“Replicate,” you’ll see a copy of the defined item. You can now edit any fields you want.

Replicate is useful when you have items that contain several fields with identical information, such as publications or tracking codes. By replicating, you don’t have to fill in all the fields from scratch. You can simply modify the fields you need to change, then click on “OK” to save your new definition.

Viewing definitions

After you have defined most of your definitions, you may find that it is easier to view a group of definitions (for example, offers) using the Next record and Prior record toolbar buttons; this will allow you to move from the definition of one offer to that of another more quickly. These buttons will work on any definition screen for which you have selected the “Change” option. For example, if you went to ‘Tracking codes’ (under ‘Marketing’ definitions), and double clicked on a particular tracking code to view it, you could then click on the Next record button to display the next tracking code’s definition (the one below it). To display the previous tracking code’s definition (the one above it), you could click on the Prior record button.

See chapter 2, Basics, for more information on keyboard and mouse button options.
Definitions

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Marketing

The definitions you enter under ‘Marketing’ serve two important purposes:

- They let QuickFill know which offers you want to make to new customers.
- They allow you to capture data that QuickFill uses to compare the effectiveness of your various promotions. For example, by entering information here about mailing lists, you can get reports that show how well each list performed. The same goes for packages, premiums, channels, and so forth.

The care with which you enter data here determines how accurate and useful your response, payment rate, and renewal rate reports will be (refer to the built-in help system for details on reports). Put another way, it determines the crucial, detailed marketing data QuickFill gives you when you run reports. For example, what kind of payment rate did the BusinessWeek mailing list produce or how did Package A do versus Package B—depends on the time and trouble you take in filling out these marketing definition screens. So this is definitely not the place to skimp on entering data.

The Importance of Tracking Codes

The key to the usefulness of the QuickFill system is the tracking code. Every new order you enter into QuickFill must have a tracking code. Depending on how completely you fill in the ‘Marketing’ definitions, the tracking code can identify the following elements of your mailing:

- the name of the overall marketing plan you used to get an order;
- the name of the mailing list you used for a direct-mail piece;
- the contents of the package you mailed;
- the channel (direct mail, telemarketing, insert cards, and so forth) you used to obtain an order;
- the price, term, and premium combinations you offered.

As you, of course, know, nearly all publishers use some form of code to identify new orders. The code may contain a lot of information or it may contain very little—just the mailing list from which the order came, for example. Even the name of this code varies from one publisher to another; some call it a source code, some a promo code, and so forth. Because the primary purpose of this
Definitions

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code is to allow you to track what’s happening with your mailings and orders, we call it a tracking code.

When you created similar codes in the past, the name of the code itself most likely captured the information you wanted to know about the source of an order. For example, you may have used a code, such as BUS1FI, which told you the order came from a BusinessWeek list, through mailing package 1, and included the offer of a free issue.

With QuickFill, you don’t have to worry about creating a code name that captures this marketing information. You can make up any name you want for your tracking codes—sequential numbers, say, or combinations of letters and numbers. And, of course, you can continue to use any structure or mnemonic system you’re currently using.

You link the elements you want to track—the mailing list, the channel, the offer, the package, the premium, and so forth—to the tracking code. This code, in effect, serves as a short cut and eliminates your having to actually list all these elements. Think of the tracking code as the trunk of a tree and the branches as the sources of your orders. When you label the trunk, QuickFill automatically knows which branches—or sources—belong to that tree. Similarly, when you enter a new order, you just enter the tracking code that appears on the order card. QuickFill can then track exactly which combination of sources that order came from.

The bottom line? If you define your tracking codes properly, then are conscientious about printing them on every order card you mail, you can get extremely useful reports on the effectiveness of your various marketing efforts.

When you select ‘Marketing’ under ‘Definitions’ on the main menu, you’ll see a submenu with seven items—‘Plans’, ‘Tracking codes’, ‘Offers’, ‘Premiums’, ‘Lists’, ‘Packages’, and ‘Channels’. These are the seven components you can define for marketing purposes.

You need to define only tracking codes and offers to use QuickFill. However, the more items you define, the more useful the reports that you get will be.

If you’re planning a new promotion, we recommend that you first define any channels, packages, lists, or premiums that you intend to use. Next define your offers. Then select ‘Plan’ under ‘Marketing’ and define the tracking codes that will be part of that plan (that is, define these codes on the ‘Marketing Plans’ definition screen). For each tracking code, you can specify the offers, premium, channel, and mailing list you’ll use with that code.

An alternative procedure is to define your tracking codes—that is, on the ‘Tracking codes’ screen, before you define your plan. Then define a plan with no tracking codes. Do this by entering all the components of a marketing plan except the tracking codes and clicking on “OK.” Finally, you link the tracking
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codes to the marketing plan by using the ‘Tracking codes’ screen. This process is quite cumbersome, and we do not recommend it.

For details on the marketing definition screens, refer to the built-in help system.
Renewals

How and when you renew orders is controlled by the renewal series.

What exactly is a renewal series? It is a schedule that tells QuickFill which renewal notices you want to send and when you want to send them. QuickFill links every order in your database to a renewal series that specifies when QuickFill should generate renewal notices.

There are two types of renewal series in QuickFill. The first type, “by days,” generates the first renewal notice based on the number of issues remaining in a subscription. All subsequent notices are generated based on the number of days that have passed since the last renewal notice was generated. The second type of renewal series, “by issues,” generates the first and subsequent renewal notices based on the number of issues remaining in a subscription. Refer to the built-in help system for more information on renewal series.

The diagram on p. 8.15 shows you what a typical “by days” renewal series looks like. The “by issues” renewal series is very similar.

Each series can contain from one to twelve renewal efforts, or mailings. For each effort in the renewal series, you specify the price, term, and premium combinations you want; the package (envelopes, inserts, and so forth) you’ll use; the messages you want printed on the renewal notices; and the number of days that should elapse (or issues that should be remaining for a “by issues” series) before QuickFill generates—and you send—the next effort. You can also specify for each renewal effort whether the renewal notice should go to the bill-to address or the ship-to address(es) or, in the case of agency subscriptions, whether to send the renewal notices to the subscriber or to the agency. For “by issues” renewal series, you can also specify whether or not the renewal notices are to be sent with the issue or separately.

You can define any number of renewal series. How does QuickFill decide which series to use to renew a specific order?

- You must specify on the publication definition renewal tab a default renewal series. QuickFill will use this series for all new orders, unless you override it elsewhere.
- You can specify a renewal series for regular (non-gift) subscriptions as well as one for gift subscriptions on the ‘Tracking codes’ definition screen. If
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you do, QuickFill uses these series, instead of the default series, for all orders you enter with that tracking code.

- You must specify on the ‘Renewal series’ definition screen a “next” renewal series for regular subscriptions, for controlled subscriptions (audit system only), and for gift subscriptions. QuickFill will use these “next” series when orders generated by the renewal series you’re currently defining come up for renewal.
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Overview of renewals

**Renewing gift subscriptions**  
You’ll probably want to use a different renewal series, one containing special messages, for renewing gifts. Therefore, you should link the tracking code you use to enter gifts to a special renewal series.

You’ll notice on the renewal series definition screen a ‘Next renewal series for gifts’ field and a ‘Next billing series for gifts’ field. When it comes time to renew gift orders generated by the series you’re currently defining, QuickFill will use the series you enter in these fields if the order is renewed with a ‘G’ in the ‘Gift/Comp’ field. If the renewal order is no longer a gift subscription, you remove the ‘G’ from the ‘Gift/Comp’ field as part of the renewal transaction so that QuickFill will know to use the regular ‘Next’ renewal and billing series.

For example, say you send the first three efforts in a series to the donor and the donor doesn’t respond, you then send the next three efforts to the donee. If the donor responds, leave ‘G’ in the ‘Gift/Comp’ field when entering the renewal order and QuickFill will use the next series for gifts. If the donee responds, the subscription is no longer a gift, remove ‘G’ from the ‘Gift/Comp’ field when entering the renewal order and QuickFill will use the regular ‘Next’ series.

**Reassigning orders to different renewal series**  
You can reassign a group of orders to a renewal series other than the one to which they were originally assigned by using ‘Change series’ on the ‘Updates’ menu. This capability helps you test which renewal series is most effective (refer to the built-in help system for details on the ‘Change renewal series’ update.). You can also assign individual orders to a different renewal series at the time the renewal is entered or by using the ‘Adjust order’ transaction.

**Default renewal series**  
After you create a new publication, you should go back into the publication’s definition and review the default renewal series. This is the renewal series you specified on the Renewal tab of the publication definition screen. By right clicking on the renewal series field and selecting “Change renewal series,” you can look at the definition of the series. If the series doesn’t do exactly what you want it to do, you can change it on the spot.

Unlike a billing series, a renewal series is specific to a publication. You can have several renewal series, all with the same name, as long as you link them to different publications. That is, you can use the same name—for example, STD—for each publication, even though each series may contain different components.

**Auto renewals**  
If you check the ‘Auto renew orders that use this series’ field on the ‘Links’ tab of the ‘Renewal series’ definition, the renewal update (or issue labels update for “by issues” renewal series) will automatically create renewal orders as if the customer had renewed on the first effort instead of generating a renewal notice. The subscription is automatically renewed when the number of issues remaining in a subscription reaches the point where the renewal series specifies that the first renewal effort should be sent. QuickFill renews the orders as
unpaid and produces a bill for the subscribers the next time you run the ‘Billing’ update.

When using the automatic renewal feature, you can also reuse any credit card numbers that are present, in which case the renewal orders will be marked as paid, and you will get credit card file the next time you run the credit card update. To reuse credit card numbers on orders that are automatically renewed, check the ‘Reuse credit card number’ field on the ‘Links’ tab of the ‘Renewal series’ definition. For more information on automatic renewals refer to “Auto renewal” in the index of the built-in help system.

QuickFill also provides the ability to establish renewals at birth; an extension to a subscription that is solicited at the time of the original order. For example, some publishers offer subscribers extended terms on their bills with wording such as “for only twenty dollars more you can receive an extra twelve issues.” If the subscriber accepts the offer and sends a check for the amount of the original order plus the extension, then you are faced with a dilemma—how do you enter a combination payment and renewal transaction and split the amount of the check appropriately?

The renewal transaction has been designed to handle this situation by allowing you to establish an extra renewal effort that is not part of any renewal series. When you receive a payment from a subscriber who has elected to extend his or her subscription, enter it as a renewal, not a payment, and choose the renewal effort code that you defined for “renewals at birth.” (Refer to the built-in help system for details on how to enter renewals at birth.)


The best way to create a new renewal series is to select ‘Series’, then click on “Replicate” to “clone” an already-defined renewal series, complete with its efforts, packages, offers, premiums, and messages.

Now, when you’re in the ‘Renewal series’ definition screen, you can right click and select “Pick...” to select from a list of existing components you want to use, select “Change...” to change the contents of those components, select “New...” to create new ones, or select “Clear” to remove the contents of those components.

An alternative way to create a renewal series is to first create messages, premiums, offers, channels, renewal packages, and efforts by selecting those items under ‘Renewals’. Then you bring together these separate components by linking premiums to offers and packages to efforts. Finally, you assemble them all on the ‘Renewal series’ definition screen by using the right mouse button in the appropriate fields.

For details on the renewal definition screens, refer to the built-in help system.
Billing

How and when you bill orders is controlled by

- the billing series,
- the minimum bill amount you enter when you define the publication (see p. 8.41 in this chapter for details) and
- the offer to which the customer responds.

What exactly is a billing series? It is a schedule that tells QuickFill what bills you want to send and when you want to send them.

The diagram below shows you what a typical billing series looks like.

Each billing series contains one to eight billing “efforts,” or mailings. For each effort, you specify which package—that is, inserts, envelopes, and so forth—you’ll use for the bill, what messages you want printed on it, and how many days should elapse before QuickFill generates the next bill. You can also specify for each billing effort whether the bill should go to the bill-to address or the ship-to address.
You can define as many different billing series as you want. You can also use one billing series for several different publications as long as you’re careful about publication-specific messages. (Billing series aren’t inherently specific to one publication.) You can, of course, design a series for a specific publication by specifying certain text for the messages.
Definitions

Overview of billing

You can define any number of billing series. How does QuickFill decide which series to use to bill a specific order?

- You must specify on the publication definition billing tab a default billing series. QuickFill will use this series for all new orders, unless you override it elsewhere.

- You can specify a billing series for regular (non-gift) subscriptions as well as one for gift subscriptions on the ‘Tracking codes’ definition screen. If you do, QuickFill uses these series, instead of the default series, for all new orders you enter with that tracking code.

- You must specify a billing series for regular and gift renewal orders on the ‘Renewal series’ definition screen. QuickFill uses these series, instead of the default series, for all renewal orders you receive from that renewal series.

QuickFill bills orders, not subscriptions (see chapter 7, Transactions, p. 7.11, for an explanation of subscriptions and orders). For example, say you accept an unpaid renewal of a subscription that still has an amount due on the previous order. You now have a subscription with two orders (the old order and the renewal order), both with amounts due. QuickFill bills one order at a time, beginning with the first order that has an amount due. It bills the second order only when the first order has been paid for or written off.

The timing of your first bill is governed by two factors:

- Your entries in the publication definition billing tab. Here, you choose either to send the first bill in the same envelope as the first issue, to send the bill immediately upon receipt of the order, or to send the first bill a certain number of days after you serve the first issue.

- Your entry in the ‘Offers’ definition screen. Here, you can override whatever timing option you selected when you defined your publication. That is, you can tell QuickFill to send the first bill immediately, with the first issue, or to wait a certain number of days before sending the first bill—even if you made the opposite choice in the publication definition billing tab. In addition, you have a third option here: You can tell QuickFill not to send a bill until a specific date: For example, “no bills until January 1.” This option is useful for special promotions.

For subsequent bills, your entry in the billing series definition tab tells QuickFill how many days you want to elapse between bills.

Generally, QuickFill produces the first bill for a renewal order the first time you run the ‘Billing’ update after you enter the renewal. The exceptions are if you have specified a date in the ‘Earliest date’ field on the offers definition screen.
or, if you have selected the ‘Delay the billing of renewal orders until after their first issue has been served’ field on the publication definition billing tab.

**Suspending orders for nonpayment**

When you define the billing series, you also specify the number of bills you want to send before QuickFill suspends a subscription for nonpayment. When QuickFill generates the effort you specify—and presumably, you’ve sent this bill to the customer—QuickFill automatically suspends the subscription. QuickFill will then no longer generate issue labels for that subscription until you record that you’ve received payment. Of course, QuickFill continues to generate bills for the subscription—and you continue sending them. When you’ve sent all the efforts you’ve defined in the billing series—and still haven’t received payment—QuickFill cancels the subscription and writes off the amount due.

**Cancel bills**

You can send one more bill after QuickFill cancels a subscription for nonpayment. This “cancel bill” is for an amount equal to the value of the issues that you’ve already sent the customer. You choose whether or not to send a cancel bill on the publication definition billing tab (see p. 8.42 in this chapter for details on setting the cancel bill policy).

**Reassigning orders to different billing series**

You can reassign a group of orders to a different billing series from the one to which it was assigned originally by using ‘Change series’ on the ‘Updates’ menu. This feature helps you test which billing series is most effective (refer to the built-in help system for details on the ‘Change billing series’ update). You also can assign individual orders to a different billing series at the time the order is entered or by using the ‘Adjust order’ transaction.

**Default billing series**

After you create a new publication, you should go back into the publication’s definition and review the billing series that the publication uses for normal orders. (You specify the billing series on the ‘Billing’ tab of the publication definition screen.) By clicking on the billing series field and selecting “Change billing series,” you can look at the definition of the series. If the series doesn’t do exactly what you want it to, you can change it on the spot.

Be careful, though, if other publications also use this series. The current definition of the series may contain messages specific to a particular publication. In this case, escape from the ‘Billing series’ screen by pressing Esc, right click and select “New billing series” to create a new billing series. Or you can escape from the publication definition and select ‘Billing’ under ‘Definitions’ on the main menu. Then select ‘Series’ under ‘Billing’ to replicate and modify an existing series. If you do create a new series (either from scratch or by using ‘Replicate’), remember to go back to the publication definition billing tab and link your publication to the new series.

**The Billing menu**

When you select ‘Billing’ under ‘Definitions’ on the main menu, you’ll see a submenu with three items: ‘Series’, ‘Packages’ and ‘Messages’.

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**Definitions**

**Overview of billing**

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Definitions

Overview of billing

The packages and messages you define here are part of the billing series. The best way to create a new billing series is to select ‘Series’, then click on “Replicate” to “clone” an already-defined billing series complete with packages and messages.

Now, when you’re in the ‘Billing series’ definition screen, you can right click and select “Pick...” to select from a list of predefined packages or messages, “New...” to create new packages or messages, “Change...” to change the packages or messages now in the package and message fields, or “Clear” to remove the packages or messages currently in the field. Remember, if you change the packages or messages, it will affect all other series that use those same packages and messages.

An alternative way to create a billing series is to first select ‘Packages’ and then ‘Messages’ under ‘Billing’ to define the packages and messages. Then you can select ‘Series’ to create a series using the packages and messages you’ve just defined.

For details on the billing definition screens, refer to the built-in help system.
Label split tables

Label split tables are used to define groups of issue labels that must be broken out and printed separately from the main body of issue labels.

Possible uses for a label split table include:

- Issue wrappers. You want to place a special wrapper on the last few issues of a subscription that is about to expire.

- Regional editions. You want to create special editions of your publication that are sent to subscribers in specified regions.

- Free trials. You want to place a special wrapper or an insert on copies that are sent to trial subscribers.

- New order acknowledgments. You want to include a “welcome aboard” letter with the first issue of new orders.

- Special services. You sell your publication with optional special services, such as CDs. You need to print two issue labels for these subscriptions—one for the issue and one for the CD.

Each row of the table contains values and codes that are compared to each subscription that is served an issue by the issue label update. If a match is made, then the label is split off into the group specified by the split code in the first column. If a subscription matches more than one filter row, then the first matching row is used; the priority of the table is from top to bottom. If a subscription matches none of the filter rows, then by default it is placed in the main group of labels.
## Definitions

### Overview of label split tables

*Example:* You want to place a special wrapper on the final issue of your expiring subscribers. The table should look like this:

<table>
<thead>
<tr>
<th>Description</th>
<th>Pub A Split Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Split Code</td>
<td>File</td>
</tr>
<tr>
<td>1</td>
<td>FINAL</td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td></td>
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<tr>
<td>9</td>
<td></td>
</tr>
<tr>
<td>10</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td></td>
</tr>
</tbody>
</table>

*Example:* You send two grace issues to expired subscribers. You want to place a special wrapper on those issues. The table should look like this:

<table>
<thead>
<tr>
<th>Description</th>
<th>Pub A Split Table</th>
</tr>
</thead>
<tbody>
<tr>
<td>Split Code</td>
<td>File</td>
</tr>
<tr>
<td>1</td>
<td>WRAP</td>
</tr>
<tr>
<td>2</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td></td>
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<tr>
<td>8</td>
<td></td>
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<tr>
<td>9</td>
<td></td>
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<tr>
<td>10</td>
<td></td>
</tr>
<tr>
<td>11</td>
<td></td>
</tr>
<tr>
<td>12</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td></td>
</tr>
<tr>
<td>14</td>
<td></td>
</tr>
<tr>
<td>15</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td></td>
</tr>
<tr>
<td>17</td>
<td></td>
</tr>
</tbody>
</table>
Definitions

Overview of label split tables

Example: You want to put a special wrapper on the last two issues of expiring subscriptions. The wrapper for new subscribers should be different from the wrapper for subscribers that have renewed at least once. You define two wrapper groups named “NWEXP” and “RNEXP”.  

Example: You want to create a “West Coast” edition of your publication. You create a label split table that splits off the California, Oregon, and Washington subscribers into a group that you name “WEST”. The table should look like this:
Definitions

Overview of label split tables

Example: You want to place a special wrapper on the issues of your trial subscribers. Your trial subscriptions all have a term of four issues. The table should look like this:

![Image showing a label split table]

When you select ‘Label splits’ under ‘Definitions’ on the main menu, and then select ‘Split Table’, you’ll see one of two screens. If you select ‘Split Table’ for the first time after installing QuickFill, you’ll see a screen with a blank form for defining the label split table.

If you’ve already defined some label split tables, you’ll see a list of them in the upper portion of the screen and the “New,” “Change,” “Replicate,” and “Delete” options running along the bottom.

If you haven’t yet defined any label split tables, enter a description, fill in the blank form, and click on “OK” to save your changes.

You can define another label split table by clicking on “New,” filling in the fields, and then clicking on “OK.” If the label split table you want to define next is similar to one you’ve already defined, you can replicate the existing table by moving the cursor to it and clicking on “Replicate.”

Five special buttons are available when filling in the rows of the issue label split table. The “Move Up” and “Move Down” buttons allow you to change the position of a row in the table by moving it up or down respectively. The “Insert Row” button inserts a blank row above the position of the cursor. The “Delete Row” button deletes the row that the cursor is on and moves the remaining rows up. The “Add Row” button adds a row to the end of the split table.
Definitions

Overview of label split tables

You can also cut or copy rows from a split table and then paste them into a different spot on the same table, to another table (in the same database or in a different database), or to another application. To select and cut or copy rows, left click in the column to the left of the split code for the first row you want to select, hold down the mouse button, drag the mouse to select additional rows, and then use the “cut” or “copy” command (you can either use the toolbar buttons or combination keys, CTRL-X and CTRL-C). The rows that were selected will be stored on your computer’s clipboard in a tab-delimited format. You can then go to the split table or application to which you want to add the rows and use the “paste” command (again, you can either use the toolbar button or combination keys, CTRL-V). The rows will be inserted above the cursor so be sure to move the cursor to the desired spot before using the “paste” command.

You link label split tables to a publication’s definition. (See this chapter, p. 8.50, for details on the ‘Label group split table’ field.) In most cases you will define a separate split table for each publication. Sometimes you may have similar issue label requirements for several publications, in which case you can link the same split table to each publication.

Label split codes

Label split codes are used to identify groups of labels that have been broken out so that they may be printed separately.

For details on all of the fields in the label split table as well as more information on label split codes, refer to the built-in help system.
Issues

On the ‘Issues’ definition screen, you define the issues for a publication. (Collectively, the issues for a publication are referred to as that publication’s issue table.) QuickFill needs these issue definitions to keep track of your publishing schedule.

To give you maximum flexibility, QuickFill makes no assumptions about your schedule. It will accommodate you if you publish on a regular quarterly, monthly, weekly, or daily schedule. But you could also put out a publication 13 times a year or every third Tuesday.

You define issue numbers and dates for each of your publications. You must define issues for your current issue and for enough future issues to cover your longest subscription. You must also define back issues for as far back as the oldest subscriber that will be converted into your QuickFill database. The issue number is simply a sequential number that QuickFill uses to compute the issue with which each order expires. (For each subscription, QuickFill keeps track of the issue number of the next issue that you’ll send to that subscriber and of the number of issues remaining in the subscription.) The issue date can be anything you want.

Defining issues
When you select ‘Issues’ under ‘Definitions’ on the main menu, you’ll see a screen listing the publications defined in your database and the issue table for the first publication (alphabetically). To view the issue table for a different publication, click on that publication in the ‘Pub Code’ field.

For each issue in your issue table, you will see the issue number and issue date. In addition, you will be able to see the location of the current and new orders pointers (described below) as well as “Current issue,” “New orders issue,” “Add issues to End,” “Insert issue,” “Delete issue,” and “Change issue” buttons. (If you are in the audit system and you are looking at the issue table for an audited publication, you will also see the audit and expire pointers and the “Controlled expire” and “Audit issue” buttons.)

Adding new issues
When QuickFill displays the issue table, you can create another issue by clicking on “Add issues to End.” If you did not use one of the preferred formats (described below) to define the most recent issue, a screen like the one on page 8.32 will appear, enter the information for the issue that you would like to define, and click on “OK.”
If you did use one of the preferred formats for the issue date of the most recent issue, you can create multiple issues at once. The screen that appears asks how many issues you would like to add to the end of the list. Enter a number and click on “OK.” QuickFill will automatically create that number of issues. It will use the same issue date format you used for the most recent issue and it will space the issue dates according to the number of issues per year you entered on the publication definition general tab.

*Remember:* The issue table should always continue far enough into the future to cover the expiration date of the longest subscription that you expect to enter into QuickFill.

You can, however, add issues as you need them. If you don’t have enough issues in the issue table to cover the expiration of your longest subscription, you’ll get a warning when you run the ‘Billing’, ‘Issue labels’, or ‘Renewal notices’ update. QuickFill also warns you if you try to enter an order that requires more issues than you’ve defined.

**Inserting issues**

If you would like to insert an issue in the middle of the table, you may click on “Insert issue” to insert an issue where the cursor is currently located. Enter the appropriate information and click on “OK” when you are done. QuickFill will automatically renumber the remaining issues in the issue table. You cannot insert an issue between two issues that have already been served.

*Warning: changing publication frequency*

The ability to add and insert new issues is helpful if you have changed the frequency of your publication and you need to add future issues. However, changing your publication frequency requires you to resolve problems involving how your existing subscriptions will be fulfilled. If you change from a bimonthly to a monthly, your subscribers may be upset if they receive only six issues or six month’s worth of service when they originally subscribed for one year. We urge you to call CWC Software before attempting to change your publication frequency.

**Deleting issues**

To delete an issue from the table, move the cursor to the issue that you would like to remove from the table and click on “Delete issue.” QuickFill will automatically renumber the remaining issues in the issue table. You cannot delete an issue from the table if it has already been served.

There’s no need to ever delete old issues from the issue table. The issue definitions don’t occupy much disk space, and they provide useful historical information concerning the number of copies you served of this publication.

**Changing an issue**

You can change the definition of an issue by moving the cursor to the issue you want to change and double clicking on the issue, or clicking on “Change issue.” You can then change any of the fields you want, except for the issue number.

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Definitions

Issues

Setting the current and new orders issue pointers

When you look at the issue table, you’ll see two “pointers”: the “Current issue” pointer and the “New orders issue” pointer. (If you have the audit system, you will see two additional “pointers;” they are described on p. 8.34.)

Set the “Current issue” pointer by moving the cursor to the issue you want and clicking on “Current issue.”

Set the “New orders issue” pointer by moving the cursor to the issue you want and clicking on “New orders issue.”

The “Current issue” pointer tells you the most recent issue for which you’ll get labels when you run the ‘Issue labels’ update. So if the “Current issue” pointer is set on issue #1, QuickFill will generate labels for subscribers who should receive issue 1 (the current issue) when you run the ‘Issue labels’ update. (Running the update also produces back-issue labels if you need them.) Of course, QuickFill keeps track of the last issue it serves for each customer and never generates a label for the same customer for the same issue twice. That means you can run ‘Issue labels’ to produce labels for new orders without worrying about getting labels for orders you’ve already fulfilled. (See chapter 9, Updates, p. 9.22, for details on the ‘Issue labels’ update.)

When you enter a late renewal (a renewal where the customer has already missed some issues), QuickFill’s default is to start the renewal order with the current issue, unless you specified a number other than 0 for backstarts or an issue at which to start the renewal. (See this chapter, p. 8.41 and p. 8.46, for details on the backstart policy field for reinstated orders and the backstart policy field for renewal orders respectively.)

The “New orders issue” pointer tells you which issue QuickFill uses to start new orders. You can override this issue when you enter an order. Say the “New orders issue” pointer is set to issue #36. That means, when you enter a new order, QuickFill begins that order with issue 36.

Warning: setting the pointers

You must set the “Current issue” and “New orders issue” pointers manually. QuickFill won’t set them for you unless you select the options to advance these pointers automatically; this is done on the ‘Issue labels’ update screen.
Definitions

Issues

**Issue definitions** If you select “Insert issue” or select an issue and click on “Change issue,” you’ll see a screen that looks like the following one.

![Issue definition screen](image)

**Issue number** Most publishers define the first issue as issue number one. But you can give the first issue any number you want. QuickFill then automatically assigns sequential numbers to the issues that you define after the first one. If you are converting an existing publication from another fulfillment system, do not define the current issue as issue number one. Instead, the oldest start issue in the subscriptions being converted should be issue number one.

**Issue date** Most people refer to an issue by the issue date—Spring 2006, say. The format of this date, of course, varies considerably depending on the type of publication and its frequency. You might, for example, use the names of the four seasons for a quarterly publication and the actual date of publication for a weekly. Each issue number has a corresponding issue date that you define. The expiration date that appears on renewal notices (except for books and conferences) and invoices comes from the issue date field.

Because the format of an issue date can vary so much, QuickFill doesn’t restrict the format you can use. However, if you use one of the “preferred” formats we describe below, you’ll find it much quicker to add issues to the issue table. That’s because you can then use the “add to end” feature to automatically create large numbers of issues that extend far into the future (we describe the issue table and the ‘add to end’ feature above). If you don’t want to use one of
Definitions

Issues

these preferred formats, you don’t have to; but you’ll have to type in the issue date for each issue you add to the issue table.

Here are the preferred formats for issue dates:

<table>
<thead>
<tr>
<th>Type</th>
<th>Format 1</th>
<th>Format 2</th>
<th>Format 3</th>
<th>Format 4</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daily, Weekly, and Semimonthly</td>
<td>1-1-2005</td>
<td>1 JAN-05</td>
<td>JAN-1-05</td>
<td>1-05</td>
</tr>
<tr>
<td></td>
<td>1-1-05</td>
<td>JAN 05</td>
<td>JAN 1 05</td>
<td>JAN/1/05</td>
</tr>
<tr>
<td></td>
<td>1-JAN-2005</td>
<td>1 JAN 2005</td>
<td>JAN/1/2005</td>
<td>JAN012005</td>
</tr>
<tr>
<td>Monthly</td>
<td>1-05</td>
<td>JAN 05</td>
<td>JAN/05</td>
<td>JAN05</td>
</tr>
<tr>
<td>Bimonthly</td>
<td>1-05</td>
<td>JAN 05</td>
<td>JAN/05</td>
<td>JAN05</td>
</tr>
<tr>
<td></td>
<td>JAN/FEB-05</td>
<td>JAN/FEB 05</td>
<td>JAN/FEB/05</td>
<td>JAN/FEB05</td>
</tr>
<tr>
<td></td>
<td>JAN FEB-05</td>
<td>JAN FEB 05</td>
<td>JAN FEB/05</td>
<td>JAN FEB05</td>
</tr>
<tr>
<td>Quarterly</td>
<td>SPRING-05</td>
<td>SPRING 05</td>
<td>SPRING/05</td>
<td>SPRING05</td>
</tr>
<tr>
<td></td>
<td>SPRING-2005</td>
<td>SPRING 2005</td>
<td>SPRING/2005</td>
<td>SPRING2005</td>
</tr>
</tbody>
</table>

Calendar date  The date that appears on the cover of the issue; there are no restrictions on this field and it may initially be left blank. If you do decide to leave it blank, QuickFill will automatically enter a date in this field for you (for monthly publications the first of the month will be used, for quarterly publications the first day of the first month of the quarter will be used). In addition, QuickFill will verify that the ‘Calendar date’ field has been filled in for the current issue when the ‘Issue labels’ update is run.

Update date  This field contains the date of the most recent ‘Issue labels’ update that served copies for this issue. When looking at issues that have yet to be served, the ‘Update date’ will be blank. You cannot enter or edit this field.
Enter the volume number of the issue. You can use any format you want, including roman numerals. This number is for your information only. QuickFill doesn’t use the volume number.

Enter the issue number within the volume number you just entered. You can use any format you want. This number is for your information only. QuickFill doesn’t use the issue number. Don’t confuse this field with the issue number field we describe above.

You have two lines available to describe the issue in any way you want. You might want to briefly summarize the contents of the issue, for example. The entry in this field is for your information only. QuickFill doesn’t use the description in any way.

The entries in these fields are also for your information only. QuickFill doesn’t use this data.

You can’t make an entry in these fields. QuickFill automatically updates these four fields when you run the ‘Issue labels’ update. QuickFill counts as free any copy served from an order with a zero price that is not marked as complimentary.

You can enter numbers in these two fields to account for the number of single copies sold at news stands or that were distributed at trade shows or conventions. This is useful if your publication is audited and you want to include these single copies in your total circulation on the ‘Publisher’s statement’ report.

You can’t make an entry in these fields. QuickFill automatically updates the ‘as current issue’ and ‘as back issue’ fields with the income earned according to the cash accounting method and the accrual accounting method respectively when you run the ‘Issue labels’ update for an issue. This information is also reported in the ‘Issue summary’ report.

Note: earned income reported on the ‘Issues’ definition screen

The earned income fields on the ‘Issues’ definition screen only take into account income earned by running the ‘Issue labels’ update whereas the earned income reported in the ‘General ledger’ report takes into account income earned by running the ‘Issue labels’ update as well as that which is earned by processing transactions (such as adjustments). Therefore, it is not likely that the earned income shown here will match the earned income reported in the ‘General ledger’ report.

Once you’ve defined or changed an issue, click on “OK” to save your changes.

### Definitions

#### Issues

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Volume</strong></td>
<td>Enter the volume number of the issue. You can use any format you want, including roman numerals. This number is for your information only. QuickFill doesn’t use the volume number.</td>
</tr>
<tr>
<td><strong>Issue</strong></td>
<td>Enter the issue number within the volume number you just entered. You can use any format you want. This number is for your information only. QuickFill doesn’t use the issue number. Don’t confuse this field with the issue number field we describe above.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>You have two lines available to describe the issue in any way you want. You might want to briefly summarize the contents of the issue, for example. The entry in this field is for your information only. QuickFill doesn’t use the description in any way.</td>
</tr>
<tr>
<td><strong>Mailing weight</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Number of pages</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Number of ad pages</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Paid copies, Free copies, Complimentary copies, Total copies (served)</strong></td>
<td>You can’t make an entry in these fields. QuickFill automatically updates these four fields when you run the ‘Issue labels’ update. QuickFill counts as free any copy served from an order with a zero price that is not marked as complimentary.</td>
</tr>
<tr>
<td><strong>Single copies sold, Trade shows/conventions</strong></td>
<td>You can enter numbers in these two fields to account for the number of single copies sold at news stands or that were distributed at trade shows or conventions. This is useful if your publication is audited and you want to include these single copies in your total circulation on the ‘Publisher’s statement’ report.</td>
</tr>
<tr>
<td><strong>Earned income</strong></td>
<td>You can’t make an entry in these fields. QuickFill automatically updates the ‘as current issue’ and ‘as back issue’ fields with the income earned according to the cash accounting method and the accrual accounting method respectively when you run the ‘Issue labels’ update for an issue. This information is also reported in the ‘Issue summary’ report.</td>
</tr>
</tbody>
</table>

Note: earned income reported on the ‘Issues’ definition screen

The earned income fields on the ‘Issues’ definition screen only take into account income earned by running the ‘Issue labels’ update whereas the earned income reported in the ‘General ledger’ report takes into account income earned by running the ‘Issue labels’ update as well as that which is earned by processing transactions (such as adjustments). Therefore, it is not likely that the earned income shown here will match the earned income reported in the ‘General ledger’ report.

Once you’ve defined or changed an issue, click on “OK” to save your changes.
Definitions

Issues

Defining issues in the audit system

In addition to issue pointers for new and current issues, the audit system also has an “Audit issue” pointer and a “Controlled expire” issue pointer. When you run the ‘Issue labels’ update for an audit issue, the update creates a galley data file containing audit data for the issue.

The “Controlled expire” issue pointer is used to define a default issue at which controlled subscriptions should expire. You may override this default at the time the controlled subscription is entered.

Controlled expire issue pointer

When entering a controlled subscription in QuickFill, you don’t specify a term, such as 12 or 24 issues. Instead, you enter a start issue and an expiration issue; QuickFill computes the number of issues to be served based on the start issue and expiration date. The “Controlled expire” issue pointer defines the default expiration issue for new or requalified controlled subscriptions, that is, the issue with which a new controlled subscription will expire unless you override it. Usually you will set the “Controlled expire” issue pointer to the last issue before the audit issue that is at least three years after the current issue.

To set the “Controlled expire” issue pointer, you simply move the cursor to the issue you want to designate as the expiration issue and click on “Controlled expire”.

Example: Let’s say your publication issues a publisher’s statement every June and December. Controlled subscriptions that start between November 2005 and April 2006 should expire with the April 2009 issue. Controlled subscriptions that start in May 2005 through October 2006 should expire with the October 2009 issue. This way you keep subscribers active for the maximum allowable three years before they must be dropped if they haven’t requalified. If, however, your policy specifies that controlled subscriptions expire after one or two years, you can set the expire issue accordingly. You can also use the ‘Cancel subscriptions’ update to cancel controlled subscriptions before their normal expiration date.

Audit issue pointer

Use the “Audit issue” pointer to define the audit issues for your publication. It is important to define your audit issues as such because QuickFill uses the “Audit issue” pointers to determine the issues for which a galley data file should be created. To set the “Audit issue” pointer, move the cursor to the appropriate issue and click on “Audit issue.” If you click on “Audit issue” again, the “Audit issue” pointer will be removed from the issue. You can define as many audit issues as you would like by moving the cursor to each of the appropriate audit issues and clicking on “Audit issue” each time.
Definitions

Issues

Note: audit issue pointer

When an issue is defined as an audit issue, a galley data file is created when the ‘Issue labels’ update is run for that issue. The galley file’s name is made up of the database name, publication code, and issue number. For example, if your audit issue for publication code WIDGET in the standard QuickFill database (that is the database files are named QFWDB*.QFDAT) was issue #144, the galley data file would be named QFWDB_WIDGET_0144.QFDAT. You use the galley data file to create a test selection for your auditor by running the ‘Audit issue galley’ report; this file is located in the database directory. See chapter 9, Updates, p. 9.31, for more information on the galley data file.
Definitions

Publications

Most of the subscription fulfillment policies that govern your publications are defined on the ‘Publications’ definition screen. Both ‘Updates’ and ‘Transactions’ use this information.

The publication definition is divided into five tabs (General, Billing, Renewal, Shipping, and Issue labels), but you can see only one tab at a time. (The publication definition in the audit system contains a sixth tab labeled “Audit.”) You can move easily between tabs by using the Ctrl-RightArrow and Ctrl-LeftArrow key combinations or your mouse.

To define a new publication from scratch, click on “New.” When you create a new publication, the billing and renewal tabs mentioned below do not appear. QuickFill automatically links the new publication to the “STD” billing series (or, if there is no “STD” billing series, the new publication will automatically be linked to the first billing series listed on the “Billing series” screen) and creates a new “STD” renewal series. After the new publication has been created, you can go back and create a different billing series and/or edit the renewal series created for the publication.

You can also click on “Change” to make changes to an existing publication, “Replicate” to replicate an existing publication, or “Delete” to delete a publication from your database. You cannot delete a publication for which you’ve already entered orders.

Note: entering or changing data on the publication definition screens

To enter or change a value in any field, just move the cursor to that field and enter the new value. In some cases, you can use function keys or the right mouse button in a field to select from a list of values, add a new value, change the definition of the current value, or clear out the existing value altogether. When you’re through entering or changing information in any of the publication definition tabs, you can click on the tab to which you would like to move, click on “Cancel” to discard your changes, or click on “OK” to save all your changes.
This tab contains information for your publication (such as the publication code, name, type, etc.).

**Publication code**
Enter up to a six-character code for your publication. (You can use both letters and numbers and any other characters—a dash, say—that you want.) QuickFill uses this code when it doesn’t have enough space to display a publication’s full name—in the lookup tabs, for example.

*Warning: Avoid using asterisks and questions marks in publication codes*

When you run reports in QuickFill, you have the ability to use wild cards (asterisks and question marks) to select similar publication codes (as well as other codes). For example, let’s say that you have two publication codes that begin with the letter “A.” To produce a report with information from both of these publications you could enter “A*” in the publication code field on the report filter. This lets QuickFill know that you want information for all publication codes that begin with the letter “A.”

Now, let’s say that you set up a third publication using “A*” for the publication code. Every time you enter “A*” in the publication code field of a report filter, QuickFill will report on all publications that begin with the letter “A.” There is no way to produce a report only for publication code “A*.” For this reason, you should avoid using asterisks or question marks in your publication codes. (See chapter 10, *Reports*, p. 10.14, for more information on wild cards.)

**Pub name**
You have two 30-character fields in which to enter the name of the publication. QuickFill prints the name exactly as you enter it here—including the break between the lines—on bills, renewal notices, credit card forms, and reports.

**Company name**
This is the company that “owns” this publication. You cannot type directly in this field. Instead, right click and then select “Pick company” to choose from a list of companies you’ve already defined; select “New company” to create a new company; select “Change company” to change the definition of the company now in this field (be very careful when using the “Change company” option as the definition of the company will be changed in every place that it is used); or select “Clear” to remove the company that is currently in this field. QuickFill prints the company name and address you enter in this field on bills, renewal notices, and credit card forms. QuickFill also uses this company name for extracting journals and for closing accounting periods and years (refer to the built-in help system for details on the ‘Journal extract’, ‘Close period’, and ‘Close year’ accounting functions.)

**Checks payable to**
Enter the name to which you want your customers to make checks payable. QuickFill prints this name on bills and renewal notices, preceded by the phrase...
## Definitions

### Publications

“Check payable to:” (if you leave this field blank, the phrase “Check payable to:” won’t be printed on bills and renewal notices). For customers in Canada, Great Britain, United Kingdom, England, Scotland, or Wales, the spelling of “check” is changed to “cheque.”

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Issues per year</strong></td>
<td>QuickFill lets you use any publication schedule you want, including an irregular one. Enter in this field the number of issues that you publish in a normal year. You determine the actual schedule of publication dates when you define the issues for the publication, by using ‘Issues’ on the ‘Definitions’ menu. QuickFill uses the number you enter here only to calculate the spacing of issue dates when you define several issues at a time using the “add to end” option on the ‘Issues’ definition screen (refer to the built-in help system for details on defining issues).</td>
</tr>
<tr>
<td><strong>Is this publication active – Should updates be allowed?</strong></td>
<td>You can change the entry in this field at any time. Check this field if this publication is active and you would like to be able to run updates for it. Leave this field blank, and you won’t be able to run any updates for this publication. It’s a good idea to leave this field blank if you’re test-mailing a publication. You can enter orders and collect data on responses, but you won’t “accidentally” run updates.</td>
</tr>
<tr>
<td><strong>Is this publication active – Should orders be accepted?</strong></td>
<td>You can change the entry in this field at any time. Check this field if this publication is active and you would like to be able to enter orders for it. Leave this field blank, and you won’t be able to enter orders for this publication. It’s a good idea to leave this field blank if you’re discontinuing a publication. You can enter payments, prospects, and any miscellaneous transactions for the publication, but you won’t be able to enter new orders, renewal orders, controlled subscriptions, or requalifications.</td>
</tr>
<tr>
<td><strong>Edit Web Definition</strong></td>
<td>This button is only present for users of the QuickFill Internet Extensions (QFIE). Click the button to access the publication policies that are stored on the QFIE server.</td>
</tr>
<tr>
<td><strong>Export this publication to the web server</strong></td>
<td>This field is only present for users of the QuickFill Internet Extensions (QFIE). Check this box to indicate whether or not you want the definitions for the publication to be exported to the QFIE web server. Publications for which you do not wish to accept orders over the Internet should not be exported to the QFIE server.</td>
</tr>
<tr>
<td><strong>Publication type</strong></td>
<td>The publication type affects some of the wording on the bills and renewal notices. For example, the term for a periodical would be described as a number of issues whereas for a conference it would be described as a number of</td>
</tr>
</tbody>
</table>
Definitions

Publications

sessions. See appendix C, *Form Samples*, for more details on how the publication type affects the wording on bills and renewal notices.

QuickFill generates different bills and renewal notices for periodicals, books, services, conferences, membership organizations, and online services. Here we define a periodical as any publication for which you offer customers a fixed number of issues in a subscription; a book as a one-shot publication; and a service as a publication with a fixed term (one year, for example) but without a fixed number of issues.

Here are some examples: A monthly newsletter would be a periodical, a book without any supplements or updates would be a book, and a loose-leaf that you update as needed and sell for a one-year term, would be a service.

Online services have "users" instead of "copies." Memberships are like services but have "members" instead of "copies." Conferences are like books but have "registrants" instead of "copies." Orders entered for books and conferences should always have a term of one.

To select a publication type, simply click on the field for that type.

**Pricing method**

QuickFill supports two styles of pricing: unit pricing and stepped pricing. These methods differ only in the way orders for multiple copies are priced. The best way to describe them is by example.

**Unit pricing:**
- Single copy orders are $100
- Orders for 2–9 copies are $90 per copy
- Orders for 10–19 copies are $85 per copy
- Orders for 20 copies or more are $82 per copy

**Stepped pricing:**
- The first copy is $100
- Copies 2–9 are $90 each
- Copies 10–19 are $85 each
- Copies 20 and over are $82 each

Here is a table that shows the effects of these two pricing schemes for a variety of different order quantities.

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Unit price</th>
<th>Stepped price</th>
</tr>
</thead>
<tbody>
<tr>
<td>2</td>
<td>2 * 90 = $180.00</td>
<td>100 + 90 = $190.00</td>
</tr>
<tr>
<td>5</td>
<td>5 * 90 = $450.00</td>
<td>100 + 4*90 = $460.00</td>
</tr>
<tr>
<td>9</td>
<td>9 * 90 = $810.00</td>
<td>100 + 8*90 = $820.00</td>
</tr>
<tr>
<td>10</td>
<td>10 * 85 = $850.00</td>
<td>100 + 8*90 + 85 = $905.00</td>
</tr>
<tr>
<td>15</td>
<td>15 * 85 = $1,275.00</td>
<td>100 + 8<em>90 + 6</em>85 = $1,330.00</td>
</tr>
<tr>
<td>19</td>
<td>19 * 85 = $1,615.00</td>
<td>100 + 8<em>90 + 10</em>85 = $1,670.00</td>
</tr>
</tbody>
</table>
Definitions

Publications

To select a pricing method, simply click on the field for that method. (Refer to the built-in help system for information on the effect of unit pricing and stepped pricing on renewal notices.)

Tax rate table  If this publication is taxed in at least one jurisdiction, enter in this field the correct tax rate table. If the publication is not taxed, leave this field blank.

You cannot type directly in this field. Instead, right click and then select “Pick tax table” to choose from a list of tax rate tables you’ve already defined; select “new tax table” to create a new tax rate table; select “Change tax table” to change the definition of the tax rate table now in this field (be very careful when using the “Change tax table” option as the definition of the tax table will be changed in every place that it is used); or select “Clear” to remove the tax rate table that is currently in this field.

Warning: taxable field

Don’t confuse the ‘Taxable’ field on the customer address screen (where you enter orders) with the question of whether or not a publication is taxable. QuickFill assumes all customers are taxable. If they’re not, you enter “N” in the ‘Taxable’ field of the order-entry form. If the publication is not taxed (that is, you leave this field blank), QuickFill won’t tax taxable customers for this publication. But it might tax them for some other publication (refer to “Customer, address” in the built-in help system’s index for details on the customer address screen and the ‘Taxable’ field).

Charge tax on shipping  In most areas, sales tax is based on the price of the subscription alone provided that the shipping charge is stated as a separate charge. However, in some areas (such as Canada), sales tax is computed on the sum of the subscription price plus the shipping charge. If you need to include the shipping charge in the sales tax computation, click once in this field so that a check mark appears in it, otherwise, leave this field blank.

‘Billing’ tab

This tab contains billing information and policies for your publication.

Billing series You use a billing series to let QuickFill know how you want to bill customers. For example, the billing series tells QuickFill how long an interval to wait between bills.

QuickFill uses the billing series you select here as the default for new orders for this publication. You can override this series for an individual order at the time a new order is entered or by using ‘Adjustments’ under ‘Transactions’ on the main menu. You can also assign alternative billing series to new orders you receive from special promotions. Just specify a different billing series when you define the tracking code for that promotion.
The default billing series for follow-on (renewal) orders is defined in the renewal series for the original order; it is specified in the ‘Next billing series’ field. (Refer to the built-in help system for more details on the ‘Next billing series’ field and defining a renewal series).

You cannot type directly in this field. Instead, right click and then select “Pick billing series” to choose from a list of billing series you’ve already defined; select “New billing series” to create a new billing series; select “Change billing series” to change the definition of the billing series now in this field (be very careful when using the “Change billing series” option as the definition for the billing series will be changed in every place that it is used); or select “Clear” to remove the billing series that is currently in this field.

Say you enter a payment with the ‘New order’, ‘Renewal’, ‘Payment’, or ‘Transfer payment’ transaction and the payment leaves an order with a balance due that is less than the minimum bill amount you enter in this field. (You enter $5.00 in this field, for example, and get a payment that leaves the order with a balance due of $4.00.) QuickFill now automatically writes off this amount. If the amount due is equal to or greater than the minimum bill amount, QuickFill gives you a choice: You can either write off the balance due or bill the customer for that amount.

You can change this amount at any time. The change takes effect immediately.

If a subscription remains unpaid after the last bill in the billing series has been sent, QuickFill automatically cancels the subscription. Sometimes, especially with high-priced publications, the amount being billed may be small when compared with the total price. For example, the subscriber paid $400.00, which is the price of the subscription, but failed to pay the sales tax of $24.00. This amount exceeds the minimum amount that will be billed, so QuickFill sends bills for the $24.00. If the subscription is canceled at the end of the billing series, then no renewal notices are sent, and you will lose the subscriber and the possibility of a $400 renewal. In this situation you may want to write off the amount due instead of canceling the subscription. You can accomplish that by setting the minimum cancellation amount to $30.00.

By setting this field to have a bigger dollar amount than the previous field, you can define a range of amounts that are big enough to be worth billing for but small enough that you are still willing to attempt to renew.

The value you enter in this field controls how you handle orders that were suspended or canceled for nonpayment and subsequently reinstated. Enter the maximum number of issues that you want to backfill in these cases. If you don’t want to backfill any issues, enter 0.

You can change this number at any time. However, the change affects only those customers you reinstate after making the change.
Definitions

Publications

Note: timing of first bill

The next three fields determine your publication’s default policy for sending first bills for unpaid new orders. These fields are mutually exclusive and are only used if these fields have not been filled out in the definition of the offer to which a subscriber responds. When you make an entry in one, data in the other is blanked out.

Send first bill with issue

Select this field if you want to send the first bill for an unpaid new order (not a renewal order) with the initial (that is, first ever) issue.

If you choose to send the first bill with the first issue, QuickFill produces the bill when you run the ‘Issue labels’ update, not when you run the ‘Billing’ update. QuickFill also automatically sorts the issue labels for those orders receiving these first bills into a separate group (refer to the built-in help system for details on the ‘Issue labels’ update). You can use the address on the bill with a window envelope.

Send first bill immediately

Select this field if you want to send the first bill the next time you run the ‘Billing’ update, even if you haven’t sent any issues.

Send first bill ___ days after first issue

Select this field and enter the number of days after the first issue that you would like to send the first bill.

When you enter a number other than 0 in this field, QuickFill gives you a built-in delay before you mail the first bill. Usually, you select this option if you want to ensure that the customer receives the first issue of a new order before he or she gets the bill. If you don’t want this delay, enter 0. Even if you specify no delay by entering a 0, QuickFill will not produce bills for new orders until you run the ‘Issue labels’ update that produces the first label (and presumably you’ve served the first issue). You can change this field at any time. Only orders you enter after the change are affected.

You can override the billing policy you’ve just set for special promotions. Just override this policy when you define the offer for your promotion. When you define the offer, you’ll see a third billing option—‘Earliest date’. You can use this option for both new and renewal orders (refer to the built-in help system for more on defining an offer).

Delay the billing of renewal orders...

Check this field, and QuickFill will not bill renewal orders until their first issue has been served. If you leave this field blank, QuickFill will bill renewal orders immediately.

Bill the unpaid balance after an order is canceled

Check this field, and QuickFill will issue one “cancel bill” to canceled subscribers who have not paid for issues they’ve received. QuickFill generates this bill both for subscriptions it canceled automatically for nonpayment and for subscriptions you canceled with the ‘Cancel’ transaction. The cancel bill is for an amount equal to the value of the issues you served—less, of course, any
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partial payments, credits, and so forth. QuickFill will generate a cancel bill only for amounts that are more than the minimum billing amount you entered in the previous field.

You select the billing package and the messages you want for the cancel bill further down on the publication definition ‘Billing’ tab (see below).

Leave this field blank, and QuickFill will write off the unpaid balance automatically whenever a subscription is canceled.

You can change your entry in this field at any time. The change affects only those cancelations that take place after you have made the change. You may override this publication policy during the ‘Cancel’ transaction. If the subscription you are canceling has an unpaid balance, QuickFill will warn you that the publication policy is to send a bill; you then have a choice of whether or not to send the bill.

Your entries in these fields control the billing package and messages QuickFill uses for cancel bills. (Refer to the built-in help system for complete details on billing packages and messages)

You cannot type directly in these fields. Instead, right click and then select “Pick billing package” or “Pick message” to choose from a list of billing packages or messages you’ve already defined; select “New billing package” or “New billing message” to create a new billing package or message; select “Change billing package” or “Change billing message” to change the definition of the billing package or message now in the field (be very careful when using the “Change” option as the definition for the billing package or message will be changed in every place that it is used); or select “Clear” to remove the billing package or message that is currently in the field.

If you chose not to bill canceled subscriptions, leave these fields blank.

When a cancel bill is issued the amount due is reduced to a prorated amount based on the number of issues the subscriber received. This reduced amount due is normally written off the next time you run the billing update. If the customer then sends payment, QuickFill automatically reverses this write-off when you enter the payment. If you wish to delay this write-off, so that the reduced amount due continues to appear on the ‘Accounts Receivable’ report, enter the number of days that must elapse before it is written off.

You can either carry overpayments as credit balances or “automatically” refund them. (If you choose to carry the overpayments as credit balances, QuickFill applies the payments to renewals, or you can refund them individually with the ‘Refund’ transaction.)

Check this field, and QuickFill automatically refunds any overpayments you receive via the ‘Payment’, ‘New order’, ‘Renewal’, or ‘Transfer payment’ transactions.
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transactions. These refunds, as well as any refunds you set up manually with the ‘Refund’ or ‘Cancel’ transaction, are reported when you run the ‘Refund’ update. You can then send a check for these refunds (refer to the built-in help system for details on the ‘Refunds’ update).

If you don’t want to issue “automatic” refunds, leave this field blank. You can then use the ‘Credit balance’ report to review outstanding credit balances.

You can change your entry in this field at any time. The change affects only those transactions you have entered after making the change.

Even if you chose to automatically refund overpayments in the field above, QuickFill treats any overpayments less than the amount you enter here as a credit balance and applies it to the next renewal. If a customer has a credit balance, QuickFill shows that amount as a credit when it generates a renewal notice. If you don’t want to carry forward small amounts, you can use the ‘Credit balance’ report to identify these cases and write them off by using the ‘Adjustments’ transaction.

You can change this amount at any time. The change affects only transactions you have entered after making the change.

‘Renewal’ tab

This tab contains renewal information and policies for your publication.

Renewal series

You use a renewal series to let QuickFill know how you want to renew subscriptions. For example, the renewal series tells QuickFill when to start generating renewal notices for an order and how long to wait between notices.

QuickFill uses the renewal series you select here as the default for all new orders for this publication. You can, however, override this series for an individual order at the time a new order is entered or by using ‘Adjustments’ under ‘Transactions’ on the main menu. You can also assign alternative renewal series for new orders you receive from special promotions. Just specify a different renewal series when you define the tracking code for that promotion.

When you define the renewal series for the original order, there are ‘Next renewal series’ fields in which you must specify the default renewal series to be used for follow-on (renewal) orders. Refer to the built-in help system for more details on the ‘Next renewal series’ field and defining a renewal series.

You cannot type directly in these fields. Instead, right click and then select “Pick renewal series” to choose from a list of renewal series you’ve already defined; select “New renewal series” to create a new renewal series; select “Change renewal series” to change the definition of the renewal series now in this field (be very careful when using the “Change renewal series” option as the

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Definitions

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definition for the renewal series will be changed in every place that it is used); or select “Clear” to remove the renewal series that is currently in this field.

Warning: ‘Renewal series’ field

When defining a new publication via the “New” button, a renewal series will automatically be defined for the publication. The ‘Renewal series’ field may not be changed in any way until after the new publication has been defined.

Renew unpaid orders

Check this field, and QuickFill will generate renewal notices for orders with unpaid balances whenever you produce renewal notices. In most cases, QuickFill will have canceled unpaid full-term orders before the renewal series begins. For this reason, this field will probably affect only unpaid short-term (trial) orders.

Even if you select this field, QuickFill warns you whenever you enter a renewal for an order that is still unpaid. You then have a choice of accepting or rejecting the renewal.

Grace issues are issues you send after an order has expired with the hope that the customer will renew. If you enter a number other than 0 in this field, QuickFill changes the subscription status to “Graced” instead of “Expired” once the regular term of the subscription expires. After you’ve served the number of grace issues you specify, QuickFill changes the subscription status to “Expired.”

Note: audited publications and grace issues

For BPA and VAC audited publications QuickFill does not serve grace issues to controlled subscriptions or PB (Paid Bulk) subscriptions. For ABC audited publications it does not serve grace issues to controlled subscriptions, PB (Paid Bulk) subscriptions or PS (Paid Sponsored) subscriptions.

In addition to setting your gracing policy here, you can also control gracing on the ‘Links’ tab of the “Renewal series” definition screen. On that tab you will find a checkbox that tells QuickFill not to send grace issues to any subscriptions that are linked to that renewal series. You can use that feature to provide finer control over gracing than the publication-wide gracing policy.

Note: subscriptions that reach the end of a renewal series before expiring

If the last effort of the renewal series is sent before the subscription expires, it will be marked so that it expires with the last issue. No grace issues will be sent.

If the last effort of the renewal series is sent while the subscription is being graced, it will be marked so that it expires and no additional grace issue will be sent.

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You can change this number at any time. The change affects all subscriptions you’re gracing. (Say you decrease the number of issues you want to grace. QuickFill then expires those graced subscribers who have already received a number of grace issues greater than or equal to the new maximum when you next run the ‘Issue labels’ update.)

Although your policy may be to send one or two grace issues after a subscription expires, you probably do not want the policy to apply to short-term trial subscriptions. Use this field to establish the shortest subscription that should receive grace issues.

If you send grace issues, then receive a renewal, QuickFill automatically will count the grace issues as part of the renewal order if the number of issues missed since the prior order ended is less than the number you enter here. If more than this number of issues has been missed the graced issues will be “forgiven” and will not be deducted from the renewal order. If you always want to deduct the graced issues from the renewal, enter a value of 999. If you never want to deduct the graced issues from the renewal enter a value of 0.

The entry in this field controls the handling of late renewals. Do you send these customers issues they’ve missed? If you do, enter the maximum number of issues you want to go back. QuickFill then produces the required back-issue labels automatically the first time you run the ‘Issue labels’ update after you enter the renewal.

You can change this number at any time. However, the change affects only those renewals you enter after making the change. You may override this publication policy when entering a renewal by using the ‘Next issue’ field to specify the issue at which the renewal order should start. You may decide that you want the order to receive more back issues or fewer back issues than normal; or perhaps, no back issue at all.

‘Shipping’ tab

This tab contains information regarding shipping charges as well as default shipping codes for your publication.

When you enter a new subscriber QuickFill determines which of the six possible regions the subscriber is located in by looking up the subscriber’s country code in the foreign country table. If you have entered a shipping code in the field for that region on this screen, QuickFill will use that code as the default shipping code for the new subscription. If you have left the shipping code field blank on this screen then QuickFill uses the shipping code in the foreign country table.

Looking at it another way, the foreign country table specifies the default shipping code to be used for subscribers located in each country. The
publication definition screen provides a way of overriding those values and specifying a shipping code to be used for all countries in the region.

Example: Most of your publications are sent airmail to Europe and the Americas, and by surface mail to other countries, so you set the default shipping codes in the foreign country table accordingly. However, you have one publication that must be sent by airmail to all foreign countries. Enter an ‘A’ in all regions except the USA and QuickFill will automatically use that code for foreign subscriptions to this one publication.

Note: shipping codes for renewal orders

Shipping codes for renewal orders always default to the shipping code of the previous order. However, you may override this code by entering a different code in the ‘Shipping class’ field when you enter the renewal.

Shipping codes and descriptions

Any of the 26 letters of the alphabet can be used as a shipping code. Typically you will use ‘F’ for first class mail, ‘A’ for airmail, but you can edit the descriptions of each of the shipping codes on this screen. Be aware that changes that you make to shipping code descriptions will affect all of your other publications too. Shipping code descriptions apply system-wide and are not unique for each publication.

Cost per issue column

Your entries in the ‘Cost per issue’ column control the amounts that QuickFill charges subscribers for shipping. These values are the per-issue per-copy cost of postage and handling. You specify these amounts in dollars and cents to five decimal places. (That way, when QuickFill multiplies the price by the number of issues and copies per year, the result comes out as a round number.) If you don’t charge separately for shipping and/or handling, leave 0’s in the ‘Cost per issue’ column.

Allowed column

The checkboxes in the ‘Allowed’ column control whether or not a particular shipping code is allowed for this particular publication. Example: Most of your publications are delivered by postal mail using shipping classes F (first class mail) and P (periodical class), but a few are delivered by email only and use shipping class E (email). By setting the ‘Allowed’ checkboxes for codes F and P on the postal publications and for code E on the email publication you can avoid data entry mistakes when entering orders for new subscribers.

Presort column

The checkboxes in the ‘Presort’ column control whether or not the ‘Issue labels’ update should create output files suitable for postal presort for these shipping classes. If you leave these boxes unchecked the ‘Issue labels’ update will generate QuickFill standard label files, which can be printed directly without further processing.
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Note: Post-processing of issue label groups

If you would like to view or print your labels from QuickFill prior to creating postal presort label files, leave the ‘Presort’ box unchecked. When you run the ‘Issue labels’ update, QuickFill will create standard QuickFill labels. After viewing and/or printing these labels, you can click the “Label groups” button on the ‘Labels’ tab of the ‘Print saved reports’ screen to split the label file up into its component groups and/or create a postal presort file (with the dBase label format). Refer to appendix E, Postal presort & QuickFill Label Splitter, for details on the label splitter.

Minimum group size for presort

The ‘Issue labels’ update sorts the issue labels into groups based on their characteristics. Issues that should be packaged with a renewal notice go in one group, subscribers that require multiple copies go in another group and so on. Some of these groups can be quite small and there isn’t any benefit to performing a postal presort on them. In this field you specify the smallest label group size that you consider to be worth doing a postal presort on. Label groups that are smaller than this value will be output as standard printable labels so that you can print them and deal with separately from the main body of the issue labels.

‘Issue labels’ tab

This tab contains information related to the labels that are produced when the ‘Issue labels’ update is run.

Include on label

QuickFill reserves the first line of all issue labels for the expiration date, order number, or other useful identifying information. Here you can select up to five items to appear on the first line. QuickFill will put the items you select from left to right in the order you specify. The last item is printed flush right. If you assign customer number a “1,” it will appear first. If you assign expiration issue a “2,” it will be printed just to the right of the customer number and so on.

QuickFill will put as many fields as can fit on a 40-character label (or 30-character label if the ‘Limit address label width to 30 characters’ field on the ‘General’ tab of the ‘Preferences’ definition screen is checked). There will always be at least one space between fields. This means that QuickFill may truncate or omit some of the lower-priority fields. The maximum size of each field when printed is:

- Order number: 8
- Customer number: 8
- Expiration issue: 20
- Publication code: 6
- Purchase order number: 20
- Quantity: 4
- Demographic data 1: 19
This means that if you limit your expiration issue descriptions to 12 characters, you will always be able to fit it as well as the order number (8 characters), the customer number (8 characters), and the two spaces needed to separate them.

If you select only one item and give it a priority of "1," QuickFill will print it flush left. If you assign it a priority other than "1," QuickFill will print it flush right. If you select more than one field and they all fit on the line, then QuickFill will put the last field flush right.

You can change the entry in these fields at any time.

`Note: expiration issue on top line of label`

If you choose to include the expiration issue on the top line of your labels, QuickFill will print "XXXX" for complimentary subscriptions. In addition, since controlled subscriptions may be canceled at the whim of the publisher, QuickFill will not print an expiration issue for these subscriptions.

`Note: top line of label`

Even if you don’t put a number next to any of the options described above, QuickFill won’t use the top line of the label for address information. Also, these options apply only to labels produced when you run the ‘Issue labels’ update. They don’t apply to promotional labels (refer to the built-in help system for details on promotional labels).

If you choose to have the premium code printed on the top line of the labels and you do not send premiums with the issue, it will only be printed on the premium labels and not the associated issue labels. The premium code will only be printed on the issue labels if you have defined your offers to send premiums with the issue.

`Multicopy orders`

Use this field to control how many labels QuickFill produces for multicopy orders. If you leave it set to a value of one QuickFill will always produce one label for each order, regardless of the number of copies to be shipped. QuickFill sorts the labels into separate groups according to the number of copies you need for each subscription. The first and largest group of labels will be for orders for a single copy. The second group will be for orders with two copies and the third group for orders with three copies, and so on.
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Alternatively you may wish to produce a separate label for each copy of a multicopy order. That is, if a customer with one subscription has requested five copies of the publication, QuickFill produces five labels. This simplifies mailing procedures but adds to your postage costs. It can be expensive and even impractical to print separate labels for bulk orders for tens or hundreds of copies. You use this field to set the dividing line between separate labels and a single label. If the order is for more copies than the value you specify then QuickFill will produce a single label. If the order is for a number of copies that is less than or equal to the value you enter here then QuickFill will produce a separate label for each copy.

You can change the entry in this field at any time.

Ship premiums using… Check this box and the labels for premiums will have the same shipping class as was specified when the order was entered.

Normally premiums that are shipped separately from the issues are shipped by the most cost effective method, which is usually not the same as the shipping method used for the issues themselves. For this reason, the premium labels generated by the issue label update do not specify a shipping class. In some cases you may have high value orders where the customer specified and paid for expedited shipping and you want the premiums to be sent using the same shipping class as the issues.

Label group split table If you need to sort your issues into groups (i.e., new orders, gifts, renewal wrappers, etc.) that differ from the standard QuickFill groups of publication, issue, service code, shipping class, and quantity, enter the name of the label split table you would like to use for this publication in this field.

You cannot type directly in this field. Instead, right click and then select “Pick split table” to choose from a list of label split tables you’ve already defined; select “New split table” to create a new label split table; select “Change split table” to change the definition of the label split table now in this field (be very careful when using the “Change split table” option as the definition of the label split table will be changed in every place that it is used); or select “Clear” to remove the label split table that is currently in this field.

If the standard QuickFill label grouping is satisfactory, leave this field blank. Refer to the built-in help system for details on defining label split tables.

Periodical class zone table If your publication is mailed at periodical class postage rates, enter the periodical class zone table you would like to use in this field.

You cannot type directly in this field. Instead, right click and then select “Pick zone table” to choose from a list of periodical class zone tables you’ve already defined; select “New zone table” to create a new periodical class zone table; select “Change zone table” to change the definition of the periodical class zone table now in this field (be very careful when using the “Change zone table”
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option as the definition of the zone table will be changed in every place that it is used); or select “Clear” to remove the periodical class zone table that is currently in this field.

If you do not mail your publication at periodical class postage rates, leave this field blank. Refer to the built-in help system for details on defining periodical class zone tables.

County and SCF table

If your publication is mailed at periodical class postage rates and you want to take advantage of discounted in-county and intra-SCF postal rates, enter the county table you would like to use in this field.

You cannot type directly in this field. Instead, right click and then select “Pick county table” to choose from a list of county tables you’ve already defined; select “New county table” to create a new county table; select “Change county table” to change the definition of the county table now in this field (be very careful when using the “Change county table” option as the definition of the county table will be changed in every place that it is used); or select “Clear” to remove the county table that is currently in this field.

If you do not mail your publication at periodical class postage rates, leave this field blank. Refer to the built-in help system for details on defining county tables.

‘Audit’ tab

This tab indicates whether or not a publication is audited and if so by whom. It also contains the qualification form. (The ‘Audit’ tab as well as information about it may only be accessed from the audit system.)

Overview of the qualification form

You use the fields on your publication definition audit tab to define the content of the questionnaire that you send to your subscribers and prospects to qualify them for your publication.

Typically a qualification questionnaire includes questions that ask for the subscriber’s title or function and business or industry. Answers to these questions are reported in paragraph 3a of the publisher’s statement.

While the format of questions about title and function or business and industry are fairly standard, you can customize your own questionnaire and capture the responses in QuickFill as long as either the questions require a multiple-choice response (e.g., “What is your title? (A) CEO, (B) Finance Officer…”); or the answer can be expressed as a numeric value (e.g., “How many employees are at your location?”).

The data that you capture from your qualification questionnaire forms the basis for “controlling” your circulation. If your pool of prospective subscribers exceeds your budget for free circulation, you can tailor the pool by using the
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‘Cancel subscriptions’ and ‘Make subscriptions’ updates (selected from the ‘Controlled subs’ update submenu) to cancel the subscriptions of people who do not meet some minimum criteria and to create new subscriptions for prospects who better meet the profile of your “ideal subscriber.”

The following is part of a sample qualification questionnaire for the hypothetical publication Electronic Widgets.

| 1. Do you wish to receive Electronic Widgets free of charge? |
|---------------|-----------------|
| ___ Yes       | ___ No          |

Signed __________________________________________
Date ________________________________

2. Are you currently involved in designing or developing electronic widgets, equipment or systems?
___ Yes ___ No

3. Please check the categories that best describe your job function(s):
   ___ A Research & Development
   ___ B Design
   ___ C Application
   ___ D Production
   ___ E Measurement
   ___ F Other science or engineering functions (specify: ____________________________)

4. Please indicate the primary end product or service of your company at this location (Check only one 01–11):
   ___ 01 Analytical, test, or measurement instrumentation
   ___ 02 Aerospace & navigation systems (nonmilitary)
   ___ 03 Military electronics (government)
   ___ 04 Military equipment (contractor)
   ___ 05 Communications systems or equipment
   ___ 06 Data processing & storage equipment
   ___ 07 Data & information display & output equipment
   ___ 08 Software
   ___ 09 Medical electronics
   ___ 10 Consumer electronics
   ___ 11 Industrial electronics

5. Do you select, specify, authorize, or influence the purchase of the products listed below (Check all that apply A–I)?
   ___ A Communications
   ___ B Controllers & interfaces
   ___ C Detectors, sensors, & scanners
   ___ D Displays
   ___ E Fiber optics
   ___ F Imaging components
   ___ G Lasers & other radiation sources
   ___ H Memories
   ___ I Optical devices

   BUSINESS & INDUSTRY (Please be specific)

   6A. What is the primary end product manufactured at this location?
   __________________________________________________________

   6B. How many employees are at this location?
   ______

   6C. What is the total number of employees in the corporation?
   ______
Here is how you would enter the qualification form on the publication definition audit tab:

When you enter a subscription or prospect record for this publication, the qualification data tab will look like this:

<table>
<thead>
<tr>
<th>Qualification data</th>
<th>Personal identification data</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 Job function</td>
<td></td>
</tr>
<tr>
<td>4 Primary end product</td>
<td></td>
</tr>
<tr>
<td>5 Select, specify</td>
<td></td>
</tr>
<tr>
<td>6A Product or service</td>
<td></td>
</tr>
<tr>
<td>6B Employees, this loc</td>
<td></td>
</tr>
<tr>
<td>6C Employees, total</td>
<td></td>
</tr>
</tbody>
</table>
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In the example on the previous page, yes and no questions such as “Do you wish to receive Electronic Widgets free of charge?” and “Are you currently involved in designing or developing electronic imaging components, equipment, or systems?” are not recorded since presumably all people that qualify must answer “Yes.” However, if you must capture the responses to such questions, you could define them on the ‘Audit’ tab like this:

<table>
<thead>
<tr>
<th>Question</th>
<th>Description</th>
<th>Read Values</th>
<th>Codes</th>
<th>Code Descriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>_____</td>
<td>Wishes to receive</td>
<td>_____</td>
<td>_____</td>
<td>_____</td>
</tr>
</tbody>
</table>

We have changed non-multiple-choice questions that cannot be expressed as a numeric value, such as “primary end product,” into multiple choices. We have listed the most common responses plus a code for “other.” If you find that the number of responses in the “other” category is too large, you can change the form definition to include additional categories. The disadvantage of free-form questions like these is that they require the person entering the data to analyze the response and encode it instead of transcribing a preprinted code value.

Questions that require a numeric response are flagged with a ‘#’ in the ‘Codes’ column. QuickFill will then accept any numeric value from 1 to 999,999,999. The ranges that are entered in the right-hand column will be used for reporting purposes in paragraph 3a of the publisher’s statement. If you find that the range boundaries are unsuitable, or that you would like to see additional ranges on the report, you can change the ranges on the form definition at any time and rerun the audit report.

Defining a qualification form

Here’s how to fill in each of the fields when defining a qualification form.

**Audited by**

Select ‘Not audited’, ‘ABC Business’, ‘ABC Magazine’, ‘BPA Business’, ‘BPA Consumer’, or ‘VAC’ by clicking once in the appropriate field to indicate the organization and audit type, if any, for the publication. Selecting any of the ‘ABC’, ‘BPA’, or ‘VAC’ radio buttons allows you to enter data from qualification questionnaires and produce audit reports, such as the ‘Publisher’s statement’ or the ‘Qualified circulation’ report. (Note: At this time, there is no difference between the ‘BPA Business’ and ‘BPA Consumer’ buttons. Separate reports will be available in a future release.)

**Warning: changing a nonaudit publication to an audited publication**

When converting a nonaudited publication to an audited publication, do not change this field from ‘None’ to one of the audited choices without first reading the “How to change a nonaudited publication to audit” section of the built-in help system. All orders to an audited
publication must have one of the 12 subscription classifications and one of the request types listed in chapter 4, *Audit system basics*, pp. 4.5-4.7. If some or all of your subscriptions have not been classified, then this must be done before you change this field.

<table>
<thead>
<tr>
<th>Qualification form dated</th>
<th>Enter the date of the qualification form you are using to enter information into QuickFill.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualification data required for paid subscriptions</td>
<td>Check this field if your publication requires qualification data in order for subscriptions to be classified as “qualified.” (The qualification date will be the same as the date of the qualification data.) Leave this field blank if qualification data is not required in order for subscriptions to be classified as “qualified.” (The qualification date will be computed as the date of the qualification data or the date of the most recent paid order depending on which date is most recent.)</td>
</tr>
<tr>
<td>Questn</td>
<td>Enter the number of the question as it appears on your questionnaire form. The question number will appear on the data entry screens as a reminder.</td>
</tr>
<tr>
<td>Web type</td>
<td>This column is only present for users of the QuickFill Internet Extensions (QFIE). It controls the appearance of the question on the QFIE version of the qualification questionnaire. A web type of “Radio” results in a radio button being displayed next to each response, “Checkbox” results in a check box being displayed next to each response (use this web type for questions that allow multiple responses), “Select” results in a drop-down selection list that contains all responses for a question, “Numeric” results in a field being displayed for entry of a numeric response, and “Suppress” results in the question not appearing on the QFIE version of the qualification questionnaire.</td>
</tr>
<tr>
<td>Question description</td>
<td>Enter a description of the question. The description will appear next to the question number on the data entry screens as a reminder.</td>
</tr>
<tr>
<td>Question description for web</td>
<td>This column is only present for users of the QuickFill Internet Extensions (QFIE). The description entered here will appear next to the question number on the qualification questionnaire displayed on the web.</td>
</tr>
<tr>
<td>Reqd</td>
<td>Check this box to mark the question as being required. QuickFill enforces these rules regarding required questions:</td>
</tr>
<tr>
<td></td>
<td>• If the subscriber answered any questions, then those questions marked as required must be answered.</td>
</tr>
<tr>
<td></td>
<td>• If the qualification form has no required questions then qualification data does not ever need to be entered.</td>
</tr>
<tr>
<td></td>
<td>• If the qualification form has at least one required question then qualification data must be provided and the required questions must be answered, except: 1) non-qualified and verified subscriptions do not need</td>
</tr>
</tbody>
</table>
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qualification data; 2) paid subscriptions do not need qualification data if the ‘Qualification data required for paid subscriptions’ box is not checked.

Values

The ‘Values’ column controls the number of answers a subscriber may supply to a particular question. When you enter qualification data, QuickFill will not accept more answers to a particular question than the number you have specified in this field. This allows you, for example, to specify that the subscriber should “check one only,” “check the top three,” or “check all that apply.” To specify “check one only,” enter “1”; to specify the top three, enter “3”; to specify all that apply, specify the total number of codes you defined for the question.

Codes

Enter the code you wish to use for data entry for this response. List the codes exactly as they appear on the questionnaire so that you won’t have to translate the information. The code descriptions (see below) will appear as row or column headings for paragraph 3a of the ‘Publisher’s statement’ and the ‘Qualified circulation’ report.

Note: questions with numeric responses

For questions that require a numeric response, enter a ‘#’ in the ‘Code’ fields for the question and the appropriate number ranges in the ‘Code Descriptions’ fields. (See questions 6B and 6C on page 8.53.)

Other box

This column is only present for users of the QuickFill Internet Extensions (QFIE). Enter “Y” if you would like the QFIE version of your qualification questionnaire to contain a field labeled “Other.” Customers will be able to use this field to enter a response other than the ones you’ve listed for a question.

Code description

Use this field to enter the meaning of each code. Remember, the code descriptions will appear as row or column headings for paragraph 3a of the ‘Publisher’s statement’ and the ‘Qualified circulation’ report.

Code description for web

This column is only present for users of the QuickFill Internet Extensions (QFIE). The description entered here will appear as a response for the corresponding question on the qualification questionnaire displayed on the web. (Entries in this field are not listed for questions with a “Numeric” web type. Instead, a field in which a numeric response may be entered is displayed.)

Copying rows in a qualification form

You can cut or copy rows from a qualification form and then paste them into a different spot on the same qualification form, to another form (in the same database or in a different database), or to another application. To select and cut or copy rows, left click in the column to the left of the question number for the first row you want to select, hold down the mouse button, drag the mouse to select additional rows, and then use the “cut” or “copy” command (you can
either use the toolbar buttons or combination keys, CTRL-X and CTRL-C). The rows that were selected will be stored on your computer’s clipboard in a tab-delimited format. You can then go to the qualification form or application to which you want to add the rows and use the “paste” command (again, you can either use the toolbar button or combination keys, CTRL-V). The rows will be inserted above the cursor so be sure to move the cursor to the desired spot before using the “paste” command.

Changing your qualification form

Provided you have the blessing of the audit bureau, you can change your qualification form at any time as long as you take a few commonsense precautions.

- You can drop codes or questions at any time.

  Example: Let’s say you’re using a qualification form that looks like the sample for Electronic Widgets (see the sample qualification form above). You want to drop code B (“Gizmos”) from question 6A (“Product or service”). Position the cursor on the line containing the “Gizmos” code and click on “Delete row” to delete it. Some existing subscribers and prospects may continue to have code B listed in their response to question 6A, but that code will no longer show up on either the ‘Qualified circulation’ report or the ‘Publisher’s statement’ report.

- You can add codes to existing questions or add questions to your form at any time, with one restriction. You must not reuse codes that were previously assigned to a different response to the same question. To add a new question or a new code to an existing question, click on “Insert row” to insert a line in the form definition or “Append row” to add a line to the end of the form definition. New questions must be assigned new question numbers.

  Example: As we described in the above example, you deleted code B from question 6A. Now you want to add “Wingdings” to the list. You must assign a new code, F, that has never been used before. If you were to fill in the empty slot in the list by assigning it a code of B, every subscriber that previously reported that he or she produced gizmos would now appear to produce wingdings.

Warning: qualification form changes

Before changing your qualification form, be sure to back up your database and galley data file(s). You may need to restore these files for your audit.
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In addition, when considering changes to your qualification form, keep in mind that it is always best to wait until the beginning of an audit period to do so. Making changes may result in a mismatch between the fields in the most recent galley data file and the publication’s current qualification form. When this happens, an error message to this effect appears in the update report and QuickFill does not serve the issue until the galley data file has been re-generated. For more information concerning this issue contact Technical Support at CWC Software, Inc.
Address matching

The ‘Address matching’ screen is used to specify the duplicate detection method that will apply to all of your publications.

QuickFill uses a match code that consists of, in this order, the country code, the zip code (or postal code), the “soundex” of the customer’s last name, and the “soundex” of the customer’s company name. By looking at these fields and at the “soundex” codes, QuickFill determines whether or not a customer being entered is a duplicate of an existing customer. As explained below, this match code can be changed.

Note: soundex code
A soundex code is a code composed of the first letter of the name followed by three digits. Names that sound alike usually have soundex codes that are the same. The method used to construct the soundex code from the name is a standard algorithm developed by the Census Bureau.

You can control which parts of the match code are used in checking for duplicates. By default QuickFill uses the country code, zip/postal code, soundex of the last name, and soundex of the company name—two customer records will be considered possible duplicates if their match codes match. If you wish you can widen the scope of the duplicate detection “net” by ignoring the company or the company and the last name soundex code. You make this choice by selecting ‘Country code and postal code only’ (described below) as the minimum match requirement.

When searching for duplicates QuickFill first determines if the customer you are entering is a possible match of an existing customer based on the match code; this process is described above. If a possible match is found, a score of 100 points is assigned and the second part of the duplicate detection process is performed. In this part, QuickFill uses each of the components that you define on the ‘Address matching’ screen to compare the possible matches.

A score is assigned based on how well these address components match. Points are deducted from the maximum score of 100 for each component such as the first name, street number, or post office box that does not match. The
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Address matching

‘Address matching’ screen provides the ability for you to define the number of points to be deducted as well as the minimum score for a customer to be considered a near or an exact match. QuickFill’s address matching is not case sensitive. For example, “BOX” and “Box” are considered the same.

You can control the points that are deducted for each component by changing the value in the field next to each of the criteria listed on the ‘Address matching’ tabs.

**Warning: ‘Country code and postal code only’ option**

Do not select the ‘Country code and postal code only’ option if you have large numbers of customers concentrated in a small geographic area, say for a city or regional magazine. If you have hundreds of customers all in a single zip code, QuickFill will take a very long time to perform duplicate detection for customers in that zip code.

**Note: match code and lookup sequence**

If you have reversed the sequence of the last name and company name soundex codes by selecting the ‘Zip/Company/Name’ option on the ‘Lookup’ tab of the ‘Preferences’ screen, then your choices on this screen are also reversed. Your choices are ‘Country code and postal code only’, ‘Above plus soundex of company’ and ‘Above plus soundex of last name’. (See this chapter, p. 8.69, for details on using the ‘Lookup sequence’ field in the ‘Preferences’ definition to change the match code sequence.)

**Note: bad debt customers**

In order to catch customers who request a “bill-me” subscription using false aliases, special rules are used if a customer has ‘B’ (“bad debt”) in the ‘Type’ field. Bad debt records will be included as possible matches if the country code and postal code match, regardless of what “minimum match requirement” field you select. Furthermore, only the street address is used during scoring. No points are deducted for mismatched names, no matter how different the names are.

**Match values 1**

When you select ‘Address matching’ under ‘Definitions’ on the main menu, you’ll see the ‘Match values 1’ tab first. This tab contains the following fields:

- **Use these fields to control the size of the candidate pool (the number of possible matches).**

- **Selecting ‘Country code and postal code only’ gives the largest pool size. That is, if a customer’s country code and postal code match that of another customer, QuickFill will do a complete check of both customer records. The suspected duplicate customer will be assigned a score based on the components of their address.**

QuickFill
Definitions

Address matching

name and address that matched the other customer’s and the values assigned to each of those components. If the score is greater than or equal to the ‘Minimum score for a “near” match’, the customer records will be displayed as possible duplicates.

Selecting ‘Above plus soundex of last name’ gives a smaller candidate pool size. QuickFill will only perform a complete check of possible duplicates if their country codes, postal codes, and soundex of their last names match each other. Again, a complete check is done and a score is assigned. If the score is greater than or equal to the ‘Minimum score for a “near” match’, the customer records will be displayed as possible duplicates.

Selecting ‘Above plus soundex of company name’ gives the smallest pool size. If you have a very large database with large numbers of names in densely populated areas such as Manhattan, you should select ‘above plus soundex of company’. QuickFill will only perform a complete check of possible duplicates if their country codes, postal codes, and the soundex of their last names and company names match each other.

Candidates with scores equal to or greater than this value will be displayed so that you can decide whether they really are the same person. Use caution when changing this value. Set it too low and QuickFill will show you too many names. Set it too high and you will end up with multiple records in the database for the same person. For example, let’s look at the following customers:

<table>
<thead>
<tr>
<th>John Smith</th>
<th>J. Smith</th>
</tr>
</thead>
<tbody>
<tr>
<td>255 Ellis Avenue, Suite 3b</td>
<td>J. Smith Publishing</td>
</tr>
<tr>
<td>Boston, MA  02113-1480</td>
<td>255 Ellis Avenue</td>
</tr>
<tr>
<td></td>
<td>Boston, MA  02113</td>
</tr>
</tbody>
</table>

If the value for ‘Minimum score for a “near” match’ was set to 80, these customer records would not be considered duplicates. Based upon the default values defined on the ‘Address matching’ screen, the following is a description of how QuickFill would view these two customers.

<table>
<thead>
<tr>
<th>Components found to be true</th>
<th>Points deducted</th>
</tr>
</thead>
<tbody>
<tr>
<td>One has full name, other has matching initial</td>
<td>5 points</td>
</tr>
<tr>
<td>Only one has a Zip+4</td>
<td>5 points</td>
</tr>
<tr>
<td>Only one has an apartment/unit/suite number</td>
<td>5 points</td>
</tr>
<tr>
<td>Only one has a company name</td>
<td>10 points</td>
</tr>
</tbody>
</table>
Definitions

Address matching

Again, based on a ‘Minimum score for a “near” match’ of 80 and the other default values defined on the ‘Address matching’ screen, the customers above would not be considered duplicates because they received a total score of 75 points; the starting score of 100 minus the total points deducted (25).

<table>
<thead>
<tr>
<th>Minimum score for an “exact” match</th>
</tr>
</thead>
<tbody>
<tr>
<td>This value is only used with subscription and prospect import programs. (Refer to the “How to” section of the built-in help system for more details on importing prospects and importing subscriptions.) Incoming customers that match existing customers with a score equal to or greater than this value will automatically be merged. Use extreme caution when changing this value. Set it too low and you risk combining the customer records of separate persons. Remember, points are deducted for components of the customer records that do not match. The higher that a customer’s score is, the more likely it is that he or she is a duplicate.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Last name soundex codes do not match</th>
</tr>
</thead>
<tbody>
<tr>
<td>This value is deducted from the score if the last names do not sound alike. This value is used only if you checked the ‘Country code and postal code only’ radio button for the “minimum match requirement.” In the other two cases the last name must sound alike for the record to be placed in the match candidate pool.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Soundex codes match, actual last names do not</th>
</tr>
</thead>
<tbody>
<tr>
<td>This value is deducted from the score if the names sound alike but are spelled differently (e.g., “Bean” and “Bain”).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Initial letters of first names do not match</th>
</tr>
</thead>
<tbody>
<tr>
<td>This value is deducted from the score if the first name has an initial letter that doesn’t match that of the customer being entered. (e.g., “Ben” and “Jerry”). Don’t assign too high a value to this test since some mismatches are misleading (e.g., “Bob” and “Robert”).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>One has full name, other has matching initial</th>
</tr>
</thead>
<tbody>
<tr>
<td>This value is deducted from the score if one record has a first name and the other has only an initial, and the initial matches the name (e.g., “J” and “John”).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Initials match, first name soundex does not</th>
</tr>
</thead>
<tbody>
<tr>
<td>This value is deducted from the score if the first names have matching initials but they do not sound alike (e.g., “Andrew” and “Adam”).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Soundex codes match, actual first names do not</th>
</tr>
</thead>
<tbody>
<tr>
<td>This value is deducted from the score if the first names sound alike but they are spelled differently (e.g., “Sydney” and “Sidney”).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Both names have prefix, but they do not match</th>
</tr>
</thead>
<tbody>
<tr>
<td>This value is deducted from the score if both names have a prefix such as “Mr.” or “Mrs.” but they do not match. It is important not to set this value to zero. If you do, QuickFill will think that “Mr. John Smith” and “Mrs. John Smith” are an exact match.</td>
</tr>
</tbody>
</table>
### Definitions

#### Address matching

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Both names have suffix, but they do not match</td>
<td>This value is deducted from the score if both names have a suffix such as “Jr.” or “II” but they do not match. It is important not to set this value to zero. If you do, QuickFill will think that “John Jones Sr.” and “John Jones Jr.” are an exact match.</td>
</tr>
<tr>
<td>Both addresses have sex code, but they do not match</td>
<td>This value is deducted from the score if the sex codes in the two customer records differ. Nothing is deducted if either or both of the sex codes are blank.</td>
</tr>
<tr>
<td>Titles do not match</td>
<td>This value is deducted from the score if the title fields do not match, but only if neither record contains a last name. The purpose of this is to avoid assigning 100 percent match scores to records that contain identical company names and addresses but that are directed to different positions (e.g., “Sales Manager, World Wide Widgets” and “Comptroller, World Wide Widgets”).</td>
</tr>
<tr>
<td>Departments do not match</td>
<td>This value is deducted from the score if the department fields do not match, but only if neither record contains a last name. The purpose of this is to avoid assigning 100 percent match scores to records that contain identical company names and addresses but that are directed to different departments (e.g., “Marketing Department, World Wide Widgets” and “Accounting Department, World Wide Widgets”).</td>
</tr>
<tr>
<td>Only one address has a Zip+4</td>
<td>This value is deducted from the score if one record has only a five-digit zip code and the other has a nine-digit zip code. Remember that at least the first five digits of the zip code must match for the records to even be considered. This value does not apply for addresses outside the U.S.A.</td>
</tr>
<tr>
<td>Both have Zip+4, but they do not match</td>
<td>This value is deducted from the score if both records have nine digit zip codes but the last four digits do not match. Remember that at least the first five digits of the zip code must match for the records to even be considered. This value does not apply for addresses outside the U.S.A.</td>
</tr>
<tr>
<td>Only one address has a PO Box</td>
<td>This value is deducted from the score if one record has a post office box and the other does not.</td>
</tr>
<tr>
<td>Both have PO Boxes, but they do not match</td>
<td>This value is deducted from the score if both records have post office box numbers but they do not match. QuickFill looks for post office box numbers on both street address lines. For example, let’s say one of your customers, James Rutherford, has a street address on the first address line and a post office box on the second address line. Now you enter J. Rutherford with the same address except the post office box is on the first line and the street address is on the second line. QuickFill will recognize J. Rutherford as a possible duplicate of James Rutherford.</td>
</tr>
</tbody>
</table>
Definitions

Address matching

To be recognized as a post office box the number must be preceded by "PO", "POB", "PO BOX", "BOX", or "POST OFFICE BOX". Periods, as in "P.O.", are ignored.

When the addresses have matching post office box numbers QuickFill modifies the rules used for matching street names. It does not deduct any points if one address has a house number, street name, or direction and the other does not. This means that "100 MAIN ST, PO BOX 100" and "PO BOX 100" are considered to be identical.

Match values 2

To move to the ‘Match values 2’ tab, click on the top of the tab. This tab contains the remaining address matching fields.

Only one address has a house number

This value is deducted from the score if only one record has a house number. QuickFill looks for the house number on the first street address line only.

Both have house numbers, but they do not match

This value is deducted from the score if both records have a house number but they do not match.

Only one address has a street name

This value is deducted from the score if only one record has a street name. Generally this occurs if one record has a post office box number and the other has a street address.

Street name soundex codes do not match

This value is deducted from the score if the street names do not sound alike.

Soundex codes match, actual street names do not

This value is deducted from the score if the street names sound alike but are spelled differently.

Only one address has an apartment/unit/suite number

This value is deducted from the score if only one record has an apartment number, unit number, suite number, or floor number. QuickFill assumes that any sequence of digits that follows the street name is an apartment, unit, suite, or floor number.

Apartment/unit/suite number does not match

This value is deducted from the score if both records have apartment, suite, unit, or floor numbers but they do not match.

Only one address has a prefix direction

This value is deducted from the score if only one record has a prefix direction. A prefix direction is one of the eight points of the compass, which appears before the street name (e.g., “100 NORTH MAIN ST”).

Prefix directions do not match

This value is deducted from the score if both records have a prefix direction but they do not match. Abbreviated directions (“N” and “NORTH”) are considered to match.
## Definitions

### Address matching

<table>
<thead>
<tr>
<th>Condition</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Only one address has a suffix direction</em></td>
<td>This value is deducted from the score if only one record has a suffix direction. A suffix direction is one of the eight points of the compass, which appears after the street name (e.g., “100 CONNECTICUT AVE NW”).</td>
</tr>
<tr>
<td><em>Suffix directions do not match</em></td>
<td>This value is deducted from the score if both records have a suffix direction but they do not match. Abbreviated directions (“N” and “NORTH”) are considered to match.</td>
</tr>
<tr>
<td><em>Only one address has a company name</em></td>
<td>This value is deducted from the score if only one record has a company name.</td>
</tr>
<tr>
<td><em>Company soundex codes do not match</em></td>
<td>This value is deducted from the score if both records have a company name but the first words of each name do not sound alike. If the company name begins with “THE,” the second word is used instead.</td>
</tr>
<tr>
<td><em>Soundex codes match, actual company names do not</em></td>
<td>This value is deducted from the score if the first words of the company names sound alike but the full company names are not identical.</td>
</tr>
<tr>
<td><em>Label images do not match, ignoring punctuation</em></td>
<td>This value is deducted from the score if the mailing labels for the two records are not the same, ignoring differences in punctuation and spacing. By default this value is set to zero so that differences in the mailing labels have no effect on the score. If you require that exact matches must have identical label images, then set this value to 1 and set the minimum score for an exact match to 100. You should also reduce the minimum score for near matches by 1, since near matches will never have identical label images.</td>
</tr>
</tbody>
</table>
Preferences

You use the ‘Preferences’ screen to specify options that apply to all of your publications. For example, it is here that you choose how you want to display dates.

The system preferences definition is divided into five tabs (General, Lookup, Batch reports, Label counts, and Mail merge), but you can see only one tab at a time. You can move easily between tabs by using the Ctrl-RightArrow and Ctrl-LeftArrow key combinations or your mouse.

To change the preferences settings, simply move the cursor to the field(s) you want to change and enter a new value or use your mouse buttons to display a list from which you can select a new value. Click on “OK” to save your changes on all of the system preferences definition tabs when you’re through entering data.

‘General’ tab

This tab contains the following system preference information:

**Home country**
Enter your home country by typing the code for it into this field or right clicking once in the field to select from a list of defined countries. QuickFill will suppress printing the country you enter here when it prints labels and other forms. For example, if you are based in Canada, then you enter a home country of “CANADA” and QuickFill will print Canadian labels without a country line. All other labels, including U.S.A., will include the country.

**Date format**
The normal, or default, date format for reports and for screen displays is MM/DD/YY, where “MM” is the month, “DD” is the day of the month, and “YY” is the year. If you enter a year before “50,” QuickFill assumes you’re into the 21\textsuperscript{st} century. So 02/01/97 is February 1, 1997, whereas 11/02/03 is November 2, 2003.

You can change the order of the month, day, and year and you can change the slashes between them to any other punctuation character. If you are a Canadian publisher you might specify DD/MM/YY, or if you are in Great Britain you might specify DD.MM.YY.

*Note: issue dates*

The date format you choose here has no bearing on the format of issue dates. Each publication can have its own issue-date format, and you
can choose from a much wider variety of formats than you can here (refer to the built-in help system for details on issue dates).

Region names
When you create a new database QuickFill defines just three regions: “U.S.A.”, “Canada” and “Foreign”. You can change how the countries of the world are divided into regions in any way you wish by changing the region numbers on the “Foreign Countries” definition screen and the region names here on this screen.

Default allowed usage for new customers
The QuickFill customer record has four “allowed usage” fields which control how you are allowed to use that customer’s postal address, email address, telephone number and fax number. For each of those address elements you can specify that you are allowed to rent the address or number to outsiders, that you may only use it for internal promotions, that you may only use it to send renewal notices, or that you may not use it at all (except to serve issues of course). On this screen you specify what the default values of these fields should be for new customer records. You can of course override those default values for each individual customer based on their instructions to you. The codes you should enter here are:

Y All uses allowed
I Internal use only
R Send renewals only
N No use allowed

Directory for reports
Enter the directory where you want to store your report files. You can either print reports immediately, then discard them, or you can save them in a file on disk to print later. The report files you save will be kept in the directory you specify here. This reports directory should be a subdirectory of the QuickFill database directory.

- To use a directory that is not a subdirectory of the database directory you must enter the full path; otherwise, simply enter the subdirectory name.

Directory for mail merge files
Enter the directory where you want to store mail merge files produced for bills, renewal notices, and promotions. The mail-merge directory should be a subdirectory of the QuickFill database directory.

- To use a directory that is not a subdirectory of the database directory you must enter the full path; otherwise, simply enter the subdirectory name.

Directory for temporary files
Enter the drive letter and the directory where you want to place the temporary files QuickFill creates when it runs reports, labels, bills, or renewal notices. The entry in this field is workstation specific and defaults to the location where Windows places its own temporary files. This is usually satisfactory but if you have more than one hard disk, you can make QuickFill run faster by placing the
Definitions

Preferences

temporary files on a separate disk from the database. We do not recommend that you place temporary files on a network drive.

ZP4 address correction server
ZP4 is the name of software from Semaphore Corporation that can be integrated with QuickFill for doing address correction and certification. If you have a copy of ZP4 installed then enter the name of the computer on which ZP4 is installed. After making the appropriate entry you must close the database and then re-open it for the changes to take effect. If you are not using ZP4 address correction and certification software with a multiuser QuickFill system (or with ZP4 on a network drive), leave this field blank. Refer to “How to,” “Certify customer addresses” in the table of contents for QuickFill’s built-in help system for more information on using ZP4 with QuickFill.

Limit address label width to 30 characters
If you have a printer that cannot print 40-character wide address lines (for labels, bills, and renewals), check this field so that QuickFill will restrict the title, company, department, street1, and street2 fields to their original length (30 characters in versions prior to 1.30) during data entry and imports. In addition, the city field will be restricted to its original length of 16 characters and, although the first name and last name fields will continue to allow entries of up to 20 and 30 characters respectively, when the name address line is constructed (from the prefix, first name, last name, and suffix) QuickFill will restrict the total width to 30 characters.

Note: limiting the address label width and dBASE label and customer export files
When you check this field, the width of the address label fields in dBASE label files and customer export files will still be 40 characters. However, because the length of the data that can be entered into the address fields in QuickFill will be restricted to 30 characters, none of the data in the address fields of your files should occupy more than 30 characters.

Use alphanumeric ACS key line format
This option affects the format of the ACSKEY field in the dBASE label files. You must choose the alphanumeric ACS key line format if you have or expect to have more than 10 million customer or order records in your database. If you change ACS key line formats then you will need to apply to the USPS for a new participant code.

Max detail lines per page on combo bill
It is possible for a combination bill to require more than one page to list all of the items ordered in the combination. In order to sort the bills correctly, so that the multi-page bills are grouped together, QuickFill needs to know how many lines are available for the order items on each page. For standard QuickFill combination bills, the value you enter here should be 18. If you have changed the combination bill layout then you should enter the number of lines available in your revised layout for listing the order items.
Like the combination bills, long form bills, renewals and acknowledgements used for gift subscriptions sometimes need more than one page to list all of the addresses of the ship-tos. In order to sort the forms correctly so that the multi-page forms are grouped together, QuickFill needs to know how many ship-to addresses can fit on each page. For standard long form bills, renewals and acknowledgements the value you enter here should be 8. If you have changed the gift bill, gift renewal or gift acknowledgement layout then you should enter the number of address slots available in your revised layout.

This tab contains system preference information that affects the lookup screen. This field determines the sequence in which QuickFill displays the customer records when you perform a lookup that includes a zip code. The default sequence is ‘Zip/Name/Company’ which gives you a list sorted by country name, zip code, customer name and then company name. However, if you need the ability to lookup companies within zip code, you can change the sequence to ‘Zip/Company/Name’, in which case the list is sorted by country name, zip code, company name and then customer name.

This option also affects the sequence in which QuickFill does address matching. For more information refer to the built-in help system for details on address matching.

Please note that the ‘Lookup sequence’ may only be changed when running QuickFill in single-user mode. (Refer to the built-in help system for details on single user mode.) In addition, changing this field requires the updating of match codes for all customers in your database. For larger databases, this may take a while. We strongly suggest making a backup copy of your database before changing this field.

Normally QuickFill displays the customers on the lookup screen using black text on an off-white background. You may find it useful to highlight customers with specific characteristics in order to make it easier to find the person you need when doing data entry. For example, you may have lots of prospect records in your database and would like to separate them from the subscribers. Or perhaps you have a publication with mixed paid and controlled circulation and you would like to distinguish between them.

The color-coding is specified using a table of colors and characteristics. For each customer QuickFill scans the table from top to bottom testing the customer to see if the characteristics match. If they do, then the customer is displayed using the color specified in that row of the table.

When choosing characteristics for your customers, be aware that many of the categories overlap. For example the same customer can match both “Has at least one active subscription” and “Has at least one subscription that was
canceled for non-payment." So place the characteristics that have the greatest important to you at the top of the list.

You do not have to use a different color for each characteristic. So you could assign the color gray to both "Has one or more subscriptions, all of which are inactive" and "Prospect only, has no subscriptions."

The last entry in your list of characteristics should always be “All others”. Use this to specify the color for customers who do not match any of the characteristics you listed.

Note: changing color-coding scheme

After you change the color-coding specifications you must click “OK” on the “Preferences” screen, then open a new ‘Lookup’ tab to see the effects. Existing lookup tabs will continue to use your old color-coding scheme.

‘Batch reports’

This tab contains the following system preference batch report information:

Company name for batch reports

This is the name QuickFill prints on all batch reports for all publications. If you have different company names for different publications, decide which one you want to use for your reports. Right click to select a company from a list of companies you have defined.

Print batch reports when batch is closed

QuickFill always generates batch reports when you finish entering a batch of new orders, payments, renewals, or prospects. The batch report lists the payments you received. It also includes an optional section that details the accounting effects of each transaction you entered, and for new order batches it includes an optional section listing the customer names and addresses (see chapter 7, Transactions, p. 7.27, for details on batch reports).

In this field, you choose whether you want to print the batch report as soon as you close the batch. QuickFill leaves this field blank by default, which means QuickFill creates a batch report file but doesn’t print it immediately. So you can wait until the end of the day to print your batch reports or print them on another computer.

You can print the batch reports by selecting ‘Print...’ under ‘Reports’ on the main menu (see chapter 10, Reports, p. 10.18, for details on printing reports).

If you check this field, QuickFill will print the report immediately after you post a batch. If you are going to check this field, you should have a printer available from the computer on which you are running QuickFill. If you don’t have a printer available and you check this field, you’ll get an error message when QuickFill tries to print the report.
In this field, you choose whether or not you want to include the accounting section in the batch report. This section contains a detailed record of the amounts debited and credited to each account. It provides the audit trail you need to substantiate the entries you made in your general ledger. Leave this field blank, if you want QuickFill to produce only the payments section of the batch reports. Otherwise, make sure this field is checked.

We recommend you print this section of the report, at least until you feel comfortable with the accounting data QuickFill provides (see chapter 7, Transactions, p. 7.27, and chapter 11, Accounting, p. 11.4, for details on batch reports and an overview of accounting respectively).

Here you choose whether you want to include the list of customer names in the reports for new order batches. This list can be a useful audit trail, especially if you ever need to reenter some batches. If you want to include a customer list in new order batch reports, check this field. Otherwise, leave this field blank.

If you want to include a list of all payments in each batch report, check this field. Otherwise, leave this field blank. This list is useful when creating the deposit record for the bank.

This tab contains the following system preference label count settings:

Whenever QuickFill prints labels (either issue labels or promotional labels), bills, or renewals it also generates a report that shows the number of labels, bills, or renewals produced, broken down by U.S. state, by sectional center (for labels only), by Canadian province, or by foreign country. Choose which breakdowns you want QuickFill to produce by checking your selection(s). If you leave all four fields blank, QuickFill will only print a single summary page that shows the number of U.S., Canadian, and foreign labels, bills, or renewals.

Use upper case only for addresses on...

When you enter names and addresses into QuickFill it is best to use upper- and lower-case. The addresses will look better that way if you use them in form letters. However, the Postal Service prefers that the addresses on the issue labels, bills, and renewal notices be all upper-case. Check these two fields and QuickFill will convert the addresses to upper-case when it prints the labels, bills, and renewal notices. Leave these fields blank and QuickFill will print addresses exactly the way you entered them.

This tab contains the following system preference mail-merge information:
Definitions

Preferences

Bill and renewal mailmerge files should be…

Use these radio buttons to specify whether you want QuickFill to create dBASE mail-merge files or delimited bill and renewal notice mail-merge files. (The field names for delimited mail-merge files are included in the first record of each file.) If you want QuickFill to create delimited files, you should make sure that the field and record separator fields contain the desired separators.

Note: bill and renewal mail-merge files

In order to create bill and renewal mail-merge files, you must define your billing packages and renewal packages to create mail-merge bills/renewals using the “MMERG1,” “MMERG2,” “MMERG3,” or “MMERG4” format.

In addition, if you are not going to further process the mail merge files (that is you are going to simply merge and print them), select the option to create delimited files.

Separators…

In these fields, you tell QuickFill the field and record separator characters for the word processor you’ll use on your mail-merge files.

These fields default to a comma for the “field separator” and a carriage return/line feed for the “record separator.” If you want to use a different set of separators, just change these values.

Note: encoding separators

You must encode field separator characters. That is, you enter characters that you can’t normally enter from the keyboard by typing a backslash (‘\’), followed by a three-digit decimal code. So, if you want to use a carriage return and line feed as the record separator, enter \013\010. For information on converting characters to decimal codes, refer to “ASCII character chart” in QuickFill’s built-in help system’s index.

Create separate mailmerge files…

Check this field if you are using the MMERG4 format or e-mail renewals and you want QuickFill to create separate files for each publication. Creating separate files for each publication is the default behavior since it allows you to create separate mail-merge document templates with customized text for each publication. If you uncheck this box QuickFill will create just one mail-merge file for each billing, renewal or issue label update run. This is useful if you have a large number of publications. Note that regardless of whether you check this box or not, QuickFill will always create separate mail-merge files for each ‘Form set code’ specified in the billing or renewal package record.

Bill and renewal address lines…

Select ‘Vertically centered’ if you want QuickFill to vertically center customers’ addresses in the address fields of your mail-merge bill and renewal files; this helps to keep addresses centered in envelope windows. Otherwise, select ‘Top justified with no leading blank lines’.
Definitions

Preferences

Renewal price data  Select ‘Vertically centered’ if you want QuickFill to vertically center renewal price data in the offer fields of your mail-merge renewal files; this helps to vertically center renewal prices within the pricing block of your mail-merge notices. Otherwise, select ‘Top justified with no leading blank lines’.

Note: centering renewal price data

The ability to center renewal price data only applies to the “MMERG1,” “MMERG2,” and “MMERG3” formats when the mail-merge renewal file is for a publication that uses stepped pricing. (Renewal price data may be centered for the “MMERG4” format regardless of a publication’s pricing method.)

For more information on mail-merge bills and renewal notices, refer to the built-in help system for details on the ‘Billing’ update and the ‘Renewal notices’ update. You should also read about mail-merge or form letters in your word processor manual. See appendix D, Mail Merge, for more details on how to create mail-merge files for bills and renewal notices.
Chapter 9

Updates

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Updates menu

Any update you run from the ‘Updates’ menu can affect all or most of the subscribers to a publication at one time. When you run an update, QuickFill examines all the subscriptions to one or more publications. Then, depending on the status of each subscription, it performs functions such as generating bills or renewal notices, creating issue labels, and/or changing the status of the subscription. Some of the updates perform two or more functions at once. The ‘Issue labels’ update, for example, generates labels for issues. But it also changes the status of a subscription from “active” to “expired” as soon as it creates the label for the last issue in the subscription.

Note: custom updates

If you have purchased and installed additional custom update programs, they will appear under the ‘Custom updates’ menu item. A custom update will only appear as a menu option if it is compatible with the version of QuickFill you are running. If a custom update disappears from the menu after installing a new version of QuickFill, either you forgot to install the updated version of the custom program or we forgot to send it to you. If you cannot find the correct version of the program, please call CWC Software.

Unlike many other fulfillment systems, QuickFill doesn’t tie you to a rigid schedule for running updates. Depending on the fulfillment policies you chose under ‘Definitions’, you can run some of the updates as frequently as once a day or as infrequently as once a month. Say, for instance, you want to send new subscribers their first issue as quickly as possible. You can enter new orders daily and run the ‘Issue labels’ update at the end of each day. See chapter 13, Jobs, for details on job lists and the factors you should consider in scheduling each of the updates.

The Updates menu offers the following commands:

Billing Update

The ‘Billing’ update generates bills, suspends or cancels orders for nonpayment, and writes off small amounts due according to the definitions for your publications and billing series. See p. 9.9 for an overview of the ‘Billing’ update.
<table>
<thead>
<tr>
<th>Updates Menu</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Issue Labels Update</strong></td>
<td>The main function of the ‘Issue labels’ update is to generate labels for issues. However, this update also performs the following actions: it produces labels for premiums, produces bills if you send the first bill with the first issue for a new order, produces renewal notices and renewal labels if you use “by issues” renewal series, reactivates temporarily suspended subscriptions, cancels orders at expiration and writes off amounts due, changes active orders to expired and future orders to active, sets the status of orders to graced, and writes off small amounts due. See p. 9.22 for an overview of the ‘Issue labels’ update.</td>
</tr>
<tr>
<td><strong>Renewal Notices Update</strong></td>
<td>The ‘Renewal notices’ update generates renewal notices and renewal labels for “by days” renewal series according to the definitions for your publications and renewal series. See p. 9.33 for an overview of the ‘Renewal notices’ update.</td>
</tr>
<tr>
<td><strong>Credit Card Charges Update</strong></td>
<td>The ‘Credit card charges’ update processes credit card charges entered into your database since the last time the update was run. This update creates a file that can be electronically transmitted to your bank. See p. 9.41 for an overview of the ‘Credit card charges’ update.</td>
</tr>
<tr>
<td><strong>Refunds Update</strong></td>
<td>The ‘Refunds’ update produces a list of subscriptions that are to receive refunds and changes the subscription’s order record to show that a refund has been issued. See p. 9.43 for an overview of the ‘Refunds’ update.</td>
</tr>
<tr>
<td><strong>Make Trial Subscriptions Update</strong></td>
<td>The ‘Make trial subscriptions’ update creates subscriptions for existing customers and prospects in your database. See p. 9.46 for an overview of the ‘Trial subscriptions’ updates.</td>
</tr>
</tbody>
</table>
### Updates

**Updates menu**

<table>
<thead>
<tr>
<th>Update</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cancel Trial Subscriptions Update</strong></td>
<td>The ‘Cancel trial subscriptions’ update is used to perform mass cancellations of zero priced, zero paid, non-renewed trial subscriptions. See p. 9.46 for an overview of the ‘Trial subscriptions’ updates.</td>
</tr>
<tr>
<td><strong>Make Controlled Subscriptions Update</strong></td>
<td>The ‘Make controlled subscriptions’ update is used to create controlled subscriptions for prospects or to reactivate expired subscribers. We recommend that you run the ‘Qualified circulation’ report prior to running this update so that you can determine the impact that the ‘Make controlled subscriptions’ update will have. (This update may only be accessed from the audit system.) See p. 9.47 for an overview of the ‘Controlled subscriptions’ updates.</td>
</tr>
<tr>
<td><strong>Cancel Controlled Subscriptions Update</strong></td>
<td>The ‘Cancel controlled subscriptions’ update is used to perform mass cancellations of nonpaid subscriptions. We recommend that you run the ‘Qualified circulation’ report prior to running this update so that you can determine the impact that the ‘Cancel controlled subscriptions’ update will have. (This update may only be accessed from the audit system.) See p. 9.47 for an overview of the ‘Controlled subscriptions’ updates.</td>
</tr>
<tr>
<td><strong>Merge Duplicates Update</strong></td>
<td>The ‘Merge duplicates’ update searches through your database for duplicate customer records and merges them together. See p. 9.48 for an overview of the ‘Merge duplicates’ update.</td>
</tr>
<tr>
<td><strong>Purge Updates</strong></td>
<td>The Purge updates do not cause the size of your database to decrease, but they do make space available for new records so that your files will not grow as fast as they would have otherwise. See p. 9.49 for an overview of the Purge updates.</td>
</tr>
<tr>
<td><strong>Purge Expired Subscriptions Update</strong></td>
<td>The ‘Purge expired subscriptions’ update deletes expired subscriptions. This update also</td>
</tr>
</tbody>
</table>

**QuickFill**
Updates

Updates menu

provides the option of creating a prospect record for each subscription being purged.

Purge History Orders Update
The ‘Purge history orders’ update deletes order records that are no longer active, but does not delete the subscription or customer records.

Purge Subscription History Update
The ‘Purge subscription history’ update allows you to delete information from the subscription history of customers.

Purge Prospects Update
The ‘Purge prospects’ update allows you to delete prospect records based on mailing list and/or the date on which the prospects were entered into your database.

One-shot Labels Update
The ‘One-shot labels’ update allows you to print the one-shot labels that have accumulated since the last time the update was run. See p. 9.51 for an overview of the ‘One-shot labels’ update.

Change Billing Series
Use the ‘Change billing series’ update to switch a group of orders from one billing series to another. See p. 9.52 for an overview of the Change series updates.

Change Renewal Series
Use the change renewal series update to switch a group of orders from one renewal series to another. See p. 9.52 for an overview of the Change series updates.

Update addresses
Use this update to manipulate the name and address fields of customers’ records. See p. 9.53 for an overview of ‘Update addresses’.

Fix orders
Use this update to make mass corrections to orders. You can also use it to extend subscriptions. See p. 9.54 for an overview of ‘Fix orders’.

Refer to the built-in help system for more information on any of the above updates.
Updates

Preliminary steps

Definitions
Before you run any updates, it is important to understand that many of the policies you set up under ‘Definitions’ determine what happens when you run the various updates. Therefore, you should make sure you are familiar with each of the definitions. It is especially important to check the definitions that affect your bills, labels, and renewal notices.

Billing update
Before running the ‘Billing’ update for the first time, check that the issue table has enough entries to include the expiration issue of the longest order you expect to bill. In practice, this just means selecting ‘Issues’ under ‘Definitions’ on the main menu and making sure that you defined issues for the next few years. If you do not have enough issues defined for an order, QuickFill won’t produce a bill for that order, and you’ll see an error message to that effect in the billing update report. You can then add the issues you need and either rerun the update—it will produce bills only for the orders that it skipped the first time—or leave these orders for the next scheduled billing update.

You should also verify that you’ve set up the billing series and messages just the way you want them. The most important items to check are that the days between efforts are correct and that the messages are the ones you want to use.

Renewal notices update
Before running the ‘Renewal notices’ update (to produce notices for “by days” renewal series) for the first time, you should also check the issue table to see that it has enough entries to include the expiration issue of the longest order you expect to renew. You can check this information that same way you did for the ‘Billing’ update (see above). The ‘Renewal notices’ update works the same way as the ‘Billing’ update in that if you don’t have enough issues defined for an order, QuickFill won’t produce a renewal notice for that order, and you’ll see an error message in the renewal update report. You can then add the issues you need and either rerun the update—it will produce notices and renewal labels only for the orders that it skipped the first time—or leave these orders for renewal on your next scheduled ‘Renewal notices’ update. (See chapter 8, Definitions, p. 8.28, for details on defining issues).

In addition, you should also verify that you’ve set up the renewal series and messages just the way you want them. It is most important to check that the prices and the days between efforts are correct and that the messages are the ones you want to use.

QuickFill
Updates

Preliminary steps

**Issue labels update** If you are printing expiration dates on the labels, check to see that you’ve defined enough issues in the issue table to cover your longest subscription. (You can tell by running the ‘Expire inventory’ report. Subscriptions that expire with an issue that has not yet been defined will be reported as expiring with an “unknown issue” number.) QuickFill will print a row of “X’s” instead of the expiration issue date for customers whose subscriptions expire with an issue that has not yet been defined. In addition, you’ll see error messages in the ‘Issue labels’ update report.

If you’re using label split tables, check to make sure that the correct table is linked to your publication (on the ‘Issue labels’ tab of the publication definition) and that it has been defined correctly. See chapter 8, Definitions, p. 8.23, for more information on label split tables.

If you’re sending new subscribers bills with their first issue, you should also verify that you’ve set up the billing series and messages just the way you want them. The most important items to check are that the days between efforts are correct and that the messages are the ones you want to use.

If you’re sending subscribers renewal notices with their issue, you should also verify that you’ve set up the renewal series and messages just the way you want them. The most important items to check are the prices and the timing for each effort and that the messages are the ones you want to use.

*Note: bills and renewals from the ‘Issue labels’ update*

QuickFill won’t produce bills with the ‘Issue labels’ update unless you choose to send a bill with the first issue. You make this choice on the publication definition screen, but you can override it when you define an offer or a billing series.

In order for QuickFill to produce renewals with the ‘Issue labels’ update, you must be using at least one “by issues” renewal series. (Refer to the built-in help system for more details on “by issues” renewal series.)

**Disk space** Prior to running an update, you should also check to make sure that you have enough disk space for the output that will be created. This is especially important for the ‘Billing’, ‘Issue labels’, and ‘Renewal notices’ updates.

Click on the ‘About QuickFill’ toolbar button—or select ‘About QuickFill’ from the ‘Help’ menu to see how much space you have available on your disk. You’ll probably need about 2k for each bill and each renewal notice, and .3k for each issue label and renewal label. If you run out of disk space in the middle of the update run, QuickFill aborts the run, and you’ll have to restore your database from your backup. Then you can free up some disk space.
Updates

Preliminary steps

space and rerun the update. However, we strongly recommend that you make sure you have enough disk space before you begin.

Backups  If an update fails to run to completion, you cannot restart it. QuickFill will not let you access your database after an incomplete update. You must restore your database and start the update again. For this reason, it is extremely important that you make a backup of your database before running any of the updates. (Refer to chapter 6, File commands, p. 6.6, for more information on backing up your database.)
Billing Update

What it does
As you might expect from the name, the billing update creates bills for “bill-me” orders. It scans the database searching for orders that have never been billed or whose last bill was sent sufficiently long ago that a follow-up bill is needed.

The billing update does not actually print the bills, rather it creates one or more files which can be printed at your convenience. By default it creates standard QuickFill bill files that are directly printable from within QuickFill by going to the ‘Reports’ menu and selecting the ‘Print…’ command. The format of the printed bills can be customized using the Form Designer application. Alternatively, you can instruct QuickFill to create files that can be printed using the “mail merge” feature of Microsoft Word or any other word processor. You choose the type of bill file to be produced on the definition screen for your billing packages.

When and how the first bill is sent by QuickFill is controlled by policies that you set when you define your offers and/or your publications. There is a great deal of flexibility. You can choose to send the first bill immediately; with the first issue of a new subscription; or you can choose to delay the first bill until a few days after the first issue has been sent (to ensure that the subscriber gets the issue before he gets the bill).

Once the first bill has been sent, the timing of the remaining bills is controlled by the billing series definition screen. On this screen you specify how many bills should be sent and how many days should elapse between bills. You can also specify when the subscription should be suspended—that is say, no more issues will be sent until payment is received. When all the bills specified on the billing series have been sent and a suitable number of days has elapsed after the last bill the subscription will be canceled for nonpayment and the amount due will be written off.

As you might also expect from the name, the billing update makes changes to the orders that it bills. For each bill that it sends it stores the effort number that was sent and the date it was sent in the order record. This information is used in future runs of the billing update to decide when it is time to send the next bill, and if so, which effort in the series should be sent.
Updates

Billing update

Combination bills

Normally QuickFill bills each item ordered on a separate bill. A customer that sends you a bill-me order for a magazine subscription and a book will receive two bills—one for the subscription and one for the book. Sometimes this is an advantage, since you can have different billing series for each order, so that you avoid shipping the book before payment is received, while allowing the serving of the first few issues of the subscription to begin immediately. Other times this just confuses the customer, and you would like to send just one bill for both of the items ordered.

To produce “combination bills,” that is bills with more than one item on them, you should check the box labeled “unpaid orders using this series...may be automatically linked together and billed as a combination order” on the billing series definition screen. Checking this box causes the billing update to make a preliminary pass through the database looking for orders that meet these conditions:

- Have the same bill-to customer
- Have the same order date
- Have the same billing series, which is eligible for combination billing
- Have the same purchase order number, if present
- Have never been billed
- Are not agency orders

Matching orders that meet these conditions are linked together into a combination order. The combination order is assigned a number that can be used to display a list of the orders on the lookup screen. Alternatively, If you look up any one of the orders by its order number you will see a ‘Combo’ button on the lookup screen which you can use to see the other orders in the combination.

Once orders are linked into a combination they will be billed together, on a single bill.

Suspension

In your billing series definition you designate one of the efforts as the “suspend” effort. When the billing update sends that effort in the billing series it will change the status of the subscription to “suspended for nonpayment”. From this point on no more issues will be shipped until payment is received. When you enter the payment the subscription will be reinstated and serving of issues will continue, although some issues may be missed (you control how
many issues are missed by setting the “Maximum number of issues to backstart reinstated orders” field on the publication definition screen.

Cancellation and write off

When an order reaches the end of the billing series, and you’ve still received no response, the billing update cancels the order for nonpayment and writes off the amount due. If you are using the accrual accounting system this amount will be shifted from the ‘Accounts Receivable’ account to the ‘Write off’ account in the general ledger. If you are using the cash accounting system then there is no ‘Accounts Receivable’ account and there will be no write off.

In addition to writing off the full price of the order when the billing series ends, the billing update may also automatically write off small amounts that are not worth billing. The minimum amount that you consider to be worth billing is specified by setting the “Smallest amount to be billed” field on the ‘Billing’ tab of the publication’s definition screen. (See chapter 8, Definitions, p. 8.41, for details on defining the minimum dollar amount to be billed.) These small write offs occur immediately as soon as they are detected by the billing update, without sending any bills.

Payment transfers

Sometimes, as a result of misunderstandings, the billing update may encounter subscriptions with an unpaid order that is followed by a fully paid renewal. Typically this happens when a payment for the unpaid order is erroneously entered as if it were a renewal. In this situation the billing update will bill the unpaid order until the billing series reaches its end. Then, instead of cancelling the subscription it will transfer the payment from the paid renewal order to the original unpaid order, then continue by sending a bill for the renewal order, which is now unpaid.

Advance renewals

Sometimes a subscriber may send you a bill-me renewal well in advance of the expiration of his existing subscription. In this situation QuickFill will send bills for the renewal order, although you can choose to delay billing of the renewal order until its first issue is served (see the ‘Billing’ tab of the publication definition screen for this option). If the end of the billing series is reached and no payment is received QuickFill is faced with a quandary. It can’t cancel the subscription because the current order was paid for and has not expired. The billing update solves this problem by removing the unpaid renewal order and restarting the renewal series of the prior order, in the hopes that the subscriber will send in a paid renewal.
Updates

Billing update

Cancel bills

After the billing series has completed and you have still not received payment there is available one last-ditch effort that might bring in some revenue—this is called the "cancel bill." This bill is sent after all of the regular bills have been sent, after the subscription has been canceled. The amount of the bill is prorated based on the number of issues that were sent to the subscriber. So if the subscriber received three issues out of a twelve-issue subscription, then the cancel bill would be for 25 percent of the original subscription price. Typically you add a message to the bill such as "this bill is for the issues you have already received." Quite often you will find that the subscriber will respond to this bill and send you the prorated payment. The cancel bill feature is optional—you enable it by filling in the cancel bill fields on the ‘Billing’ tab of the publication definition screen.

For a more detailed description of the ‘Billing’ update see this chapter, p. 9.16.

When to run it

You can run the billing update once a month or you can run it more or less frequently. Each strategy has its pluses and minuses.

If you run the billing update monthly, you'll produce a larger number of bills with each run. Doing so may be more convenient for you than producing smaller groups of bills more frequently, especially if you use a mailing house to mail the bills. The disadvantage of monthly billing is that QuickFill may not generate a first bill for new orders until several weeks after you've served the first issue. If you decide to run bills monthly, set the days between efforts in your billing series to a relatively low number, such as 21. This will ensure that each unpaid order gets billed each month, even if you change the day of the month on which you run the update.

If you decide to run the billing update more frequently (weekly is probably a good schedule), you'll produce fewer bills on each run. Getting fewer bills is more convenient if you have a relatively low volume of orders and don't use a mailing house. Moreover, you can then send a first bill for new orders shortly after serving the first issue. If you decide to run the billing update more frequently than once a month, set the days between efforts in your billing series to the actual number of days you want between efforts. In this way, QuickFill will generate a bill on the next run after the correct number of days have elapsed (refer to the built-in help system for details on setting up billing series).

Another advantage of running this update more frequently is that you have greater control over the time that elapses between successive bills. For example, you could allow six weeks to elapse between the first and second bills and four weeks to elapse between the next bills in your series.
Updates

Billing update

How to run it
Refer to the built-in help system for instructions on how to run the ‘Billing’ update

What it produces
The billing update can produce the following:

- simple bills that you can print from within QuickFill (see appendix C, Sample forms, p. C.3, for a sample simple bill).
- detailed bills for gift and group subscriptions that you can print from within QuickFill (see appendix C, Sample forms, p. C.16, for a sample detailed bill).
- bills in a file that, depending on the ‘Bill format’ selection you have made on the billing package definition screen (refer to the built-in help system for details on this billing package definition field), you can use with the mail-merge facility of your word processor;
- billing update report;
- billing batch report.

Bills
The following describes the data the bills contain and tells you how you can control what actually appears on the bills. (Refer to “Definitions,” “Billing,” “Simple bill” in the table of contents for the help system for a complete bill layout.)

- Address. The customer to whom the bills are addressed depends on whether or not the order came from a subscriptions agency, the type of subscription, and what you entered in the ‘Who’ field of the billing series definition.

  For agency orders, the bill is always addressed to the agency.

  For single-party subscriptions, the bills are addressed to the subscriber.

  For two-party subscriptions, the bills can go either to the ship-to customer or the bill-to customer.

  If you do not select the ‘Send to ship-to’ field for a billing effort, the bill goes to the bill-to customer. If you do select the ‘Send to ship-to’ field (by clicking on it once so that a check mark appears), it goes to the ship-to customer. If this is a “cancel bill” it always goes to the bill-to customer (refer to the built-in help system for details on billing series and specifying to whom a bill should go).

  For group subscriptions, the bills are addressed to the bill-to customer, regardless of the ‘Send to ship-to’ field.
Updates

Billing update

- Company name and return address. Whether or not your company name is printed on the bill depends on the choice you made in the ‘Print company name on bill?’ field of the company definition screen.

- Space for a credit card number and signature. QuickFill prints this only if you selected the ‘Print credit card info block on bills?’ field of the billing package screen. You can use different billing packages for each effort in a billing series, so you can allow credit card payments on some of the efforts in the series and not on others.

- Order number. After the order number, you’ll see a dash followed by a ‘B’ and the effort number that produced the bill. If, for example, the order number is 5678 and the billing effort is 3, QuickFill prints 5678-B3 on the bill. The effort number for cancel bills is 0.

- Number of copies. QuickFill prints the number of copies for the order if it is greater than 1.

- Shipping charge. If there is no shipping charge, QuickFill prints N/C next to the shipping description.

- Sales tax. If there is no sales tax, QuickFill won’t print a tax line.

- Credit. If the customer has sent a partial payment, it shows as a credit.

- Messages. QuickFill centers the first four-line message block at the top of the lower half of the billing form. It prints the second four-line message block in the lower left-hand corner of the form. The text of the messages comes from the entries you made in the billing series definition screen—except for the cancel bill. The text for the cancel bill messages comes from the entries you made in the publication definition screen. (See appendix C, Sample forms, p. C.3, for a sample bill.)

- Expiration date. The date following the phrase “this bill is for service through” is the expiration date for the order QuickFill is billing. If a subscription has one or more future orders it will not be the same as the expiration date for the entire subscription. (See chapter 7, Transactions, p. 7.11, for an explanation of orders, subscriptions, and customers.)

- Check payable to. QuickFill prints this only if you filled in the ‘Checks payable to’ field in the publication definition screen. (See chapter 8, Definitions, p. 8.37, for details on the ‘General’ tab of the publication definition screen.)

- Federal tax ID number. QuickFill prints the tax ID number only if you entered your federal tax ID number in the company definition screen.

- Publication name. QuickFill prints the publication name on the top and bottom portions of bills if you selected the ‘Print publication name on the
Updates

Billing update

top half of bill’ and the ‘On bottom half of bill’ fields on the “Defining billing series” screen.

- QuickFill also prints document descriptors (such as “SUBSCRIPTION INVOICE,” “Please return this portion.” and “FOR YOUR RECORDS”) on bills. The text of the document descriptors comes from the entries you made in the document descriptor fields of the billing series definition screen.

**Customized bills**

As described above QuickFill gives you quite a lot of control over the content of the bill, but if you want to customize the layout of the bill then you have two choices.

1. Modify the layout of the standard bill by using the QuickFill Form Designer. (See chapter 14, Printing, p. 14.8, for more information on the QuickFill Form Designer.)

2. Produce mail-merge files instead of standard bills. These files can be processed by the mail-merge feature of Microsoft Word or any other word processor. There are four different mail-merge file layouts available known as MMERG1 through MMERG4, all of which can be produced in either dBASE or delimited format. We supply sample mail-merge document templates for the MMERG4 file layout and Microsoft Word. By editing this template you can change the layout of the bill as you desire.

Please note that this option is not available for gift bills and group subscriptions that require a complete list of the recipients. Nor is it available for combination bills. The reason for this restriction is that bills with a variable number of ship-to addresses (for gift bills) or a variable number of order items (for combination bills) cannot be represented in any file format that a word processor can handle.

Refer to “Updates menu,” “Billing update,” “Custom bills” in the table of contents for the built-in help system for more information on mail-merge bills.

**Sort sequence**

QuickFill sorts the bills in the following order:

1. publication,
2. form set code (from the ‘Form set code’ in the billing package definition),
3. billing package code,
4. number of pages (for detailed bills and combination bills only),
5. country,
6. zip code.

If the bill goes to an agency, QuickFill uses a dummy country code (ZZZZ) and the agency code instead of the zip code. As a result, QuickFill prints agency bills after all the other bills, then groups them together by agency.
Updates

Billing update

*Batch report* Whenever the billing update writes off an amount due or transfers money from one order to another, it generates journal entries for its accounting records.

*Billing update report* The billing update report contains these sections:

- Error messages. QuickFill produces this section only if there are, in fact, errors to report. Refer to “Error messages” in the built-in help system’s index for a list of the possible error messages.

- Billing report by effort number. This section reports the number of bills generated for each effort in a billing series and the total amount billed.

- Billing statistics. QuickFill only produces this section if you have selected the ‘Include counts by’ fields on the “System preferences” definition screen. This section breaks down the number of bills produced by U.S., Canadian, and foreign: by state; by Canadian province; and by foreign country. You choose which of these statistical sections should be included in your report by selecting ‘Preferences’ on the ‘Definitions’ menu. See chapter 8, *Definitions*, p. 8.71 for details.

- Billing report by package. This section reports the number of bills generated broken down by the package code and publication.

- Mail-merge bill directory. QuickFill produces this section only if you’ve generated mail-merge bills. The section lists all the mail-merge bill files QuickFill produced. It shows the file name, the format code, the publication, and the form type you require to print the bill.

*Details of what it does* You don’t need to understand all the details of how the billing update works in order to use QuickFill successfully. Read this section only if you’re interested in a more detailed account of what the billing update actually does. Rest assured, you can safely skip this section if you like.

The billing update examines every subscription to the publication(s) you selected to determine whether or not an order in that subscription needs a bill. It does not process subscriptions that have been suspended temporarily or indefinitely. Presumably, they have been suspended because of a bad address or because the customer has notified you that he or she will be away temporarily. It wouldn’t make sense to send bills to these customers. QuickFill does, of course, generate bills for subscriptions that have been suspended for nonpayment.

QuickFill bills only one of the orders that make up a subscription at a time. That is, if a customer has an unpaid trial order, say, and an unpaid full-term order, QuickFill bills only one. (When the customer pays for one order, QuickFill bills the other order.) The order QuickFill will bill—that is, the
“billing order”—is the oldest order with an amount due. Usually, this is either the active order for which you’re serving issues or a future unpaid order.

The billing update can affect more than one order. Once QuickFill selects the billing order, it checks to see if the amount due is less than the minimum bill amount you specified on the publication definition screen. If it is, it writes off the amount due and checks to see if another order in the subscription needs a bill.

Say, for example, a customer made a partial payment on his or her active order, and the amount due is now less than the minimum bill amount you specified on the publication definition screen. Say, too, the customer has an unpaid future order. In this case, the billing update first writes off the small amount due for the active order, then generates a bill for the future order.

QuickFill won’t generate a first bill for new orders if your policy for that publication is to send the first bill when you serve the first issue. Instead, QuickFill generates the first bill when you run the ‘Issue labels’ update that generates the label for the first issue.

**Combination Bills**

Normally QuickFill bills each item ordered on a separate bill. A customer that sends you a bill-me order for a magazine subscription and a book will receive two bills—one for the subscription and one for the book. Sometimes this is an advantage, since you can have different billing series for each order, so that you avoid shipping the book before payment is received, while allowing the serving of the first few issues of the subscription to begin immediately. Other times this just confuses the customer, and you would like to send just one bill for both of the items ordered.

To produce “combination bills”, that is bills with more than one item on them, you should check the box labeled “unpaid orders using this series...may be automatically linked together and billed as a combination order” on the billing series definition screen. Checking this box causes the billing update to make a preliminary pass through the database looking for orders that meet these conditions:

- Have the same bill-to customer
- Have the same order date
- Have the same billing series, which is eligible for combination billing
- Have the same purchase order number, if present
- Have never been billed
- Are not agency orders
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Billing update

Matching orders that meet these conditions are linked together into a combination order. The combination order is assigned a number that can be used to display a list of the orders on the lookup screen. Alternatively, if you look up any one of the orders by its order number you will see a “Combo” button on the lookup screen which you can use to see the other orders in the combination.

Once orders are linked into a combination they will be billed together, on a single bill.

Cancel Bills

Usually, canceled orders have no amount due and, therefore, QuickFill doesn’t generate a bill for them. Sometimes, however, canceled orders do have an amount due. If they do, QuickFill can produce a special cancel bill for them. This bill is for an amount equal to the value of the issues you sent to the customer—and for which he or she has not paid. QuickFill generates only one cancel bill per order. You specify on the publication definition screen the messages and package you want to use for this bill.

QuickFill generates a cancel bill if your publication policy is to bill cancels or if the customer requested that you cancel the order and you specified, when you entered the ‘Cancel’ transaction, that you wanted to send a cancel bill. After it generates the cancel bill, QuickFill waits the number of days specified on the ‘Billing’ tab of the publication definition screen before writing off the amount due on the order.

For noncanceled orders, the billing update checks the billing series linked to the order to determine how to process the order. (For details on billing series, refer to “Definitions,” “Billing,” “Series” in the table of contents for the built-in help system.)

If the billing series has not yet started

- If the billing order is a renewal order and you haven’t checked the ‘Delay the billing of renewal orders until their first issue has been served’ field on the ‘Billing’ tab of your publication definition and/or specified an “Earliest date” (see below), QuickFill produces the first bill immediately.

- If the billing order is a new order, QuickFill either produces the bill immediately or it can wait to produce the first bill after a set number of days has passed since you served the first issue for the subscription. You set the billing policy when you define the offer for that order. If you leave the billing policy fields blank, QuickFill uses the policy you specified on the publication definition screen.

- If the offer used to create the order specifies that QuickFill shouldn’t generate a bill until an “Earliest date,” the update produces a bill only on or after that
Updates

Billing update

date. (The offer is linked to the tracking code for a new order and to the renewal effort for a renewal order.) For example, say you specified on your renewal notice “Renew now—you’ll receive no bill until after the New Year” and filled in “01/01/07” in the ‘Send first bill earliest date’ field of the offer you used. The billing update you run on December 31 won’t produce a bill immediately, as it ordinarily would for renewal orders, but the one you run on January 1 will.

For renewal orders, if the offer used to create the order specifies that QuickFill shouldn’t generate a bill until an “Earliest date” and your publication policy is to delay bills for renewal orders until the first issue has been served, the update produces a bill only after the first issue has been served and the earliest bill date has been reached.

If the billing series has run out

I. If the order being billed is a future order:

   A. If an additional future order exists, QuickFill attempts to transfer money from that additional future order to the order being billed.

      1. If money was successfully transferred then matters are left to rest until the billing order becomes the active order, at which time QuickFill will serve the issues that were paid for.

      2. If no money could be transferred nothing more can be done since QuickFill can’t cancel the subscription because the current order is still active and paid for. Nothing more happens until the billing order becomes the active order.

II. If the order being billed is the current order:

   A. If a future order exists, QuickFill attempts to transfer money from that future order to the order being billed.

      If money was successfully transferred QuickFill checks to see if the order being billed now has enough money such that there are issues that were paid for that have yet to be served.

      1. If there are issues remaining to be served and there is still a balance due, the cancel at expiration flag is set so that the order will be expired and the future order activated when those issues have been served.

      2. If there are no more issues remaining to be served no more is done. The issue label update will expire the order and activate the future order.
Updates

Billing update

B. If no money could be transferred from a future order, and yet there is enough money to pay for some of the issues that have yet to be served:

1. If the remaining amount due is less than the publication’s minimum cancel amount:
   a. If there is a future order (and is not paid for either) then the cancel at expiration flag is set so that when the paid-for issues have been served then the current order will be expired and the future order will be activated.
   b. If there is no future order the amount due is written off in hopes that the subscriber will send in a paid renewal. The write-off may be delayed if the publication’s policy is to delay write-offs after sending cancel bills.

2. If the remaining amount due is greater than or equal to the publication’s minimum cancel amount then the cancel at expiration flag is set so that the order will be canceled when the paid-for issues have been served.

C. If no money could be transferred from a future order and no issues are owed:

1. If the money could not be transferred because the future order appeared to be a true renewal and not an incorrectly entered payment then the current order is canceled and the future order is activated.

2. If the amount due is less than the publication’s minimum cancel amount then the amount due is written off in the hopes that the subscriber will send in a paid renewal.

3. If the amount is greater than or equal to the publication’s minimum cancel amount:
   a. If at least one issue has been served and it is the publication’s policy to issue cancel bills for the issues received, then the order is canceled for nonpayment and a cancel bill is generated. The order will not be written off until the next billing update is run, or the number of days specified on the publication definition screen have elapsed.
   b. If no cancel bill is being sent, the order is canceled for nonpayment and the amount due is written off immediately.
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Billing update

If the billing order is in the middle of a billing series

- QuickFill tests the current date against the number you entered in the ‘Next’ field of the billing series to see if it is time for the next bill. If, for example, you’ve sent the third of five efforts in the series, and the ‘Next’ field for the third effort is 14, QuickFill produces the fourth bill only if at least 14 days have passed since it generated the third effort.

- If QuickFill produced a bill with this update, it tests to see if the order should be suspended for nonpayment.

An order is a candidate for suspension for nonpayment if

1. the subscription status is “active” or “graced” (it doesn’t make sense to suspend an order if the customer isn’t receiving issues);
2. the suspend point for the billing series has been reached; and
3. you’ve served all paid issues.

For example, say the suspend point for the billing series is 3, and the bill that QuickFill just produced was the third or greater effort in the series. So the suspend point has been reached. If the price for the subscription came to $120 for 12 issues and the customer paid only $40, QuickFill would bill him or her for the remaining $80. But QuickFill wouldn’t suspend the customer until he or she had received at least four issues.

If an active or a graced order is suspended for nonpayment, QuickFill checks to see if a future order with a payment exists. If so, it attempts to transfer money from the paid future order to the current order. If no money could be transferred because the paid future order appears to be a true renewal rather than an incorrectly entered payment then the current order is canceled and the future order is activated.
Updates

Issue labels update

**What it does**

The main purpose of the ‘Issue labels’ update is to produce the labels you’ll use to mail issues to subscribers. This update also produces labels for premiums, bills if you send bills with the first issue of a new order, and renewal notices and renewal labels if you use “by issues” renewal series. When using “by issues” renewal series, you also have the option of renewing subscriptions automatically and either sending the subscriber a bill for the renewal, or automatically charging the renewal to the credit card number in the prior order. If you want to send renewal notices more frequently than you send issues, you must use the “by days” renewal series and the ‘Renewal notices’ update. For example, if your publication is a quarterly and you want to send renewal notices with 30 days between each notice, then you must use the “by days” renewal series.

Running the ‘Issue labels’ update may also

- reactivate temporarily suspended subscriptions;
- cancel orders at expiration and write off amounts due;
- change the active order to expired and change a future order to active;
- set the status of an order to expired or graced; and
- write off small amounts due.

The “Current” pointer, which is set in the issue table in ‘Definitions’, governs what happens when you run the ‘Issue labels’ update. (You set this pointer for each publication.) The “Current” pointer lets QuickFill know the most recent issue available for mailing to subscribers. QuickFill produces labels for all issues up to and including the current issue.

You also set the “New orders” pointer in ‘Definitions’. QuickFill uses this pointer to determine the first issue for new orders. QuickFill automatically enters the “New orders” issue in the ‘Starting issue’ field when you enter a new order. If you want to start with back or future issues, you can override this default during order entry.

QuickFill places this starting issue for new orders in the ‘Next issue’ field of the order record. When you run the ‘Issue labels’ update, QuickFill supplies labels
Updates

Issue labels update

based on the value in this 'Next issue' field. All orders get labels for all issues, beginning with the issue in the 'Next issue' field and ending with the current issue.

Example: Say you last ran the ‘Issue labels’ update with both the “Current” and the “New orders” pointers set to the January 2006 issue. Now you change the “Current” pointer to the February 2006 issue. The next time you run the ‘Issue labels’ update, QuickFill will produce labels for every subscriber who is slated to receive the February 2006 issue. If you run this update again—but don’t change the “Current” pointer—QuickFill won’t produce any labels. The reason: All customers have been served the February 2006 issue.

Now, say you enter a batch of new orders and run the ‘Issue labels’ update. Since the “New orders” pointer is still set to January 2006, QuickFill produces labels for these new orders for both the January 2006 and the February 2006 issues. (For a more detailed description of the ‘Issue labels’ update, see this chapter, p. 9.28.)

When to run it

You can choose one of two main strategies for deciding when to run this update. If you prefer to mail all the copies for a particular issue at one time—and you’re not concerned with making smaller mailings to new subscribers between issues—run the update once for each issue.

For example, say you want to serve the January 2006 issue on January 1. You do this by setting the “Current” issue pointer to January 2006 and running the ‘Issue labels’ update on January 1. Now, you set the “New orders” pointer to the February 2006 issue. All new orders you enter during January will be started with the February 2006 issue and will receive their first issue when you run the ‘Issue labels’ update for February.

If you’d rather serve the first issue for new orders immediately and not wait for the next regular issue to come out, you can run the ‘Issue labels’ update as frequently as you want.

Here’s the advantage of having separate pointers for the current issue and for new orders: Suppose you have a monthly publication but like to mail the first issue to new subscribers on a daily basis. You’ll probably run the update that produces most of the labels for the next issue (March, say) before you actually have the issue in hand. (You need some time to get the labels to the mail house.) Now, you want to send the issue you have on hand (that is, February) to new subscribers, but your “Current” pointer is set to March. If there were only one issue pointer, you couldn’t send the February issue. However, with two issue pointers you simply leave the “New order” pointer set to February and the “Current” pointer set to March. New subscribers will receive both issues.
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Issue labels update

How to run it
Refer to the built-in help system for instructions on how to run the ‘Issue labels’ update.

What it produces
The ‘Issue labels’ update can produce the following:

- labels (these can include issue-only labels, premium with issue labels, or premium-only labels);
- presort files for use with postal presort software (see appendix E, *Postal presort and QuickFill Label Splitter*, p. E.2, for more information);
- bills for new subscribers that you can print from within QuickFill (see appendix C, *Sample forms*, p. C.3, for a sample bill);
- bills for new subscribers in a mail-merge file that you can use with the mail-merge facility of your word processor;
- renewal notices for “by issues” renewal series that you can print from within QuickFill (see appendix C, *Sample forms*, p. C.9, for a sample renewal notice);
- renewal notices for “by issues” renewal series that you can use with the mail-merge facility of your word processor;
- renewal labels for “by issues” renewal series;
- renewal orders from auto-renewal “by issues” renewal series;
- issue labels update report;
- label update batch report;
- renewal update report.

QuickFill produces the labels in up to 11 different files. Labels for premiums that are to be shipped separately from the issues are placed in a premium-only file. The issue labels themselves are placed in a single “standard” file and up to 99 “split” files. You specify which labels go in the split files on the issue label split table. (See chapter 8, *Definitions*, p. 8.23, for information on label split tables.)

Within each of these files QuickFill sorts the labels into groups according to these criteria:

1. Publication. If you run the ‘Issue labels’ update for more than one publication at a time, the labels for each publication are grouped together.
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Issue labels update

2. Billing form and package. If you're sending a bill with the first issue, then the labels that need to have a bill enclosed are grouped together.

3. Renewal form and package. If you're sending renewal notices and renewal labels with issues (that is, you’re using a “by issues” renewal series and have selected the ‘Withiss’ field), then the labels that need to have a renewal enclosed are grouped together.

4. Issue date. All of the labels for a given issue are grouped together. Even when you are running the main issue label update for a new issue you may get a handful of labels for back issues. These are for subscribers that renewed late or paid late or that specifically requested that their subscription start with a back issue. You control the production of back issue labels by setting the backstart policies on the publication definition screen and by setting the “Current” and “New order” issue pointers.

5. Premium. Issues that are to be mailed with a premium are grouped together by the premium code.

6. Split code. If you have split your labels out into special groups by using the issue label split table, then the labels for each split group are placed together. You might use split groups to place wrappers on the final few issues of expiring subscriptions, or to enclose acknowledgments with the first issue of new subscriptions, or for complimentary and gift orders or for specialized regional editions.

7. Service code. If you have subscriptions with different service codes (such as for CDs that accompany the issue, or for different levels of service such as fax or courier delivery), then the labels for each service code are placed together. If you do NOT want the labels to be sorted by service code, you can specify so on a label split table. (See chapter 8, Definitions, p. 8.23, for information on label split tables.)

8. Shipping class. All labels that are to be shipped by a given shipping method are grouped together.

9. Number of copies. If you elected to print a single label for multi-copy subscriptions, then the labels are grouped together according to the number of copies to be mailed.

Within each group the labels are sorted into country code and Zip+4 order. If you need to sort your labels using the periodical class or standard class presort methods then this can be accomplished in conjunction with postal presort software from third-party vendors. Call CWC Software for more information regarding postal presort packages that are compatible with QuickFill.
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Issue labels update

Note: sort order for renewals produced for “by issues” renewal series

Renewal notices and labels produced by the ‘Issue labels’ update are separated into those that are to be sent with issue and those that are to be sent separately. Renewals to be sent with issue are sorted to match the appropriate issue labels while renewals to be sent separately are sorted the same way as those produced for “by days” renewal series. (See p. 9.37 for more information on the sort order for renewals produced for “by days” renewal series.)

To create a postal presort data file instead of QuickFill labels, specify the smallest label group size that you wish to presort on the publication definition screen. Then, if any of the label groups is larger than the specified minimum, QuickFill will produce a postal presort file instead of a QuickFill printable label file. Postal presort files are placed in the mail-merge directory. For the exact location of your report files, go to the “About QuickFill” screen.

All of the criteria for these label groups can occur in any combination, so each group of labels is preceded by a header label that identifies the publication, premium, split code, run date (date the update was run), and so forth. At the end of the group QuickFill places a trailer label that shows the number of labels in the group. If you print the labels in the Cheshire format, each group is preceded by a blank page. In the pressure-sensitive label format each group starts on a new row of labels.

You can print the labels either by selecting ‘Print...’ under ‘File’ or ‘Reports’ on the main menu. When you print, you can specify whether you want to use pressure-sensitive or Cheshire labels. You can also click on “Label Groups” to use the ‘QuickFill Label Splitter’ to create dBASE files for any of your label groups. (See appendix E, Postal Presort & QuickFill Label Splitter, p. E.2, for more details.)

The premium-only labels are placed into a separate file so that you can, if you wish, print those labels on pressure-sensitive stock separately from the main bulk of the issue labels.

If you need to print any other group of labels separately, then you should use the issue label split table to place that group of labels into a separate file.

Update report QuickFill produces an update report for each publication selected. The update report will have one or two parts.

Error messages QuickFill produces this first part only if there are, in fact, errors to report. Refer to “Error messages” in the built-in help system’s index for a list of the possible error messages.

Label statistics The second part of the report gives you statistics on the labels you just produced.
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Issue labels update

1. Shipping report. This section reports the number of labels for each shipping class. The types of labels are broken out into “issue only,” “premium with issue” and “premium only.”

2. Status breakdown of the current issue only. This section shows the number of labels produced for each order status (active, active but cancel at expiration, or graced), broken down into complimentary, free, paid and unpaid. A complimentary subscription is a free subscription with an indefinite term—it continues until the publisher cancels it. A free subscription expires on a definite date. A paid subscription is a regular subscription that has been paid for. An unpaid subscription was requested but has not yet been paid for.

3. Service code breakdown (for all issues, including back issues). This section shows the number of labels produced for each type of service.

4. Label counts broken down by U.S., Canadian and foreign; by state; by Canadian province; by foreign country; and by U.S. sectional center. You choose which of these counts you want on the report by selecting ‘Preferences’ on the ‘Definitions’ menu (see chapter 8, Definitions, p. 8.71 for details).

5. Summary of label groups. QuickFill prints at the end of the ‘Issue labels’ update report a summary of all the label groups.

   Note: Periodical class zone and county and intra-SCF reports

If you mail your publication at periodical class postage rates and need to produce periodical class zone and county and intra-SCF reports, use the ‘QuickFill label splitter’ on the issue label files produced by the ‘Issue labels’ update. (Refer to appendix E, Postal Presort & QuickFill Label Splitter, for further details.)

Label update batch report

This is a batch report for all accounting transactions generated by the ‘Issue labels’ update. It will contain entries for:

1. amount due written off;
2. orders canceled at expiration;
3. rolling forward of credit balances or issues served to a future order;
4. single summary transaction for all issues served for the publication. This entry recognizes the income earned by serving the issue. Typically, it consists of a debit to deferred income and a credit to earned income;
5. auto-renewal information.

See this chapter, p. 9.34, for information about renewal related output.
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Issue labels update

Details of what it does

You don’t need to understand all the details of how the ‘Issue labels’ update works in order to use QuickFill successfully. Read this section only if you’re interested in a more detailed account of what the ‘Issue labels’ update actually does. Rest assured, you can safely skip this section if you like.

The ‘Issue labels’ update examines each subscription for the publications you selected. If the subscription status is “expired,” “suspended for nonpayment,” “suspended indefinitely,” or “canceled,” the update doesn’t process the subscription further.

The update examines subscriptions that are suspended temporarily to see if the current issue is greater than or equal to the “unsuspend” issue you specified. If so, it changes the status of these subscriptions to “active” and processes them just like any other active order.

The update may process a subscription more than once in the same run. The most common reason for reprocessing a subscription is to supply issue labels for back issues. The update processes each subscription until it no longer requires any labels. Then, the update goes on to the next subscription.

Steps in the ‘Issue labels’ update:

1. QuickFill decides whether the current order (the last nonfuture order in the subscription) needs an issue label, a bill, a renewal notice, a renewal label, or a premium label.

   The current order needs an issue label if

   - you still have issues—including grace issues—to serve for the order;
   - the next issue for the order is the “Current” issue for the publication, or it is an issue before the “Current” issue. (You need an issue label for an issue before the “Current” one to backstart a subscription or, sometimes, to reinstate a subscription.)

   The current order also needs a renewal notice if it meets all of the following conditions:

   - The order belongs to a ‘by issues’ renewal series.
   - The order is paid in full or the publication policy is set to renew unpaid orders.
   - The number of issues remaining in the order matches the number specified (in the ‘When’ field) for one of the renewal efforts in the renewal series definition.
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The current order needs a renewal label if it meets the three conditions above and is linked to a renewal series that uses a package with ‘Label only’ selected in the ‘Printed notice format’ field.

The active order needs a bill if it meets all of the following conditions:

- It is a new order and the first issue.
- You need to serve an issue to the order.
- When you entered the order, your publication or offer policy was to send a bill with the first issue.
- This is the first bill.
- This is a single-party non-agency subscription.
- The amount due for the order is greater than the minimum bill amount you specified on the publication definitions screen. (If all the other conditions are met but the amount due is less than the minimum for the publication, QuickFill won’t generate a bill. Instead, it will write off the amount.)
- The order is for one copy—or the order is for multiple copies and your publication’s policy is to send multiple copies together. (If you send multiple copies separately, it’s difficult to figure out which copy should contain the bill.)

The active order needs a label for a premium if you haven’t yet served the premium, and the order qualifies for the premium at this time.

2. If you’re serving a premium, QuickFill checks to see whether the premium should have a separate label or whether you’ll send the premium with the issue. Premiums get separate labels if you’re either not serving an issue at this time or if you specified in the offer that you didn’t want to send the premium with the issue.

3. QuickFill generates a file of pointers to orders that require issue or premium labels, bills, renewal notices, and renewal labels. (Later on QuickFill sorts these pointers into the proper order.)

4. QuickFill sets the “renewal series completed” flag for nonrenewed orders that are linked to a “by issues” renewal series, have received all renewal efforts in that series and the number of issues specified in the ‘Renewal series is complete __ issues after the final renewal notice’ field (of the “by issues” renewal series) have been served.

5. After producing the pointers, QuickFill checks to see if it is time to cancel the subscription. The update cancels the subscription if QuickFill has
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Issue labels update

previously set the cancel at expiration flag for the subscription and you’ve served all paid issues for this order.

If it is time to cancel, QuickFill takes the following steps:

- It adjusts the price and term of the order to reflect only the issues you served.
- It writes off any remaining amounts due.
- If QuickFill set the “cancel at expiration” flag when you performed a ‘Cancel’ transaction, the order status is set to “cancel at expiration.”
  If QuickFill set the “cancel at expiration” flag during the ‘Renewal notices’ update (when the renewal series was finished) or during the billing update (when an order was removed for nonpayment), the status is set to “expired.”
- It sets the status to “cancel at expiration” for all future orders that have no payments.
- It makes the first future order that has a partial payment the new active order.

6. Next, QuickFill checks to see if it should consider expiring an order. The update considers expiring the order if

- the update didn’t cancel the order in the step above; and
- you have no remaining issues to serve for the order, including any grace issues allowed by your publication’s policy or renewal series definition; or
- The “renewal series completed” flag has been set for an order that is linked to a “by issues” renewal series. This means that the order has received all renewal efforts in that series and the number of issues specified in the ‘Renewal series is complete __ issues after the final renewal notice’ field in the “by issues” renewal series have been served; or
- The deferred income cash for the order is equal to $0.00 (the customer has been served all issues that he or she paid for) and the order has reached the end of the renewal series. The ‘Issue labels’ update expires orders that meet this criterion regardless of the number of issues remaining in the subscription.

7. If it is time to expire the order and a future order exists, QuickFill sets the status of the current order to “expired” and makes the future order “active” (as long as it hasn’t canceled the future order).

- If it has canceled all future orders, QuickFill sets the status for the current order and for all future orders to “expired.”

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8. If it is time to expire an order, but no future order exists,
   - QuickFill sets the status to “expired” if you’ve served the last grace issue for that order or if the “renewal series completed” flag has been set.
   - If you haven’t served the last grace issue, QuickFill sets the status to “graced.”

9. Finally, QuickFill checks to see if any future orders need a premium.

After it has examined all the subscriptions, QuickFill sorts the pointer file, then uses it to produce the actual labels, bills, renewal notices, and renewal labels.

Running the ‘Issue labels’ update in the audit system

You run the ‘Issue labels’ update for an audited publication exactly as you would for a nonaudited publication. Refer to the built-in help system for instructions on how to run the update.

For an audited publication the ‘Issue labels’ update automatically reclassifies qualified subscribers who are more than three years old. For ABC or BPA-audited business publications they are changed to “Nonqualified other”. For VAC-audited publications they are changed to “Non-paid association”. ABC audited magazines have slightly more relaxed rules: only verified individual request subscriptions (VI with request type INR), and NPI (non-paid individual), NPL (non-paid list source), NPA (non-paid association) and NPM (non-paid club membership) subscriptions are subject to reclassification under the three year rule.

Note: reclassification of qualified subscribers

QuickFill determines the qualification age of a subscriber based on the difference between the calendar date of the current issue and the subscriber’s qualification date. See chapter 4, Audit system basics, p. 4.4, for more information on the qualification date.

The labels produced by the ‘Issue labels’ update for an audited publication are the same as for a nonaudited publication with one exception. Even if you choose to include the expiration date on the publication definition issue labels tab, the labels for controlled subscriptions do not include the expiration date because you don’t want controlled subscribers to know when their subscription expires. If subscribers know that a subscription won’t expire for another two years, they are less likely to respond to your requalification efforts.

Audit issue galley data file

In addition to producing labels and reclassifying subscribers more than three years old, the ‘Issue labels’ update also produces a galley data file for each audit issue. The galley file’s name is made up of the database name, publication code, and issue number. For example, if your audit issue for publication code WIDGET in the standard QuickFill database (that is the...
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Issue labels update

database files are named QFWDB*.QFDAT) was issue #144, the galley data file would be named QFWDB_WIDGET_0144.QFDAT.

The galley data file is located in the database directory. This file should not be deleted. If it is, you will not be able to run the ‘Audit issue galley’ report for the issue associated with the file; this file makes it possible for a test selection to be created for your auditor.

QuickFill does allow you to generate a galley file in case of loss or damage to the original file, but it is always best to work with the original. Any changes in the database since the audit issue was run may be reflected in the reconstructed galley data file. In the event that the galley data file is lost or damaged, you should first back up your current database, then restore your database and galley data file back to a point before the galley data file was deleted or damaged.

The ‘Issue labels’ update also uses the “last update” date and time in the issue table to ensure that the audit issue galley data file matches the database. If you serve additional copies for an audit issue after the initial update, the ‘Issue labels’ update scans the galley data file to make certain that the number of copies reported therein matches the number of copies reported in the issue table.

QuickFill will automatically resynchronize and truncate the galley data file if the ‘Issue labels’ update fails and you restore your database, but do not restore the galley data file. (This assures that the contents of the galley data file return to what they were before the failed update.)

The numbers in the galley data file should always match the numbers in the issue table. If they do not, when the ‘Issue labels’ update is run, no labels will be produced and the label update report will contain a message to the effect that the galley data file does not match the database. The following situations could cause this to happen: the galley data file has been altered or deleted; the galley data file was created from a prior version of QuickFill and was not updated to the version you are currently running; you restored your database and for some reason only a partial restore was done or you restored from a bad backup; your database is corrupt; or there is a bug in QuickFill. In the event that the galley data file does not match the database, call technical support for instructions.

See chapter 4, Audit system basics, p. 4.16, for information on audit system procedures.
Renewal notices update

What it does

The ‘Renewal notices’ update generates renewal notices and renewal labels for “by days” renewal series according to the schedule that you set up when you defined your “by days” renewal series. When the number of remaining issues in a subscription reaches the point specified in the renewal series, the first notice or renewal label is generated. From that point on, additional notices are generated at the intervals specified in the renewal series until the subscription is renewed, canceled, or the last effort in the series has been sent.

In most cases you will want to set up your renewal series so that notices will continue to be sent after the final issue of the subscription has been served. However, that is not a requirement. If the last effort of the renewal series is sent before the subscription expires, it will be marked so that it will expire on the last issue. No grace issues will be sent in that case.

You also have the option of renewing the subscription automatically and either sending the subscriber a bill for the renewal, or automatically charging the renewal to the credit card number used in the prior order.

Note: renewal notices and renewal labels for “by issues” renewal series

The renewal notices and renewal labels for “by issues” renewal series are produced by the ‘Issue labels’ update.

Note: blanket renewals

If you want to generate renewal notices for subscribers even if they are not due for renewal, use the ‘Blanket renewals’ report or the ‘Gift blanket renewals’ report (for gift or group subscriptions). For example, you can use blanket renewals to send a special renewal offer at Christmas time or before a price increase. You can also use this report to send notices that look like renewals to prospects. (Refer to the built-in help system for details on the ‘Blanket renewals’ report.)

For a more detailed description of the ‘Renewal notices’ update, see this chapter, p. 9.39
Updates

Renewal notices update

When to run it

You can run the ‘Renewal notices’ update either once a month or more or less frequently. Each strategy has its pluses and minuses.

If you run the ‘Renewal notices’ update monthly, you’ll produce a larger number of notices with each run. Doing so may be more convenient than producing smaller groups of notices more frequently, especially if you use a mailing house to mail the notices. If you decide to run renewals monthly, set the number of days between efforts in your renewal series to a relatively low number, such as 21. This will ensure that QuickFill produces a notice for each order that is up for renewal on each monthly run.

If you choose to run the ‘Renewal notices’ update more frequently (weekly is probably a good schedule), you’ll produce fewer notices on each run. Getting fewer notices is more convenient if you have a relatively low volume of renewal orders and don’t use a mail house. If you decide to run the ‘Renewal notices’ update more frequently than once a month, set the days between efforts in your renewal series to the actual number of days you want between efforts. In this way, QuickFill will generate renewal notices on the next run, after the correct number of days has elapsed.

Another advantage of running this update more frequently is that you have greater control over the time that elapses between successive notices. For example, you could allow six weeks to elapse between the first and second notices and four weeks to elapse between the next notices in your series.

Note: sending renewals based on issues remaining in a subscription

If you want the production of renewals to always be in sync with the number of issues remaining in a subscription, you should use “by issues” renewal series.

How to run it

Refer to the built-in help system for instructions on how to run the ‘Renewal notices’ update.

What it produces

The ‘Renewal notices’ update can produce the following:

- renewal notices that you can print using the simple or detailed layout (see appendix C, Sample forms, p. C.9, for a sample simple renewal notice and C.18 for a sample detailed renewal notice);
- mail-merge files you can use with the mail-merge facility of your word processor;
- renewal labels that you can print or convert to dBase files;
- renewal orders from auto-renewal series;

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Renewal notices update

- renewal update report;
- renewal batch report.

Renewal notices The following describes the data the renewal notices contain and tells you how you can control what actually appears on the renewal notices. (Refer to “Definitions,” “Renewal,” “Simple renewal” in the table of contents for the help system for a complete renewal layout.)

- Address. The customer to whom the notices are addressed depends on the type of subscription and on the ‘Who’ field in the renewal series definition.

  For single-party subscriptions, the notices are addressed to the subscriber, unless the order came through an agency. In this case, the notices are addressed to either the agency or the subscriber based on the renewal series definition.

  For nonagency two-party and group subscriptions, the notices can go either to the ship-to customer or the bill-to customer. If you do not select the ‘Send to ship-to’ field, the update produces a renewal notice for the bill-to customer. If you select the ‘Send to ship-to’ field, the update produces a renewal notice for each ship-to customer. (If the notices go to the ship-to of a group subscription, each ship-to receives a notice only for the copies he or she is receiving.) Refer to the built-in help system for details on renewal series and specifying to whom a renewal notice should go.

  For agency two-party and group subscriptions, the notices can go either to the agency or the subscriber. If you set the renewal series to send renewal notices for agency subscriptions to the subscriber, the notice will go to the bill-to if the ‘Send to ship-to’ field (on the renewal series definition) is not selected otherwise to the ship-to.

  If you set the renewals series to send notices for agency subscriptions to the agency, the agency will receive either one notice per group or several depending on the ‘Send to ship-to’ field (on the renewal series definition). If this field is not selected, the agency will receive one renewal notice per group. If it is selected, the agency will receive several renewal notices per group; there will be one notice for each ship-to in the group.

- Offer. QuickFill prints all the offers you linked to a particular renewal effort on the renewal notice—unless the number of issues in the offer equals zero. (You use the zero issue offer for special per-issue pricing. Refer to “Offers” and the ‘Number of issues’ field in the built-in help system for details on per issue pricing.)

  QuickFill prints first and in full detail—that is, with separate lines for price, shipping, and tax—the first offer that most closely matches the quantity of the order you’re renewing. (So if the order you’re renewing was for 6
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Renewal notices update

copies, and the renewal effort contained offers for minimum quantities of 2, 5, and 10 copies with one- or two-year terms, the one-year/five-copy offer prints first on the renewal notice.) The order of the offers on the renewal effort is important. If you want to encourage two-year renewals, then list the two-year offer before the one-year offer. After the detailed offer, QuickFill prints the remaining offers in summary form—that is, it doesn’t spell out all the pricing details. (For all subscriptions other than groups, the price you see for these other offers includes shipping and tax. For group renewals, the price excludes shipping and tax. Because tax and shipping may vary from ship-to to ship-to, this makes it easier for the customer to calculate the cost of adding or dropping members from the group.) QuickFill prints the remaining offers in the order you entered them on the renewal effort screen.

For group orders the summary offers are based on the country of the first member of the group. If you expect to have group members in more than one country, and want to use more than one renewal offer, then you should use the same price for all countries (but note that you can adjust the total price by using different shipping charges based on the country).

If the order comes from an agency and the agency is being sent the notice, QuickFill reduces the price by the amount of the agency discount.

- Company name and address. Whether or not your company name is printed on the renewal notice depends on the choice you made in the ‘Print company name on renewals?’ field of the company definition screen.

- Credit card block. QuickFill prints credit card information only if you selected the ‘Print credit card info block on notice?’ field of the renewal notice package screen. You can use different renewal packages for each effort in a renewal series, so you can allow credit card payments on some of the efforts in the series and not on others.

- Order number. The renewal notices always contain the order number. After the order number, you’ll see a dash followed by an ‘R’ and the effort number that produced the renewal notice. If, for example, the order number is 5678 and the renewal effort is 3, QuickFill prints 5678-R3 on the notice.

- Messages. QuickFill centers the first four-line message block at the top of the lower half of the renewal notice form. It prints the second four-line message block in the lower left-hand corner of the form. The text of the messages comes from the entries you made in the renewal series definition screen (see appendix C, Sample forms, p. C.9, for a complete renewal notice layout).
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Renewal notices update

- Expiration date. The expiration date is the expiration date of the order you're renewing.

- Payment instructions. QuickFill prints the phrase “Check payable to:” only if you filled in the ‘Checks payable to’ field in the publication definition screen (see chapter 8, Definitions, p. 8.37, for details). For notices being sent to Canada and the U.K. the spelling of “check” is changed to “cheque.”

- Federal tax ID number. QuickFill prints the federal tax ID number only if you entered your federal tax ID number in the company definition screen.

- Publication name. QuickFill prints the publication name on the top and bottom portions of renewal notices only if you selected the ‘Print publication name on the top half of notice’ and the ‘On bottom half of notice’ fields on the “Defining renewal series” screen.

- Document descriptors. QuickFill also prints document descriptors (such as “SUBSCRIPTION RENEWAL,” “Please return this portion.” and “FOR YOUR RECORDS”) on renewal notices. The text of the document descriptors comes from the entries you made in the ‘Document descriptors’ fields on the “Defining renewal series” screen.

Customized renewals

As described above QuickFill gives you quite a lot of control over the content of the notice. But if you want to customize the layout of the notice then you have two choices.

1. Modify the layout of the standard renewal notice by using the QuickFill Form Designer. (See chapter 14, Printing, p. 14.8, for more information on the QuickFill Form Designer.)

2. Produce mail-merge files instead of standard renewal notices. These files can be processed by the mail-merge feature of Microsoft Word or any other word processor. There are four different mail-merge file layouts available known as MMERG1 through MMERG4, all of which can be produced in either dBASE or delimited format. We supply sample mail-merge document templates for the MMERG4 file layout and Microsoft Word. By editing this template you can change the layout of the renewal notice as you desire.

Please note that this option is not available for gift renewals and group subscriptions that require a complete list of the recipients. The reason for this restriction is that renewal notices with a variable number of ship-to addresses cannot be represented in any file format that a word processor can handle.

Refer to “Updates menu,” “Renewal notices update,” “Custom renewals” in the table of contents for the built-in help system for more information on mail-merge renewal notices.
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Renewal notices update

Renewal labels  If you use renewal forms that have all of the offer details pre-printed on them then you might need just the mailing address for the renewal notice. In that case you should choose to create renewal labels instead of renewal notices. You make this choice on the renewal package definition screen.

The top line of each renewal label contains the order number you are trying to renew and the effort number for which the label was produced. Renewal labels are sorted and produced (for ship-tos or bill-tos) just like renewal notices.

Once your renewal labels have been generated, you can either print them from the ‘Labels’ tab of the ‘Print saved reports’ screen or you can use the ‘QuickFill Label Splitter’ to create a dBASE formatted file for your renewal labels. (See appendix E, Postal presort and QuickFill Label Splitter, p. E.2, for more information.)

Sort sequence  QuickFill sorts the renewal notices in the following order:

1. publication,
2. renewal form (from the ‘Form set code’ in the renewal package definition),
3. renewal package,
4. number of pages (for detailed renewals only),
5. country,
6. zip code.

If the notice goes to an agency, QuickFill uses a dummy country code (ZZZZ) and the agency code instead of the zip code. As a result, QuickFill prints agency notices after all the other notices, then groups them together by agency.

Renewal update report  The ‘Renewal notices’ update produces an update report for each publication for which it generates notices. The update report has five sections.

- Error messages. QuickFill produces this section only if there are, in fact, errors to report. Refer to “Error messages” in the built-in help system’s index for a list of the possible error messages.

- Renewal notice report by effort number. This section reports the total number of renewals generated for each effort in a renewal series.

- Renewal notice statistics. QuickFill only produces this section if you have selected the ‘Include counts by’ fields on the “System preferences” definition screen. This section breaks down the number of renewal notices produced by U.S., Canadian, and foreign: by state; by Canadian province; and by foreign country. You choose which of these counts you want on the report by selecting ‘Preferences’ on the ‘Definitions’ menu. See chapter 8, Definitions, p. 8.71, for details.
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- Automatic renewal report. This section lists the number of renewal orders created, the total dollar value, and total amount of the credit card charges.

- Renewal notice report by package. This section reports the number of renewal notices generated broken down by the package code and publication.

- Mail-merge renewal notice directory. This section lists any mail-merge renewal notice files QuickFill produced. It shows the file name, the format code, the publication, and the form type you require to print the notice.

Details of what it does

You don’t need to understand all the details of how the ‘Renewal notices’ update works in order to use QuickFill successfully. Read this section only if you’re interested in a more detailed account of what the ‘Renewal notices’ update actually does. Rest assured, you can safely skip this section if you like.

The ‘Renewal notices’ update examines every subscription to the publication(s) you selected. If it sees any of the following conditions, it doesn’t process the subscription further.

1. QuickFill already set the “cancel at expiration” flag.
2. The subscription is complimentary.
3. The last order in the subscription is linked to a “by issues” renewal series.
4. You haven’t served any issues for the last order in the subscription.
5. The status of the last order in the subscription is “suspend” or “cancel.”
6. Your publication policy is not to renew unpaid subscriptions, and the last order in the subscription has a balance due.

If none of these conditions exists, QuickFill processes the subscription. The action QuickFill takes depends on the renewal series you linked to the last order—that is, the renewal order—in the subscription.

If the renewal series for the renewal order has not yet started:

- QuickFill generates the first renewal notice or renewal label if (1) the number of issues remaining is equal to the number you specified in the renewal series and (2) at least the number of days you specified in the renewal series has elapsed since you served the last issue.

- QuickFill also generates the first renewal notice or renewal label if the number of issues remaining is less than the number you specified in the renewal series.

If the renewal series has already begun for that order:

- QuickFill tests the current date against the number you entered in the ‘Next’ field of the renewal series to see if it is time for the next renewal notice or renewal label. If, for example, you’ve sent the third of five efforts
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Renewal notices update

in the series, and the ‘Next’ field for the third effort is 14, QuickFill produces the fourth notice or label only if at least 14 days have passed since it generated the third effort.

- QuickFill does not generate a renewal notice or renewal label if the renewal series is finished and at least the number of days you specified for ‘Next’ in the final effort has elapsed. In this case, running the update sets the “cancel at expiration” flag for the subscription. QuickFill will then cancel that subscription as soon as you’ve served all the remaining issues.

If the renewal series is an auto-renewal series:

- If the renewal series that an order is linked to is designated as an auto-renewal series, then QuickFill will create a renewal order instead of a renewal notice or renewal label. This will occur when it is time to send the first notice or renewal label.

- The offer selected for the auto-renewal is the offer in the first renewal effort that most closely matches the term, quantity, and service code of the order that is being renewed. This is the same offer that would have been printed in detail on the renewal notice if this was not an auto-renewal series.

- Most fields from the order being renewed are carried forward into the newly created order, including the quantity, shipping class, purchase order number, and the subscription agency (and discount if applicable). The renewal channel is set to “AUTORN”. The last renewal effort number and the notice responded to are not changed in the order being renewed.

- The credit card number and expiration date are carried forward only if you have so specified when defining the renewal series. Note that the card may have expired. The next time you run the ‘Credit card charges’ update you will get credit card charge files containing credit card charge information for these orders.

- Groups and two-party subscriptions can also be auto-renewed by this mechanism.
Credit card charges update

What it does

The ‘Credit card charges’ update examines all the subscriptions for the publications you specify and creates a file from which you transmit credit card charge information to your bank or credit card company. It searches for orders that have credit card charges you’ve not yet processed (e.g. they have an “unprocessed credit card amount” field that is nonzero). When it’s done, the update sets the unprocessed credit card amounts to zero and replaces the CVV2 code (if applicable) with asterisks for those orders. You then transmit your file to your bank or credit card company.

Credit card companies generally require that charges for Internet orders be processed through a separate account than the one used for mail or phone orders. If you accept orders via the Internet and have flagged these orders with credit card payment type codes (e.g. “VI” for Visa Internet orders) the update will split the charges into two files, one for regular mail or phone orders and the other for Internet orders.

When to run it

You need to run this update only if you’re accepting credit card payments. You can run it as often as seems appropriate for your credit card volume. If you run the update and there are no unprocessed credit card payments then no harm is done; it will simply produce no output.

Warning - do not store the credit card charge files any longer than you have to

The credit card charge files produced by this update include credit card numbers and their associated customer names in plain text. This is unavoidable since the credit card processors that read these files do not allow for encrypted card numbers. For this reason you should delete the files as soon as you know that they have been accepted by the credit card processor. If you fail to do this, a thief who stole your computer could easily use the files to obtain handy lists of card numbers and names. Not only that, he would know that the card numbers had been recently used and were therefore likely to still be valid.
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Credit card charges update

<table>
<thead>
<tr>
<th>How to run it</th>
<th>Refer to the built-in help system for instructions on how to run the ‘Credit card charges’ update</th>
</tr>
</thead>
<tbody>
<tr>
<td>What it produces</td>
<td>QuickFill produces credit card charge files for use with a number of credit card processing packages. (Refer to the built-in help system for a complete list of the computer readable credit card output formats.) These format options allow credit card payments to be submitted electronically. If you are using a processing package that is not currently supported by QuickFill, please contact CWC Software's Technical Support.</td>
</tr>
<tr>
<td>Credit card update report</td>
<td>QuickFill produces a report for each publication you selected. The report lists the number of charges the update processed and the total dollar amount for each type of credit card.</td>
</tr>
</tbody>
</table>
Refunds update

The difference between the ‘Refunds’ update and the ‘Refund preview’ report

The ‘Refund preview’ report shows you what refunds would be automatically issued if you were to run the ‘Refunds’ update. Therefore, you run the ‘Refund preview’ report to check the validity of your refunds before running the actual refund update. (Refer to the built-in help system for more information on the ‘Refund preview’ report.)

The filters for the ‘Refunds’ update and the ‘Refund preview’ report look exactly the same.

What it does

The ‘Refunds’ update produces a list of subscriptions that are to receive refunds. It also changes each subscription’s order record to show that a refund has been issued.

It’s important to understand the difference between the refund transaction, the refund preview, and the refund update.

When you select ‘Refund’ under ‘Transactions’ on the main menu, QuickFill simply records the fact that you should refund a portion of an order’s total payments to the customer. That is, it increases the amounts in both the ‘Refund’ field and the ‘Refund due’ field of the customer’s order record by the amount of the refund. It also increases the amount due for the order by the same amount.

The ‘Refund preview’, which you select under ‘Reports’ on the main menu, lists all orders that have a nonzero amount in the ‘Refund due’ field. This preview serves two purposes. First, you can see whether you have enough potential refunds to warrant writing refund checks or issuing charge card credit vouchers. Second, you can look at each subscription to verify that the refund is correct before you actually issue it.

The ‘Refunds’ update lists the same orders as the ‘Refund preview’—that is, all orders that have a nonzero amount in the ‘Refund due’ field. But it goes further than the ‘Refund preview’. It also places zeros in the ‘Refund due’ fields. The update doesn’t write your refund checks or create charge card
Updates

Refunds update

credit vouchers. You use the information on the report to create these checks or vouchers.

When to run it
You can run the ‘Refunds’ update as often as you think necessary.

How to run it
Refer to the built-in help system for instructions on how to run the ‘Refunds’ update

What it produces
QuickFill produces a refund update report for all subscriptions for which at least one of the following is true:

1. The subscription has an order with an unprocessed refund amount.
2. Your publication policy is to refund a credit balance automatically, and the subscription has an order with a credit balance greater than the minimum refund amount.

QuickFill sorts the data in the refund report by:

1. publication;
2. payment type—check, Visa, and so forth—of the last order that had a payment;
3. bill-to customer’s country code;
4. bill-to customer’s zip code.
5. company;
6. individual’s last name, and
7. first line of street address.

The refund update report lists all orders for the subscriptions it selects. It shows the following information for each order:

1. order number;
2. order date;
3. last payment date;
4. credit card number and expiration date;
5. balance due before any write-offs;
6. all write-offs, and
7. all refunds to date—including all refunds processed on this update run.

The report also lists the following if it is relevant to the order:

1. The word “AUTO” next to the ‘Refund due now’ field. If you see “AUTO,” you’ll know that QuickFill automatically refunded a credit balance greater than the minimum refund amount you specified for the publication. (See chapter 8, Definitions, p. 8.43, for details on the automatically refunding ovrepayments.)
2. The agency code and name, if the order came from an agency.

3. The payment type, if it differed from the payment type for the last order that had a payment. This means you can identify credit card payments, even though the customer made a more recent payment for a subsequent order. Identifying credit card payments is useful, because you may want to issue a charge card credit voucher rather than a check. If the customer made more than one payment of different types on the same order, you cannot distinguish the type of the earlier payment on this report. You have to look at the subscription history for the customer by using 'Lookup' under 'Transactions' on the main menu.

4. The unprocessed credit card amount if an unprocessed credit card amount also exists for the order. You can reverse the credit card payment (by selecting 'Bounced payment' under 'Transactions' on the main menu) rather than issue a refund check. (If you do this, you should also add a comment to the subscription history, indicating that you used the transaction to fix an error; you didn’t use it because the bank refused the credit card payment.)

*Remember:* The report lists all orders for a subscription—not just those with a refund due. Why? Maybe, for example, an overpayment in one order should not result in a refund. Instead, you should transfer the amount to a previous order, where an underpayment had previously been written off.
Updates

Trial subscriptions update

Trial subscriptions updates

The ‘Trial subscriptions’ updates are used to manage single copy trial subscriptions. The ‘Make trial subscriptions’ update, selected from the ‘Trial subscriptions’ submenu under ‘Updates’, is used to create single copy subscriptions for existing customers and prospects in your database. The ‘Cancel trial subscriptions’ update, selected from the ‘Trial subscriptions’ submenu under ‘Updates’, is used to cancel single, zero priced (not including tax or shipping and handling), zero paid, non-renewed, single-copy subscriptions. In addition, subscriptions must have a status of active (A), graced (G), suspended indefinitely (SI), or suspended temporarily (ST) and meet the criteria specified on the filter in order to be canceled. Subscriptions canceled by the ‘Cancel trial subscriptions’ update will be given a status of canceled by publisher (CP).

Note: ‘Trial subscriptions’ updates and audited publications

If you are using the audit system and want to create or cancel nonpaid (controlled) subscriptions for an audited publication, you should use the ‘Make subscriptions’ update or ‘Cancel subscriptions’ update instead. See p. 9.47 for more information on the ‘Controlled subscriptions’ updates.

Refer to the built-in help system for details on the ‘Trial subscriptions’ updates.
QuickFill’s audit system contains two updates, ‘Make subscriptions’ and ‘Cancel subscriptions’, that can be used to manage controlled subscriptions. The ‘Make subscriptions’ update, selected from the ‘Controlled subs’ submenu under ‘Updates’, is used to create controlled subscriptions for prospects or to reactivate expired subscribers (that is, to create controlled requalifications for expired subscribers). The ‘Cancel subscriptions’ update, selected from the ‘Controlled subs’ submenu under ‘Updates’, is used to perform mass cancellations of nonpaid subscriptions. When a subscription is canceled by the ‘Cancel subscriptions’ update, it is given a status of “Canceled by publisher” (“CP”). We recommend that you run the ‘Qualified circulation’ report prior to running the controlled subscriptions updates so that you can determine the impact that they will have.

Refer to the built-in help system for details on the filters for the ‘Make controlled subscriptions’ update and the ‘Cancel controlled subscriptions’ update.
Updates

Merge duplicates update

Merge duplicates update

Use the ‘Merge duplicates’ update to search for and merge duplicate customer records. The update scans your database in match code sequence. The criteria used are the same as those described for the ‘Address matching’ screen. (See chapter 8, Definitions, p. 8.59, for details on the ‘Address matching’ screen.) Customers with a score high enough to be considered an “exact” match may automatically be merged. Customers recognized as “near” matches are displayed for you to examine and to decide what course of action should be taken.

Refer to the built-in help system for details on the ‘Merge duplicates’ update filter.
Purge updates

You use the purge updates to delete customer and subscription data from the QuickFill database. This will not cause your database files to get any smaller, but it will make space available for new records so that the files won’t grow as fast as they would have otherwise.

When deciding whether to purge data, it helps to know where the various types of records are stored so that you can determine what space will be made available by the purge.

Customer records are stored in database file 1. Every customer has at least one subscription and/or prospect record attached. Customers who are both subscribers and prospects are not deleted until both the subscription and the prospect record are purged. Similarly, customers who subscribe to multiple publications are not deleted until all of their subscriptions are purged.

Subscription records are stored in database file 2. Entering a new order results in the creation of a subscription record—entering a renewal order does not.

Order records are also stored in database file 2. Every order you enter, new or renewal, results in the creation of an order record. After all the issues in an order have been served, it is marked as expired and is then a candidate for being purged.

Subscription history records are stored in database file 3. These contain the narrative description of every transaction that was applied to a subscription, including orders, payments, address changes, and adjustments. The subscription history records are displayed on the lookup screen but are not used by any of the reports.

Prospect records are stored in database file 7. These records link a customer name to a list code. They are created when you enter a prospect name using the ‘Prospects’ transaction and when you convert expired subscribers to prospects using the expired subscription purge.

There are four types of purge updates:

- The ‘Purge expired subscriptions’ update deletes subscriptions that have expired, making space available in database files 2, 3, and possibly 1. (You may not make any space in file 1 if the customers have other subscription
Updates

Purge updates

and/or prospect records.) You have a choice of deleting the customer records for the expired subscriptions or converting them to prospects. If you convert them to prospects, you won’t make any new space available in database file 1 and database file 7 will grow a little.

Note: If you are using the audit system, you cannot purge subscriptions to audited publications that expired less than two years ago.

• The ‘Purge history orders’ update deletes order records that are no longer active but does not delete subscription or customer records. In addition, it does not delete the last (or current) order in a subscription. The ‘Purge history orders’ update makes space available in database file 2 only.

• The ‘Purge subscription history’ update makes space available in database file 3 only. You have the option of selecting which types of transactions you want to purge—for example, you can purge the subscription history records for address changes only.

• The ‘Purge prospects’ update deletes prospect records and customer records, making space available in database file 7 and possibly database file 1. (You may not make any space in file 1 if the customers have other subscription and/or prospect records.)

In general, when you purge expired subscriptions or history orders, you will no longer be able to get accurate ‘Payment rate’ and ‘Renewal rate’ reports for the period being purged. If you purge all the subscriptions that expired in 2004 and then run a ‘Renewal rate’ report on subscriptions that expired or were renewed in 2004, your renewal rate will appear to be 100%!

In addition, when you purge expired subscriptions, the ‘Adds and drops by issue’ report will no longer be accurate when run for issues served during the period being purged.

For this reason you should always make an archival copy of your database before running a purge. If you ever need to run a report that involves the purged data, then you can temporarily restore the old database, run the report, and then restore the current database.

All of the purge updates can be scheduled to run overnight, which is helpful if you have a large database or if you wish to purge expired subscriptions from several publications.

One-shot labels update

One-shot labels are created by looking up the customer for whom you would like to create the label and then selecting ‘Make label’ from the ‘Transactions’ menu or by clicking on the ‘Make label’ icon on the toolbar. One-shot labels are not printed immediately but are accumulated in a list that you may print at your convenience.

When you select ‘One-shot labels’ from the ‘Updates’ menu, you will see a screen that lists the customers for whom you have created a one-shot label. This list will not be cleared until the update is run.

*Hint: Scheduling one-shot labels to run later*

You can schedule the printing of one-shot labels to be run later even if there are no labels waiting to be printed. This lets you schedule the printing of the labels at any time during the day. When you run the scheduled updates, any labels that have accumulated will be processed.

You may also use this screen to change the text on the top line of a label before it is printed.

Refer to the built-in help system for more information on the ‘One-shot labels’ update filter.
Change series updates

The ‘Change series’ updates let you switch a group of orders from one billing series or renewal series to another. Why would you want to? You might want to test a new billing or renewal series against the one you’ve been using. Or you might want to set up a series for a special group of subscribers, such as short-term trials or very-long-term subscribers.

The ‘Change series’ updates differ in how they change orders in a subscription. The ‘Change billing series’ update changes the billing series for the billing order forward. (If a subscription does not contain a billing order, the ‘Change billing series’ update changes the most recent order even though it does not have an amount due. See chapter 7, Transactions, p. 7.10, for more information on order types.) The ‘Change renewal series’ update changes the renewal series of only the most recent order in the subscription. (You have already renewed the other orders.)

Note: As with any update, you should back up your database prior to using ‘Change billing series’ or ‘Change renewal series’.

To run these updates, select ‘Billing series’ or ‘Renewal series’ from the ‘Change series’ submenu of the ‘Updates’ menu and fill in the fields on the filter. (Your entries on the filters pinpoint for QuickFill which subscribers you want to change.) You can change billing or renewal series for subscribers based on various subscription-, order-, and/or customer-related criteria.

Refer to the built-in help system for details on the filters for the ‘Change billing series’ and ‘Change renewal series’ updates.
The ‘Update addresses’ menu item provides the ability to manipulate the name and address fields as well as the tax jurisdiction of customers’ records. Addresses can be changed to be all upper case or upper-and-lower case, the ‘Sex’ field can be set based on prefix and first name, the ‘Prefix’ field can be set based on the ‘Sex’ field, and/or the ‘Tax Juris’ field can be set based on the ‘Tax jurisdictions’ table.

Refer to the built-in help system for details on the filter for the ‘Update addresses’ update.
Fix orders

The ‘Fix orders’ update to make mass changes to order records. Possible applications include:

- Fixing the price, term, tracking code or other characteristics of orders that were entered with the wrong codes.
- Fixing new orders that were mistakenly entered with the wrong start issue.
- Removing orders and subscriptions that were imported incorrectly.
- Extending and reactivating subscriptions that have expired.
- Changing the billing or renewal policies for orders that were entered with the wrong codes.
- Changing the classification or request type of orders (audit system only).
- Removing the credit card numbers from orders where the payment process has been completed.

Warning: use the ‘Fix orders’ update cautiously

The ‘Fix Orders’ update is a very powerful tool that can save you a lot of time and effort. It can also be a very dangerous tool. It is easy to make changes to orders that you did not intend to make. So please, test your changes carefully before committing them. Do a test run first, using the ‘Test run only, no changes will be made’ check box, to verify that the number of orders changed matches your expectations. Also spot check the list of orders changed to verify that those are indeed the orders that you wanted to change.

Refer to the built-in help system for details on the filter for the ‘Fix orders’ update.
Running updates

After you have filled out the filter screen for an update, click on “OK,” and the screen below will appear:

![QuickFill for Windows screen](image)

**Note: updates on multiuser systems**

On multiuser systems it is recommended that updates be run as part of a job list. When you select ‘Run it now exclusively’, only the user on the workstation running the update can be in the database. In addition, that workstation cannot have any other QuickFill screens open while the update is running. When you select ‘Run it now shared’ the workstation running the update as well as other workstations are permitted to continue to enter transactions, which implies that QuickFill must lock each subscription before it updates it. To view the IDs of stations that are currently running QuickFill in the normal mode, go to the “About QuickFill” screen. When you run an update as part of a job list, the other stations are required to switch to ‘Lookup-only’ mode, which allows QuickFill to run the update at the maximum possible speed without having to lock anything. Regardless of what type of QuickFill system you have, you can never run more
Updates

Running updates

than one type of update at a time (i.e., you cannot run a billing update while a renewal notice update is running).

**Run it now exclusively, only lookup allowed**

When you select this option, only the workstation running the update or import may be in the database in regular mode; all other workstations must be in lookup mode. In addition, that workstation cannot have any other QuickFill screens open while the update or import is running. This mode provides the advantage of speed. Updates and imports are able to run more quickly when there is no other activity in the database.

**Run it now shared, all transactions allowed, much slower**

When you select this option, the workstation running the update as well as other workstations are permitted to continue to enter transactions, which implies that QuickFill must lock each subscription before it updates it. In a multiuser environment, this could slow the system down substantially. To view the IDs of stations that are currently running QuickFill in the normal mode, go to the “About QuickFill” screen. When you run an update as part of a job list, the other stations are required to switch to ‘Lookup-only’ mode, which allows QuickFill to run the update at the maximum possible speed without having to lock anything.

**Note: ‘Merge duplicates’ update**

Because the ‘Merge duplicates’ update requires your input for customers considered to be “near” matches, it may only be run in one of the “run now” modes, ‘Run it now exclusively, only lookup allowed’ or ‘Run it now shared, all transactions allowed, much slower’.

**Note: Purge updates**

The purge updates may not be run in “Run now” shared mode.

**Note:** when you choose either of the “Run now” options, a progress box similar to the one displayed for reports that are run in the “Run now” mode will appear on the screen. (See chapter 10, Reports, p. 10.16, for details.)

**Run with tonight’s jobs**

**Save to existing job list**

**Create a new job list**

For information on these three options, see chapter 10, Reports, p. 10.17.
Chapter 10

Reports

- Reports menu
- Filter screens
- Running reports
- Print saved reports
- Printing files on another computer
Reports menu

When you go to the main menu and choose ‘Reports’, you’ll see a list of subject areas about which you can get information from QuickFill’s reports. When you select any one of these areas, you will see a list of actual reports that you can run with QuickFill.

Each report has an individualized screen that allows you to filter the publications, codes and dates that are reported. After selecting the filter options you want, click the “OK” button to run the report. When the report has completed you will be given a choice of printing the report or viewing it on your screen. As an alternative to running the report immediately you can queue the report so that it is run overnight with other jobs. See p. 10.18 for details on options for running reports.

Unless you delete them, all reports are saved so that you can print or view them again at a later time. To print saved reports use ‘Print...’ on the ‘File’ or ‘Reports’ menu.

QuickFill includes a copy of the filter you used to generate a report as the final page (or pages) of the report. This is handy if you have questions, later on, about exactly what selections were used for a particular report.

Note: custom reports

If you have purchased and installed custom report programs, they will appear under the ‘Custom reports’ menu item. A custom report will only appear as a menu option if it is compatible with the version of QuickFill you are running. If a custom report disappears from the menu after installing a new version of QuickFill, either you forgot to install the updated version of the custom program or we forgot to send it to you. If you cannot find the correct version of the program, please contact technical support.
Reports

Reports menu

Refer to the built-in help system for more information on any of the reports below. The Reports menu offers the following commands:

Print… Lists files (including those created by reports, updates and exports) for printing, viewing, and deleting. Also provides access to the QuickFill Label Splitter. See p. 10.18 for more information on this menu item.

New Order Reports
New Order Analysis Reports on the week-by-week responses to a promotional campaign.
New Order Revenue Reports on the revenue received from a promotional campaign in comparison to the costs associated with running the campaign.

Renewal Order Reports
Renewal Order Analysis Reports on the relative success of different offers made on the same renewal effort.
Renewal Inventory Reports, by expire issue, the number of subscriptions that are at each renewal effort in a renewal series.
Renewal Revenue Reports on the amount of renewal revenue coming from different sources.
Renewal Rate Reports on the renewal rates of subscriptions from different sources.

Order Reports
Order History Counts orders received over a period of time.
Payment Rates Reports on payment rates for subscriptions from different sources.
Order Acknowledgements Produces order acknowledgements for paid new and renewal orders.
## Reports

### Reports menu

<table>
<thead>
<tr>
<th><strong>Expire &amp; Statistics Reports</strong></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expire Inventory</strong></td>
<td>Reports the number of customers, subscriptions, and copies expiring with each issue. This report also provides information on the number of copies needed to serve the upcoming issue as well as the income to be earned from that issue.</td>
</tr>
<tr>
<td><strong>Adds and Drops by Issue</strong></td>
<td>Reports the number of copies added and/or dropped since the previous issue was served along with reasons for the copies being added and/or dropped.</td>
</tr>
<tr>
<td><strong>Subscription Statistics</strong></td>
<td>Reports the number of subscriptions in your database broken down by status. This report may also be run to include a breakdown by cancel reason.</td>
</tr>
<tr>
<td><strong>Customer Statistics</strong></td>
<td>Reports counts of bill-to’s and ship-to’s demographics and random numbers. This report may also be used to obtain demographic counts for prospects.</td>
</tr>
<tr>
<td><strong>Prospect Statistics</strong></td>
<td>Reports the number of prospects in your database with various characteristics.</td>
</tr>
<tr>
<td><strong>Billing Update Preview</strong></td>
<td>Provides an estimate of the number of bills that will be produced the next time you run the ‘Billing’ update’ or ‘Issue Labels’ update.</td>
</tr>
<tr>
<td><strong>Renewal Update Preview</strong></td>
<td>Provides an estimate of the number of renewals that will be produced the next time you run the ‘Renewal notices’ update or ‘Issue Labels’ update.</td>
</tr>
</tbody>
</table>

### Accounting Reports

| **Accounts Receivable** | Reports accounts receivable. |
| **Credit Balance** | Provides a listing of subscribers who have a credit balance. |
| **Refund Preview** | Reports on customers who are due a refund. |
## Reports

### Reports menu

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Tax</td>
<td>Reports all sales tax related entries for the current accounting period.</td>
</tr>
<tr>
<td>Transaction Counts</td>
<td>Reports counts of all transactions and updates processed in the current accounting period.</td>
</tr>
<tr>
<td>Issue Summary</td>
<td>Reports the number of paid, complimentary, and free copies served as well as income earned for each issue in the issue range entered in the filter. This report is helpful when preparing a statement of ownership for the U.S. Postal Service.</td>
</tr>
<tr>
<td>Run Log</td>
<td>Reports major database events such as database checks, updates, imports, accounting closings, and backups.</td>
</tr>
<tr>
<td>General Ledger</td>
<td>Reports the values in QuickFill’s accounting fields broken down into four categories (period-to-date, year-to-date, inception-to-date, and unextracted amount).</td>
</tr>
<tr>
<td>Deferred Income</td>
<td>Provides a customer-by-customer listing of your deferred income.</td>
</tr>
<tr>
<td>Accounting Detail</td>
<td>Provides a summary, by account, of all the accounting entries since the start of the current period.</td>
</tr>
</tbody>
</table>

### Customer Lists

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Promotional Labels</td>
<td>Provides labels for customers who fit the criteria specified on the filter.</td>
</tr>
<tr>
<td>Promotional Labels Using Qualification Filter</td>
<td>Selects customers based on audit data. This version of the promotional labels report may only be accessed from the audit system.</td>
</tr>
<tr>
<td>Customer Directory</td>
<td>Provides a list of customers who fit the criteria specified on the filter along with their subscriptions.</td>
</tr>
<tr>
<td>Customer Directory Using Qualification Filter</td>
<td>Selects customers based on audit data. This version of the customer directory report may only be accessed from the audit system.</td>
</tr>
</tbody>
</table>
# Reports

## Reports menu

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Subscriptions</td>
<td>Generates a listing of group, two-party, and/or gift subscriptions.</td>
</tr>
<tr>
<td>Agency Subscriptions</td>
<td>Reports on customers whose current order is part of an agency subscription.</td>
</tr>
<tr>
<td>Complimentary Subscriptions</td>
<td>Provides a complete listing of complimentary subscriptions.</td>
</tr>
<tr>
<td>Customer Search</td>
<td>Reports on orders based on the purchase order number(s), credit card number(s), check number(s), or telephone number(s) entered on the filter.</td>
</tr>
<tr>
<td>Mismatched Country Codes</td>
<td>Provides a list of customers whose country codes do not match their country names.</td>
</tr>
<tr>
<td>Duplicate Subscriptions</td>
<td>Provides a list of customers who have more than one subscription to the same publication.</td>
</tr>
<tr>
<td>Blanket Renewals</td>
<td>These reports produce renewal notices for customers even when they are not due for renewal.</td>
</tr>
<tr>
<td>Standard Blanket Renewals</td>
<td>Creates standard or mail-merge renewal notices.</td>
</tr>
<tr>
<td>Gift Blanket Renewals</td>
<td>Creates long form renewal notices. These notices list the ship-tos who belong to a gift or group subscription.</td>
</tr>
<tr>
<td>Audit Reports</td>
<td>The audit reports may only be accessed from the audit system.</td>
</tr>
<tr>
<td>Qualified Circulation</td>
<td>Reports on Paragraphs 3(a), 3(b), 3(c), and/or 4 of the Publisher's statement. This report is helpful in determining the impact of adding members of a prospect list to your circulation or removing some of your existing nonpaid subscribers.</td>
</tr>
<tr>
<td>Publisher's Statement</td>
<td>Provides a facsimile of the ABC, BPA or VAC Publisher’s Statement, including Form 1-2 for BPA audited publications.</td>
</tr>
</tbody>
</table>
## Reports

### Reports menu

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credit Cancels</td>
<td>Reports on the numbers of customers who have been suspended or canceled for nonpayment.</td>
</tr>
<tr>
<td>Audit Issue Galley</td>
<td>Reports on customers who received the audit issue.</td>
</tr>
<tr>
<td>Additions and Removals List</td>
<td>Lists the names added to or removed from the circulation for each issue in the audit period.</td>
</tr>
<tr>
<td>Average Circulation</td>
<td>Provides a circulation breakdown by classification code for all issues included in the issue range you specify.</td>
</tr>
<tr>
<td>Average Prices (ABC, BPA)</td>
<td>Proves the figures reported on the Publisher’s Statement report for the overall average price calculation. Lists all of the orders in a specific price group.</td>
</tr>
<tr>
<td>Order Price Quartiles (ABC)</td>
<td>Reports pricing data as a percentage of the basic price.</td>
</tr>
<tr>
<td>Order Prices (VAC)</td>
<td>Lists all of the orders in a specific price group shown on the VAC Publisher’s Statement report.</td>
</tr>
<tr>
<td>Order Terms (ABC, BPA)</td>
<td>Lists orders received with a specified group of terms.</td>
</tr>
<tr>
<td>Sales Channels (ABC)</td>
<td>Lists orders obtained via specified sales channels.</td>
</tr>
<tr>
<td>Premium Usage (ABC, BPA)</td>
<td>Lists orders sold with specified premiums.</td>
</tr>
<tr>
<td>Graced Copies (ABC, BPA)</td>
<td>Lists orders that were served grace issues during the reporting period.</td>
</tr>
<tr>
<td>Renewals (ABC, BPA)</td>
<td>Lists orders that expired within a particular range of issues together with an indication of whether or not the subscription was renewed.</td>
</tr>
<tr>
<td>Requalification Analysis</td>
<td>Provides a count of requalification orders based on requalification source or channel.</td>
</tr>
</tbody>
</table>
Reports

Reports menu

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regenerate galley file</td>
<td>Recreates the audit issue galley data file in the event that it is lost or damaged.</td>
</tr>
</tbody>
</table>

**Definitions Reports**

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing Plan List</td>
<td>Reports on marketing plans that you have defined along with the tracking codes associated with each one.</td>
</tr>
<tr>
<td>Publication Definitions</td>
<td>Reports on the fulfillment policies as established in your publications definitions.</td>
</tr>
<tr>
<td>Tracking Codes Definitions</td>
<td>Provides a complete description of the tracking codes you have defined.</td>
</tr>
<tr>
<td>Foreign Country List</td>
<td>Reports on countries in the foreign countries table. This report lists each country code along with its country name, default shipping class, and address format for postal codes.</td>
</tr>
<tr>
<td>Subscription Agency List</td>
<td>Provides a listing of the subscription agencies defined in your database.</td>
</tr>
<tr>
<td>Renewal Series</td>
<td>Provides a complete description of the renewal series defined in your database.</td>
</tr>
<tr>
<td>Offers Definition</td>
<td>Provides a complete description of the offers defined in your database.</td>
</tr>
<tr>
<td>Split Tables Definition</td>
<td>Provides information on the label split table definitions in the database.</td>
</tr>
<tr>
<td>Billing Series</td>
<td>Provides a complete description of the billing series defined in your database.</td>
</tr>
</tbody>
</table>

**Note: ODBC drivers**

In addition to the multitude of reports designed to meet your needs, QuickFill also provides ODBC drivers that provide read-only access to your database. (See appendix F, *QuickFill & ODBC*, for more details.)
Filter screens

Once you choose a report from the ‘Reports’ menu or an update from the ‘Updates’ menu, you must fill in a filter screen. That is, you must answer questions on the screen about your report or update. Your answers give QuickFill additional information about the specific report or update you want to run.

Report description

This field appears at the top of each filter screen. Whatever you enter here will appear on the third line of your report’s “header.” Enter in this field any special description you want to give your report. The report description also appears on the list of scheduled reports that is displayed when looking at the contents of a job list. (See chapter 13, Jobs, for more details on job lists.) You can use this description to distinguish between several runs of the same report that have different filter criteria.

Update description

This field appears at the top of the ‘Make trial subscriptions’ update, ‘Cancel trial subscriptions’ update, ‘Make controlled subscriptions’ update, and ‘Cancel controlled subscriptions’ update. Whatever you enter here will appear on the third line of the report (in the report “header”) created by your update. Enter in this field any special description you want to give your update report. The report description also appears on the list of scheduled updates that is displayed when looking at the contents of a job list. (Refer to chapter 13, Jobs, for more details on job lists.) You can use this description to distinguish between several runs of the same update that have different filter criteria.

Company name

The company name is also part of your report’s header. QuickFill prints the name you type in this field at the top of each page of your report. Note that you need to enter your company name only once when you create your first report. After that first time, QuickFill remembers the name, and it automatically appears each time you call up a filter screen. Reenter this information only if you decide to use a different name.

Nonzero price, Zero price

If you check the Nonzero price checkbox, your report will include orders with a nonzero price. If you check the Zero price checkbox, your report will include orders with a zero price. (To select these boxes, click once in them so that a check mark appears in each box.)
# Reports

## Filter screens

The order that QuickFill examines to determine whether or not the price is zero depends on which report you are running:

<table>
<thead>
<tr>
<th>Report</th>
<th>Order examined</th>
</tr>
</thead>
<tbody>
<tr>
<td>New order analysis</td>
<td>New order</td>
</tr>
<tr>
<td>Order history</td>
<td>New or renewal order</td>
</tr>
<tr>
<td>New order revenue</td>
<td>New order</td>
</tr>
<tr>
<td>Renewal revenue</td>
<td>Renewal order</td>
</tr>
<tr>
<td>Renewal orders by channel</td>
<td>Order undergoing renewal</td>
</tr>
<tr>
<td>Renewal inventory</td>
<td>Most recent order</td>
</tr>
<tr>
<td>Expire inventory</td>
<td>Most recent order</td>
</tr>
<tr>
<td>Subscription statistics</td>
<td>Most recent order</td>
</tr>
<tr>
<td>Group subscriptions</td>
<td>Most recent order</td>
</tr>
</tbody>
</table>

If you select one or more of these check boxes, your report will only include orders whose audit classification matches the selections made. If your report includes publications that are not audited (and thus do not have audit classification data), the report will select orders based on the price field. If you select either or both of the paid check boxes (Qual paid or Nonqual paid), then, for nonaudited publications, your report will include orders with a nonzero price. If you select either or both of the nonpaid check boxes (Qual nonpaid or Nonqual nonpaid) then your report will include orders with a zero price.

### Date range fields

Any time a report filter contains date range fields, you can either right click once or press the F2 key to select from a list of date ranges. For example, to produce a report that shows the number of new orders entered during the week, select “Current week” in the date range field on the filter for the ‘Order history’ report. When you do, QuickFill enters a date range that covers Sunday through Saturday of the current week in the fields to the right of the relative date (“Current week”). To enter your own date range, select ‘Custom dates’ from the list and then type the date range you would like to use in the fields to the right.

The ability to select relative date ranges is most useful when you save report filters to job lists. This allows you to run the job lists without having to change the date range. For example, if you run the same set of reports at the end of each week, simply create a “Week’s end” job list and schedule the reports you want to run at the end of the week using a date range of “Current week.” Every time you run the “Week’s end” job list QuickFill will automatically produce reports with information for Sunday through Saturday of the current week.

### Issue range fields

Whenever you use issue range fields (such as the ‘Expire issue’ fields on the ‘Promotional labels’ report) and do not fill in both fields, QuickFill will only
include one issue based on the entry in the field you did fill in. For example, if you enter “___ to 40” or “40 to ___” QuickFill will only include issue 40. In addition, if you enter a zero in one of the fields, that field will be treated as if it were blank. So if you run a report using an issue range of “0 to 40,” QuickFill will only include issue 40.

Random numbers
The ‘Random numbers’ fields let you include or exclude orders based on the customer’s random number. Fill in one or more ranges, and your labels will include customers with random numbers in those ranges only.

QuickFill automatically assigns every customer a random number from 0 to 99 when you initially enter his or her first subscription. The customer keeps this number as long as he or she remains in your database. You can then use the random numbers to separate your customer list into distinct groups for testing or renting mailing lists. (Unlike an “nth name” system, where you select every fifth customer, QuickFill’s random number system ensures that you’ll keep together groups of customers when you add or delete a name.)

On report filters, you’d use the random numbers for only unusual tests. For example, you may want to choose 50 random numbers and send all the customers with those numbers a complimentary binder at the start of their subscription. You could then run a report on the customers with the random numbers that received binders and the customers that did not and compare renewal rates for the two groups.

Here’s another example of how you’d use the random numbers. Say Flying High magazine wants to rent 2,000 names from your 10,000 name PUB1 list. You simply select 20 random numbers (1 through 20, for example) to get a 2,000-name random selection of your customers. Now, say, Flying High decides its response to your list merited mailing to your whole list. However, it doesn’t want to mail to the same 2,000 customers it mailed to previously. You simply run names and exclude those 20 numbers.

You can also use the random numbers for pulling out groups of customers for testing. For example, you want to test a new billing series on half your customers at random. You simply send that package to 50 random numbers.

The ‘Random number counts’ version of the ‘Customer statistics’ report provides a count of customers for each random number.

Seed names
You use seed names—names that when mailed come back to you—to monitor use of mailing lists you rent. If you mark a name as a seed, QuickFill includes it any time you run promotional labels, regardless of whether it meets the other selection criteria you choose. (You can, however, ask QuickFill to exclude seed names.)
Reports

Filter screens

Note: other filters that allow you to select seed names:

You may also select seed names from the ‘Customer directory’ report, ‘Qualified circulation’ (audit system) report, and the ‘Customer export’, the ‘Subscription export’ and the ‘Prospect export’ screens. The filter tabs for these reports are set up to include seed names by default.

QuickFill also lets you change the first name of these seeds when you run promotional labels in order to track the use of each copy of a list you rent. Here’s an example of how you’d use QuickFill’s seed name capability. Say you rent your list to FoulPlay magazine. FoulPlay rekeys it and mails it 10 additional times without paying for the extras. How do you stop them?

When you rent a list, you plant seed names—names that come back to you when mailed—so you can monitor the use of your list. Since QuickFill lets you substitute a unique first name for your seed names each time you run the list, you can differentiate between a copy of the list you rented to FoulPlay and a copy you rented to Straight Arrow. (FoulPlay’s mailing would come back to you as A. B. Smith and Straight Arrow’s would come back as A. C. Smith.)

Each filter screen also includes several fields that let you choose specific orders, customers, or categories of orders or customers you want to include or exclude in your report.

In addition, a number of the filter screens allow you to include or exclude customers based upon the status of their subscription. In these instances, the status codes listed below may be used:

- Active
- Active, cancel at expiration
- Graced
- Expired
- Suspended indefinitely
- Suspended for nonpayment
- Suspended temporarily
- Canceled by request
- Canceled at expiration
- Canceled for nonpayment
- Canceled and transferred
- Canceled by publisher

There are also three codes that may be used to represent a group of statuses. They are ‘A*’ for the statuses ‘A’, ‘AX’, and ‘G’; ‘C*’ for ‘CC’, ‘CX’, ‘CN’, ‘CP’, etc.
Reports

Filter screens

and ‘E’; and ‘*’ for all statuses except ‘SI’ and ‘ST’. To display these codes while on a report filter, go to the ‘Status’ field and press F2, or right click in the field.

Example: If you wanted to generate promotional labels for anyone with a status of canceled or expired, you could run your ‘Promotional labels’ specifying ‘C*’ in the status field. It is much more efficient to enter this one code to select a number of different statuses (‘CC’, ‘CN’, ‘CX’, ‘CP’, ‘E’) than it is to enter each of the codes separately.

Hints for filling in report filters

❖ To select an item that has a check box or blank circle next to it, simply click once on the field with your left mouse button so that a check mark appears or that the circle is filled in.

❖ To display the list of defined codes for a specific field (such as the publication field, channel field, tracking code field, etc.), simply press F2 or right click once on the field.

❖ You can leave all the fields blank. If you do, your report will include all orders or customers in all categories.

Example: You choose ‘New order analysis by list’ and leave all fields blank. Your report will show (broken down by mailing list) all new orders for all publications on all tracking codes. And it won’t matter which marketing plan, channel, or marketing package the new orders came from.

❖ You can fill in one or more fields in a specific category or categories. Your report will include only orders or customers that match the fields you’ve selected.

Example: You choose ‘New order analysis by list’. You’ve used three marketing plans, but you want to see results from only two—Plan1 and Plan2. Enter Plan1 and Plan2 in the ‘Marketing plan’ fields, and your report will include new orders—broken down by list—from only those plans.

❖ You can check the ‘EXCLUDE’ box. Your report will exclude orders or customers that match any of the fields you’ve selected. This method is an alternative to the one we just described.

Example: You want the same result as described in the previous example. So you enter Plan3 in the ‘Marketing plans’ box and check the ‘EXCLUDE’ box. Again, your report will include new orders—broken down by list—from Plan1 and Plan2 but not new orders from Plan3.
You can use wild cards to select groups of codes. An asterisk matches any nonblank sequence of characters or spaces in the remainder of the field. A question mark matches any single character. The ability to use wild cards provides greater flexibility by making it easier to select groups of customers based on marketing plans, tracking codes, status codes, and many other codes when running reports.

*Example:* You defined your marketing plan codes in such a way that the first two characters are the year in which the plan was used. Your 2001 plans were coded as 01SPR and 01FALL, and your 2002 plans were coded as 02SPR and 02FALL. To obtain a report on only the 2002 plans you could enter ‘02*’. To obtain a report on all of the spring promotional plans you could enter ‘SPR’. To obtain a report on all of the spring promotional plans from 2000 to 2009 you could enter ‘0?SPR’.

*Note: using the asterisk wild card on report filters*

If you use ‘*’ alone in any field on the report filter, QuickFill will include in your report all orders or customers for which that field is non-blank.

*If you’ve filled in fields in more than one category, an order or customer will appear in the report only if it belongs to all the categories you’ve selected.*

*Example:* You choose ‘New order analysis by list’, and enter Plan1 in the ‘Marketing plan’ category and List1 in the ‘Lists’ category. Your report will include only those new orders that you received by using both List1 and Plan1.

*If you EXCLUDE orders or customers in more than one category, QuickFill excludes an order or customer if it belongs to any of the categories.*

*Example:* You choose ‘New order analysis by list’, and exclude Plan2 in the ‘Marketing plan’ category and List2 in the ‘List’ category. Your report will exclude all orders from Plan2 as well as orders from List2.

*If you’ve used both the include and exclude categories, the exclusion overrides the inclusion.*

*Example:* You choose ‘New order analysis by list’. You exclude List1 and include Pub1 If a new order happens to fall in both categories (for instance, Mr. Smith subscribes to Pub1 and you got his name from List1), QuickFill excludes that new order from your report.
Remember, whenever you want to choose an item, just right click in the field or press F2. A box will pop up displaying a list of available choices. Put your cursor over the choice you want, and press Enter to place your selection in the right field.

Filling in the filters isn’t as complicated as it sounds. Here’s another example. Say you choose the ‘New order analysis’ report. You want a report on all new orders (sorted by list) to Pub1 and Pub2 that were entered in the second half of 2006, but you want to exclude any that came from List1. You enter Pub1 and Pub2 in the publications fields, enter List1 in the list fields, and check the EXCLUDE box for lists. Here’s how the filter would look.

See p. 10.16 for information on running reports.
Running reports

After you have filled out the filter screen for a report, click on “OK,” and the screen below will appear. (The options on this screen also apply to the customer, subscription, and prospect exports.)

![QuickFill for Windows dialog box]

Select this option (by clicking on it) if you are running a starter kit or single user QuickFill system and would like to run your report immediately.

**Warning: running reports**

This option should not be used if you are on a two-user, four-user, six-user, or unlimited multiuser QuickFill system; it takes much longer to run a report in “run now” mode in a multiuser system. If, however, you are running a multiuser system and have entered QuickFill in single user mode, you may select this option.

After you select the “run now” option and click on “OK,” a progress bar will appear and the report will begin to run. If you are running a report, once it is done you will see a box similar to the one on the following page. You can then print or preview the output. To place the output in ‘Print saved reports’ for printing and viewing at a later time, click on “Close.”
Run it with tonight’s jobs
Select this option, by clicking on it and then clicking on “OK,” if you would like to add your report, update, or import to the “Tonight’s jobs” job list. After you click on “OK,” the item will be added to the “Tonight’s jobs” job list and you will be left on the report, update, or import screen where you can either set up another report, update, or import or press Esc to get back to the main menu. The items that you schedule to run with “Tonight’s jobs” will not be run until you go to ‘Run tonight’s jobs’ under the ‘Jobs’ menu and run the job.

Save it to existing job list
If you would like to add your report/update to a job list other than the “Tonight’s jobs” job list, select this option (by clicking on it) and then right click once in the blank field to the right of it to select a job list to which you would like the report, update, or import to be added. After you click on “OK,” the item will be added to the job list you specified and you will be left on the report, update, or import screen where you can either set up another report, update, or import or press Esc to get back to the main menu. The items that you schedule to run will not be run until you go to ‘Edit Job lists’ under the ‘Jobs’ menu and run the job that contains them.

Create a new job list
If you would like to create a new job list for your report, update, or import, select this option by clicking on it and then enter a name for the new job list in the blank field to the right. After you click on “OK,” the item will be added to the newly created job list and you will be left on the report, update, or import screen where you can either set up another report, update, or import or press Esc to get back to the main menu. The items that you schedule to run will not be run until you go to ‘Edit Job lists’ under the ‘Jobs’ menu and run the job that contains them.

See chapter 13, Jobs, for more details on job lists.
Print saved reports

The ‘Print…’ menu item takes you to a screen titled ‘Print Saved Reports’, which provides access to the reports, labels, bills, renewal notices, and mail-merge files that you created over time. You can use this screen to print, view, or delete (1) the reports you created by using the ‘Reports’ menus; (2) reports, issue labels, bills, and renewal notices you created by using the ‘Updates’ and ‘Accounting’ menus; and (3) batch reports created by entering transactions or running updates. You can also use this screen to export reports to Microsoft Excel.

When you select ‘Print…’, QuickFill displays a screen with four tabs (‘Reports’, ‘Labels’, ‘Forms’, and ‘Mail Merge’). The first tab, ‘Reports’, displays all the reports you’ve saved, the ‘Labels’ tab displays all the label files you have saved, and the ‘Forms’ tab displays all of the bills, order acknowledgements, and renewal notices you have saved, and the ‘Mail Merge’ tab displays all of the mail merge files with a “csv,” “txt,” or “dbf” extension that you have saved. (If you haven’t saved any reports, you’ll see the message “No files.”) For each report, you’ll see the name of the report, and the date and time in which it was created and its size.

Each time you select the ‘Print…’ menu item, QuickFill sorts the reports first alphabetically by report name, then by date and time. To change the sort order, simply click on a column heading to indicate the sort order that you would like to use. For example, to sort the reports by file size, click on “Size.” (If you click on either “Date” or “Time,” the reports will be sorted by date first and then by time.)

You can move easily between tabs by using the Ctrl-RightArrow and Ctrl-LeftArrow key combinations or your mouse.

Note: You can also select the ‘Print…’ menu item by clicking on the “Print” toolbar button—

Tip: file name

The file name is useful if you want to email it to someone or copy it to another computer. To see the file name for a report, label, or form, click the ‘File names’ option on the ‘View’ section on the bottom right
corner of the screen. You will see the actual file names of the reports instead of their descriptions.

Note: storing report files
QuickFill stores all your report files in a separate directory. When you initially install QuickFill, it automatically sets this directory to the ‘Reports’ directory beneath the database directory. But you can change the name of the directory if you want to. The location of the report files is displayed on the “About QuickFill” screen and is defined on the ‘General’ tab of the ‘Preferences’ definition screen. (See chapter 8, Definitions, p. 8.67, for details.)

Note: storing mail-merge files
QuickFill stores all your mail-merge files in a separate directory. When you initially install QuickFill, it automatically sets this directory to the ‘Mailmerge’ subdirectory beneath the database directory. But you can change the name of the directory if you want to. The location of the mail-merge files is displayed on the “About QuickFill” screen and is defined on the ‘General’ tab of the ‘Preferences’ definition screen. (See chapter 8, Definitions, p. 8.67, for details.)

Print
To print a report, place your cursor on the report and double click on it. (You can also place you cursor on the report and then click on “Print” or right click and select “Print.”) The box below will appear:
Reports

Print saved reports

The printer name that appears in this dialog is the default printer that you chose on the “Page Setup” screen. If you have never visited the “Page Setup” screen then it will be the Windows default printer. You do not have to use this printer—you can choose any printer from the drop down list in the printer dialog.

If you want to print only part of a report, click on “Pages” in the ‘Print range’ section of the screen and then enter the range of pages that you would like to print. If you want to print the whole report, leave the ‘Print range’ section of the screen as it is (with “All” selected).

When you’re ready to print, click on “OK.”

You can interrupt the printing at any time by clicking on “Cancel” in the print status box that appears during printing. Printing will stop.

To print more than one report at a time you can select several report files or label files at once. To select a range of files, left click the first file and then hold down the Shift key and click the last file in the range. To select a disjoint set of files, left click the first file and then hold down the Ctrl key and click the other files. When you have finished selecting your files click the “Print” button and all of the selected files will be queued up for printing.

Label format

As you know, Cheshire labels are printed on regular paper, then cut and glued by a Cheshire machine. So when it prints these labels, QuickFill puts the cover sheet on the first page; separate from the actual labels. This helps the Cheshire operator feed the machine more easily. If you do not want to print the cover sheet, you can start printing at page 2. When you print pressure-sensitive labels, the actual labels are printed on the same page as the cover sheet, so you don’t waste an entire page of expensive labels.

Preview

To view a report on the screen, place your cursor on the report and click on “Preview” or right click and select “Preview.” The report will be displayed on your screen. (Refer to “Printing, and print preview” in the built-in help system’s index for information on the ‘Print preview’ screen.)

Once you’ve finished viewing your report, press Esc to return to the list of reports in ‘Print saved reports’.

Printing or previewing mail-merge files with Microsoft Word templates

QuickFill makes it easy to perform a mail merge operation using Microsoft Word. If you select a bill or renewal data file from the ‘Mail Merge’ tab and click the “Print” or “Preview” button QuickFill will automatically start
Microsoft Word and perform a mail merge. If you click “Print,” the bills or renewals are printed directly. If you click “Preview,” the mail merge is performed to a new document which you can review and decide whether you want to print, save or cancel. QuickFill will automatically search your computer for the appropriate mail-merge template based on the type of mail-merge file you are trying to preview and the publication code and form code in that file. (When previewing large mail merge files, you may need to use the “Cancel” button so that only a portion of the file is merged. Whether or not you can preview the entire file depends on the amount of memory in your computer.)

When searching for mail-merge templates, QuickFill looks for files that are located in your database directory or in your program directory that are named TTTTTTT_PPPPPP_FFFFFF.XXX where “TTTTTTT” is the type of file (“Bill,” “Renewal,” or “Ack”—for acknowledgement), “PPPPPP” is the publication code, “FFFFFF” is the form code (or “BLANK” if there is no form code) and XXX is either DOT or DOC. If a file is not found, QuickFill then searches for files named TTTTTTT_PPPPPP.DOT. If a file still is not found, QuickFill searches for files named TTTTTTT.DOT. If this final search fails, you will be asked to specify the mail-merge template that you would like to use. For example, suppose that you have a mail-merge renewal file named Renewals_MYPUB_001.txt which contains renewals for pub MYPUB that were created from renewal package REN1 whose definition includes form code SPEC1. When you print or preview this file QuickFill will follow this sequence looking for a template file:

```
\qfw\database\Renewal_MYPUB_SPEC1.dot
\qfw\database\Renewal_MYPUB_SPEC1.doc
\qfw\Renewal_MYPUB_SPEC1.dot
\qfw\Renewal_MYPUB_SPEC1.doc
\qfw\database\Renewal_MYPUB.dot
\qfw\database\Renewal_MYPUB.doc
\qfw\Renewal_MYPUB.dot
\qfw\Renewal_MYPUB.doc
\qfw\database\Renewal.dot
\qfw\database\Renewal.doc
\qfw\Renewal.dot
\qfw\Renewal.doc
```

where qfw is the directory where the QuickFill program is installed and \qfw\database is the directory that contains the database files.

Please note that QuickFill will not be able to locate a template whose name includes a form set code if you specified the “MMERG1” mail-merge format on the bill or renewal package definition screen. The “MMERG1” file format does not include a field for the package code, thus preventing QuickFill from getting
Reports

Print saved reports

the form set code from the package definition. If you have form specific
template files you must specify the “MMERG2,” “MMERG3” or “MMERG4”
format on your bill or renewal package definition.

Email  This button is only active for dBASE files that are intended for email delivery of
renewal notices. These files have names of the form ERENnnn.DBF and
BRENnnn.DBF. Delivery of renewal notices via email requires that you install
a copy of Gammadyne Mailer. For complete details on delivery of renewal
notices refer to “How to,” “Send renewal notices by email” in the table of
contents for QuickFill’s built-in help system.

Print & Delete  To print and then delete a report, place your cursor on the report and click on
“Print & Delete.” When you’ve finished printing, QuickFill will delete the
report.

Please note that deleted reports are permanently deleted. They are not placed
in the Windows Recycle Bin. If you need to print another copy of a deleted
report you will need to run the report again. QuickFill will not automatically
delete output from the ‘Updates’ runs (bills, issue labels, renewal notices, and
so forth) that you can’t re-create without restoring information in your
database. In these cases, QuickFill gives you a warning message and asks if
you’re sure you want to delete the report before it takes any action. Only if you
choose ‘Yes’ will QuickFill delete the report.

Delete  To delete a report that you have already printed and no longer need, place your
cursor on the report name and click the “Delete” button. Please note that
deleted reports are permanently deleted. They are not placed in the Windows
Recycle Bin. If you need to print another copy of a deleted report you will need
to run the report again. Again, QuickFill will not delete the output from update
runs (bills, issue labels, renewal notices, and so forth) that you cannot re-create
without restoring your database. In these cases, QuickFill will give you a
warning message and ask if you’re sure you want to delete the report before it
takes any action.
Reports

Print saved reports

To delete more than one report at a time you can select several report files or label files at once. To select a range of files, left click the first file and then hold down the Shift key and click the last file in the range. To select a disjoint set of files, left click the first file and then hold down the Ctrl key and click the other files. When you have finished selecting your files click the “Delete” button and all of the selected files will be deleted at once.

Align To ensure your labels will be printed properly you can print an alignment pattern for them by clicking on “Align” or right clicking and selecting “Align.” You can print alignment patterns as often as necessary to ensure that your labels will be aligned properly. For information on the page setup for labels, refer to “File menu,” “Page setup,” “Label setup” in the table of contents for QuickFill’s built-in help system.

Refresh To see the most up-to-date list of reports, labels, or forms, click on “Refresh” and QuickFill will update the screen to reflect any changes (such as newly created items or deleted items) since you selected the ‘Print…’ menu item.

Label Groups To view the groups of labels in your label files, select a label file and click “Label Groups.” The screen that appears will show you the groups of labels in your label file sorted by publication, issue number, shipping class, and so forth. You can use the “Label Groups” screen to split your label files into separate files, say with all of the back issue labels in one file and the main issue run in another file. You can also convert the label files into dBASE files. See appendix E, Postal Presort & QuickFill Label Splitter, for further details on the ‘QuickFill Label Splitter’.

Export to Excel You can export reports as well as dBase files from QuickFill to Microsoft Excel.

Exporting reports

Select a report and click on “Export to Excel” to create a Microsoft Excel spreadsheet from any QuickFill report. If you have Microsoft Excel on your computer, the exported spreadsheet will automatically open in Excel after you enter a file name or accept the file name entered by QuickFill and click on “Save.” If you do not have Excel installed, the report will be created after you click on “Save” and you will be returned to the ‘Reports’ tab.

The top line of QuickFill’s report header (that is, QuickFill version and build number, company name, and page number) is used as the page header in Excel. The remaining lines of the report header are included in the worksheet.

The tabs on the worksheets are labeled based on the report that is exported. For example, a renewal order batch report includes one worksheet labeled “Accounting” that contains all of the accounting entries in the batch and one worksheet labeled “Payments” that contains a list of the payments in the batch. If the batch contains payments for more than one publication, a separate
Reports

Print saved reports

worksheet (labeled “Payments1,” “Payments2,” etc.) is created for each publication.

There is a limit of 65,536 rows per worksheet in Excel. When a worksheet exceeds this limit, a “Maximum rows in a worksheet exceeded. Report is incomplete.” message is included at the bottom of the worksheet.

Exporting dBase files

dBase (or “DBF”) files are commonly produced by QuickFill by the issue label update, by subscription and customer exports and by the Label Splitter. We recommend using dBase files when exchanging data with other systems. dBase files are self contained, that is they contain both the actual data and the field names, types and lengths. Comma delimited and Excel files contain field names, but not the field lengths and types. Despite these advantages we sometimes run into mail shops and other providers who will not accept dBase files, but insist on receiving Excel files, this despite the fact that Excel has the built-in ability to open dBase files. To accommodate these needs QuickFill will convert a dBase file to an Excel file for you. The file must be located in the QuickFill mail merge directory (this is the default location for dBase files produced by QuickFill).

To export a dBase file to Excel, select the file on the ‘Mail Merge’ tab of the ‘Print Saved Reports’ screen and click the “Export to Excel” button. QuickFill will start Microsoft Excel, instruct it to read the dBase file and will then save it using the same file name but with an XLS suffix. Excel will then close and you will see the new Excel file located next to the original dBase file on the ‘Print Saved Reports’ screen.

There are a couple of restrictions to this feature:

1. Files with more than 65,535 records cannot be converted to Excel. Excel spreadsheets inherently have a limit of 65,535 rows.

2. Microsoft Excel must be installed on your computer. Any version from Excel 97 or later is acceptable.

Report limits

QuickFill has room for 500 reports of each type (i.e., 500 batch reports, 500 order history reports, 500 issue label files, etc.). If you’ve already saved 500 reports of the same type and try to create another, you’ll get an error message, and QuickFill will abort the report you’re trying to create.

You shouldn’t find this limit a problem, because you’ll probably start deleting reports you don’t need well before you hit the 500 mark.

But what if you do go over the limit?
With reports you created from the ‘Reports’ menu, you can delete or rename some of your saved reports, then rerun the new report. (To see how to rename these files, see “Technical note on saved reports” below.)

When you use the ‘Updates’ menu, QuickFill checks to make sure it can create the necessary files before changing your database. So you won’t harm your existing database in any way if you go over the 500-report limit. You will, however, need to delete (or rename) some of your saved reports and restart the ‘Updates’ process.

You cannot restart the programs that create batch reports in this way. If you hit the 500 limit while you’re creating a batch report, QuickFill won’t create the report and you won’t be able to create it later. You can, however, gain access to the same information by using the ‘View batch log’ menu on the ‘Accounting’ menu. (See chapter 7, Transactions, p. 7.27, for more information on batch reports.)

If, for some reason, you want to save more than 500 reports of the same type you can move the reports out of the folder where QuickFill normally keeps them into another folder of your own choosing. Choose the ‘About QuickFill’ command from the ‘Help’ menu to see the exact location of the reports folder.

Note: Since the reports directory is set from the ‘General’ tab of the “Preferences” definition screen (see chapter 8, Definitions, p. 8.68, for details), this option provides you with the most efficient way to access your old reports. When you want to view old reports, you can simply enter your alternate reports directory in the ‘Directory for reports’ field on the ‘Preferences’ definition screen. Then, QuickFill will only display the files in that directory when you select ‘Print...’ from the ‘Reports’ menu.

Technical note on saved reports

QuickFill saves reports in a proprietary format. You will not be able to examine or modify these files with a word processor, but you can export them as Microsoft Excel files. QuickFill assigns a name to report files in the format ReportType-nnn.qfrpt (label files have an extension of qflab and bill and renewal files have an extension of xml), where ”nnn” is a number from 001 to 500. (QuickFill always assigns the lowest available number—not necessarily the next in sequence.) Saved bills, renewals and order acknowledgements are stored in XML files that can be viewed in Internet Explorer or a text editor.
If you would like to use a workstation that does not have access to your QuickFill database for printing your update and report files, you can install the demo version of QuickFill on that workstation. However, there is one limitation. You will not be able to use the 'QuickFill label splitter' to create dBase files from your labels; this process requires access to the database from which the labels were produced.

To install the demo version of QuickFill, simply use your QuickFill for Windows installation CD. Then copy (or backup and restore) your update and report files from the reports directory for your database to the reports directory for the demo database.

Note: installing the demo version on multiple workstations

Your QuickFill license allows you to install the demo version of QuickFill on as many workstations as you like.
Chapter 11

Accounting

- Accounting menu
- Overview
- Selecting accounting policies & options
- Journal entries
You use the entries on the accounting menu to close the miscellaneous batch, define the accounting codes used by your accounting system, extract journal entries for posting to your accounting system, close the journal for the current period, close the journal for the current year, and view the batch log for any batch. The Accounting menu offers the following commands:

**Close Miscellaneous Batch**  Provides the ability to close the “Miscellaneous” batch—the batch containing all non-batched transactions (i.e., cancel, address change, adjust order, etc.).

**Account Codes**  Displays QuickFill’s internal ledger accounts and the amounts you have accumulated in each of them for the period-to-date, year-to-date, inception-to-date, and unextracted amount. In addition, you can use this screen to assign account codes that correspond to the codes in your own accounting system.

**Journal Extract**  Produces a report and disk file that contains the journal entries you have accumulated since the last time this update was run.

**Close Period**  This update closes out the current accounting period and provides reports on the accounting activity for the period.

**Close Year**  This update closes out the current accounting year as well as the current period and provides reports on the accounting activity for both the period and the year.

**View Batch Log**  Displays a list of all batch reports created during the current accounting period.
Note: close miscellaneous batch

For reporting purposes, you should, at a minimum, close the miscellaneous batch at the end of each day as well as before running any reports. By doing so, you will not have to wonder whether or not the renewal rate report you ran last week was run before or after you entered a batch of cancellations. You will be able to tell by checking the batch number at the top of the report.

Refer to the built-in help system for more information on any of the items on the ‘Accounting’ menu.
QuickFill’s accounting facility is designed to support—not replace—your existing accounting system. To this end, QuickFill keeps track of all the accounting for your subscription income. QuickFill generates reports and files that let you post this data to whatever accounting system you use. (Because QuickFill provides accounting data for your subscription income only—not for the rest of your business—it cannot replace your existing accounting system.)

Here’s how QuickFill’s accounting facility works: Whenever you enter certain transactions or run certain updates, QuickFill posts entries to its internal general ledger. It keeps this ledger on a double-entry bookkeeping method. You can see the contents of the ledger either by selecting ‘Account codes’ under ‘Accounting’ on the main menu or by running the ‘General ledger’ report under ‘Reports’ on the main menu.

When you begin using QuickFill, this internal ledger contains no accounts or entries. QuickFill creates an account when you first enter a transaction that will post an entry to that account. For example, when you enter your first unpaid order, QuickFill creates an accounts receivable account.

Cash system vs. Accrual system

QuickFill maintains its internal ledger for two different accounting systems. We’ve labeled these systems “cash” and “accrual,” although, technically, both are accrual systems. Here’s the difference between the two: The “cash” system records income only when you receive a payment. The “accrual” system records income whenever you enter an order; it does not matter if the customer has paid for the order. However, both systems defer recognizing income until you actually serve issues. (That’s why they’re both, technically, accrual systems. A true cash system would recognize all income as soon as you received it.)

As you know, deferred subscription income represents a publisher’s obligation to serve future issues for a subscription. This obligation is reduced as you send each issue to the subscriber. Usually, this obligation to fulfill is identified on a balance sheet as “unearned subscription income” or “deferred subscription income.” In QuickFill we refer to it as deferred subscription income.
Now, here’s an example of how QuickFill’s accounting systems work:

Suppose you enter an unpaid new order with a term of 12 issues and a price of $120. QuickFill would record the following accounting entries in its internal ledger:

**Cash System:**
No entry  Because you’ve received no payment, QuickFill records no income.

**Accrual System:**

<table>
<thead>
<tr>
<th>Debit</th>
<th>Credit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Accounts receivable</td>
<td>$120</td>
</tr>
<tr>
<td></td>
<td>Deferred subscription income</td>
<td>$120</td>
</tr>
</tbody>
</table>

QuickFill debited your accounts receivable for $120, because the customer owes you that amount. But it has also credited you with $120 in deferred subscription income, because that is the price of this new subscription.

Now you run the ‘Issue labels’ update and serve the first issue for the order. Running the update causes QuickFill to record the following entries:

**Cash System:**
No entry  You still haven’t received any payment.

**Accrual System:**

<table>
<thead>
<tr>
<th>Debit</th>
<th>Credit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Deferred subscription income</td>
<td>Subscription income</td>
<td>$10</td>
</tr>
</tbody>
</table>

Because you’ve now served one issue, or 1/12 of the issues in the term, the accrual system debits your deferred subscription account 1/12 of the price, or $10, and it credits your subscription income account $10.

Now the customer sends in a check for $120, and you enter the payment. The ‘Payments’ transaction generates the following entries:

**Cash System:**

<table>
<thead>
<tr>
<th>Debit</th>
<th>Credit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash (PAYNC)</td>
<td>Deferred subscription income</td>
<td>$120</td>
</tr>
<tr>
<td>Deferred subscription income</td>
<td>Subscription income</td>
<td>$110</td>
</tr>
<tr>
<td></td>
<td>Subscription income</td>
<td>$10</td>
</tr>
</tbody>
</table>

**Accrual System:**

<table>
<thead>
<tr>
<th>Debit</th>
<th>Credit</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cash (PAYNC)</td>
<td>Accounts receivable</td>
<td>$120</td>
</tr>
</tbody>
</table>

QuickFill debits your cash account in both cases by the payment of $120. For the cash system, it credits to deferred subscription income $110, the amount
Accounting

Overview

that's still unearned. And it credits $10 to subscription income, because you’ve already earned this amount.

For the accrual system, the credit goes entirely to accounts receivable. That’s because you’ve already recorded the deferred subscription income and the subscription income.

(PAYNC means “payment of a new order by cash/check.”)

Account codes for a cash basis ledger:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAYxyy</td>
<td>Payment where “x” is N for new orders and R for renewal orders and “yy” is one of the following payment type codes:</td>
</tr>
<tr>
<td>C  = Cash or check</td>
<td></td>
</tr>
<tr>
<td>M  = MasterCard</td>
<td></td>
</tr>
<tr>
<td>MI = MasterCard (Internet)</td>
<td></td>
</tr>
<tr>
<td>V  = Visa</td>
<td></td>
</tr>
<tr>
<td>VI = Visa (Internet)</td>
<td></td>
</tr>
<tr>
<td>A  = American Express</td>
<td></td>
</tr>
<tr>
<td>AI = American Express (Internet)</td>
<td></td>
</tr>
<tr>
<td>D  = Discover</td>
<td></td>
</tr>
<tr>
<td>DI = Discover (Internet)</td>
<td></td>
</tr>
<tr>
<td>N  = Diner’s Club</td>
<td></td>
</tr>
<tr>
<td>NI = Diner’s Club (Internet)</td>
<td></td>
</tr>
<tr>
<td>W  = Wire transfer</td>
<td></td>
</tr>
<tr>
<td>T  = Transfer</td>
<td></td>
</tr>
<tr>
<td>F  = Claims paid</td>
<td></td>
</tr>
<tr>
<td>O  = Other</td>
<td></td>
</tr>
</tbody>
</table>

| SUBDC       | Deferred subscription income cash                                           |
| S_HDC       | Deferred shipping and handling cash                                         |
| TXCxxx      | Tax collected and owed to tax jurisdiction xxx                              |
| SUBECN or SUBECR | Subscription income cash new (or renewal)                                  |
| S_HECN or S_HECR | Shipping and handling cash new (or renewal)                                 |
| REF         | Refund liability                                                            |
Account codes for an accrual basis ledger:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAYxyy</td>
<td>Payment where “x” is N for new orders and R for renewal orders and “yy” is one of the following payment type codes:</td>
</tr>
<tr>
<td></td>
<td>C = Cash or check</td>
</tr>
<tr>
<td></td>
<td>M = MasterCard</td>
</tr>
<tr>
<td></td>
<td>MI = MasterCard (Internet)</td>
</tr>
<tr>
<td></td>
<td>V = Visa</td>
</tr>
<tr>
<td></td>
<td>VI = Visa (Internet)</td>
</tr>
<tr>
<td></td>
<td>A = American Express</td>
</tr>
<tr>
<td></td>
<td>AI = American Express (Internet)</td>
</tr>
<tr>
<td></td>
<td>D = Discover</td>
</tr>
<tr>
<td></td>
<td>DI = Discover (Internet)</td>
</tr>
<tr>
<td></td>
<td>N = Diner's Club</td>
</tr>
<tr>
<td></td>
<td>NI = Diner’s Club (Internet)</td>
</tr>
<tr>
<td></td>
<td>W = Wire transfer</td>
</tr>
<tr>
<td></td>
<td>T = Transfer</td>
</tr>
<tr>
<td></td>
<td>F = Claims paid</td>
</tr>
<tr>
<td></td>
<td>O = Other</td>
</tr>
<tr>
<td>A_RN or A_RR</td>
<td>Accounts receivable new (or renewal)</td>
</tr>
<tr>
<td>SUBDA</td>
<td>Deferred subscription income accrual</td>
</tr>
<tr>
<td>_HDA</td>
<td>Deferred shipping and handling accrual</td>
</tr>
<tr>
<td>TXCxxx</td>
<td>Tax collected and owed to tax jurisdiction xxx</td>
</tr>
<tr>
<td>TXUxxx</td>
<td>Tax receivable for tax jurisdiction xxx</td>
</tr>
<tr>
<td>SUBEAN or SUBEAR</td>
<td>Subscription income accrual new (or renewal)</td>
</tr>
<tr>
<td>S_HEAN or S_HEAR</td>
<td>Shipping and handling accrual new (or renewal)</td>
</tr>
<tr>
<td>WOA</td>
<td>Write-off amount</td>
</tr>
<tr>
<td>REF</td>
<td>Refund liability</td>
</tr>
</tbody>
</table>

Again, here’s the fundamental difference between the two methods: With the cash method, QuickFill records income only when you’ve actually received payment. The cash method assumes that your orders are actually “on approval”; the customer still has the right to cancel without paying you. That’s why QuickFill records no accounts receivable when you enter an order. The accrual method, by contrast, assumes that you have a firm order, for which the customer is genuinely obliged to pay.
Accounting

Overview

Using the cash method usually results in your recording slightly less income during the tax year. Why? Because QuickFill doesn’t record income for orders for which you haven’t yet received payment—even if you’ve served some issues for those orders.

You choose whether to use the accrual or the cash method on the company definition screen. The method you choose depends on many complex financial factors. You should discuss this decision with your accountant or financial adviser.

Internally, QuickFill keeps track of both sets of accounts at all times. So you can switch back and forth between them if you like. However, we don’t recommend it. Doing so is likely to affect your accounting; the posting file created from the journal extract as well as the account codes displayed on the ‘Account Codes’ screen will be different. In any case, it always makes sense to discuss potential changes with your accountant or financial adviser. Also, you should switch only after you’ve extracted the accounting journal (refer to the built-in help system for details on the journal extract).

**Using QuickFill’s accounting facility with your outside accounting system**

QuickFill records all accounting entries in batches (see chapter 7, Transactions, p. 7.21, for details on batches). It posts these accounting entries to QuickFill’s internal ledger whenever you

- Post a batch of new orders, payments, or renewals.
- Enter a miscellaneous transaction—that is, any transaction that is not a new order, payment, or renewal. QuickFill does not wait until you close the miscellaneous batch to post these entries. (However, it won’t create the batch report for these entries until you close the miscellaneous batch.)
- Run an update that has created journal entries. (QuickFill creates accounting batches when you run certain updates.)

The batch reports show you the details of the internal journal entries that QuickFill has posted (see chapter 7, Transactions, p. 7.27, for details on batch reports). These batch reports are part of your audit trail—that is, they help you trace the total amount posted to each account back through the individual batches to the original transactions. The ‘Accounting closing detail’ report is the other part of your audit trail. QuickFill generates this report—which summarizes all the accounting entries for the period you’re closing—when you select ‘Close period’ or ‘Close year’ under ‘Accounting’ on the main menu.

Now, here’s how you link QuickFill’s internal accounting facility to your outside accounting system. First, select ‘Account codes’ under ‘Accounting’ on the main menu and tell QuickFill which of its internal account codes correspond to the account numbers in your existing accounting system. That
way, QuickFill will produce reports and disk files with the correct account
numbers for your system.

Then, to actually post QuickFill’s accounting data to your outside accounting
system, select ‘Journal extract’ under ‘Accounting’ on the main menu. ‘Journal
extract’ creates a report—the ‘Accounting journal extraction’ report—that
shows the consolidated amounts you should post. (Typically, you’ll have to
post only 15 to 20 entries per publication.) It also creates a disk file.

You can then enter the data manually into your existing accounting system
from the printed report. Or, if your accounting system is able to “import”
journal entries—you might be able to use the disk file QuickFill creates. The
manual for your accounting software should have the information you need.
(Refer to the built-in help system for details on the journal extract and the
format of the file it creates.)

Note that if you only plan to post your accounting system when you close a
period in QuickFill, you do not need to run the ‘Journal extract’ as a separate
step—QuickFill does it for you as part of the ‘Close period’ and ‘Close year’
options on the ‘Accounting’ menu.

Whenever you plan to close a period or year, we strongly recommend that you
back up your database immediately before running ‘Close period’ or ‘Close
year’; this backup should be archived. After you close the period or year, you
should archive the reports created by ‘Close period’ or ‘Close year’. It is
especially important to archive the ‘Accounting detail’ report as it contains all
the detail for the period. Backing up your database and archiving these report
files will help to ensure the ability to go back and research them as necessary.
Let’s review the fields that affect QuickFill’s accounting system.

**Defining preferences** You will find the following fields on the ‘Batch reports’ tab of the ‘Preferences’ screen (see chapter 8, Definitions, p. 8.70) under ‘Definitions’ on the main menu.

- **Print batch reports when batch is closed**
  
  This field lets you choose whether the batch reports that are automatically produced when you post a batch of new orders, payments, renewals, or prospects should be printed immediately or saved for printing at a later time. If you elect not to print batch reports immediately, then select ‘Print...’ under ‘Reports’ on the main menu when you are ready to print the batch reports.

- **Include transaction log in batch reports**
  
  This field lets you choose whether or not you want to print the first section of the batch report. This section is a detailed accounting report. It shows you the types of transactions you entered and the amounts QuickFill credited or debited to each general ledger account for those transactions. It provides part of the audit trail you need to substantiate the entries QuickFill made in its internal ledger.

  The default for this item is to include a transaction log in each batch report. We recommend that you leave the entry this way until you are familiar and comfortable with the accounting data QuickFill provides.

- **Include customer list in new order batch reports**
  
  Here you choose whether you want to include the list of customer names in the reports for new order batches. This list can be a useful audit trail, especially if you ever need to reenter some batches.
Accounting

Selecting accounting policies & options

- Include payment report in batch reports

Select this field and QuickFill will include a list of all payments in each batch report. This list is useful when creating the deposit record for the bank.

**Defining companies**

You will find the following fields on the ‘Companies’ screen under ‘Definitions’ on the main menu. (Refer to the built-in help system for details on the ‘Companies’ screen.)

- Company code

QuickFill uses the code you enter here as part of the journal extract file name. You can’t leave the company code field blank, and you can’t enter blank spaces within the code.

- Accounting policy

QuickFill keeps track of all the data it needs for reporting on both a cash and an accrual basis. The entry you make in this field—either ‘C’ (cash) or ‘A’ (accrual)—determines which set of accounts QuickFill uses to create the posting file when you run the ‘Journal extract’. It also determines which set of accounts you see when you select ‘Account codes’ under ‘Accounting’ on the main menu. You can, however, run the ‘General ledger’ report on either a cash or an accrual basis, regardless of the entry you make in this field (refer to the built-in help system for more information on the ‘General ledger’ report).

**Remember:** Consult your accountant or financial adviser before you select or change a method.

- Accounting current year

In this field, you enter all four digits of your current fiscal year. This is the calendar year in which your fiscal year begins. For example, if your fiscal year runs from April 1, 1999, through March 31, 2000, your accounting year is 1999. When you select ‘Close year’ under ‘Accounting’ on the main menu, QuickFill automatically increases this date by a year. QuickFill uses the entry you make in this field on your accounting reports so you can tell to which year the data correspond. (Don’t worry about changing the year in this field if you need to; it doesn’t affect how QuickFill keeps its internal accounting records.)

- Accounting period

In this field, you enter the number of your current accounting period. If your fiscal year is the same as the calendar year, the accounting period is the current month—for example, December = 12. If your fiscal year runs from April through March, say, your accounting period for December
Accounting

Selecting accounting policies & options

would be “9.” (You can, of course, have as many or as few accounting periods as you like.) When you select ‘Close period’ under ‘Accounting’ on the main menu, QuickFill automatically increases this number by one. Again, QuickFill uses the entry you make in this field for reports only; it doesn’t affect QuickFill’s accounting.

After setting your initial accounting period and year, you never have to update the accounting year and accounting period fields on the company definition screen. QuickFill updates them automatically when you run the period- and year-end closings.

- Output format

This field is used to specify a file format for the journal extract file created by the ‘Journal extract’, ‘Close period’, or ‘Close year’ (on the ‘Accounting’ menu). The default format is ‘Comma-delimited’, but it can be changed to ‘dBASE’ or ‘Peachtree’ (for Peachtree Accounting 2003 software). (Refer to the built-in help system for a complete description of the journal extract file formats.

- Account separator

If you select the ‘Peachtree’ format in the ‘Output format’ field mentioned above, use this field to specify the publication code/account code separator that you would like QuickFill to use when creating journal extract files for this company. If you leave this field blank, the publication code and account code will be joined without any spaces or characters between them. For example, if the publication code in your database for accounts receivables from new orders is “1000” and the account code is “1100,” the record, in your journal extract file, for accounts receivables from new orders will contain “10001100” in the publication code/account code field. If you use a separator of “$” instead, the record, in your journal extract file, for accounts receivables from new orders will contain “1000$1100” in the publication code/account code field.

The ‘Acct separator’ field only applies to the ‘Peachtree’ format.

- Create GL accounts automatically

If you check this field, QuickFill will create all of the appropriate general ledger accounts whenever you define a new publication or click “OK” on the definition screen of an existing publication. This is useful when you post the numbers in QuickFill’s ledger to an external accounting system and you want to avoid waiting until the end of the period to fill in the account codes for the external system. If you leave this box unchecked QuickFill will create the general ledger accounts “on demand” whenever a transaction is entered or an update is run that requires posting a number in that account.
Journal entries

When you enter transactions and run updates, depending on the transaction or update, QuickFill makes journal entries into the general ledger.

The following transactions produce journal entries:

- New orders
- Payments
- Renewals
- Cancels
- Reinstates
- Group change
- Extension
- Bounced payment
- Transfer payment
- Refund
- Remove order
- Adjustments

QuickFill records the batch transactions—new orders, payments, and renewals—on separate batch reports. You’ll see one journal entry for each transaction. QuickFill records the remaining transactions in a miscellaneous batch report.

Examples of cash accounting system journal entries posted by transactions you enter:

**Unpaid new order**

- No journal entry

**Paid new order**

- `Db PAYNC` Payments new orders cash $126.00
- `Cr SUBDC` Deferred subscription income $120.00
- `Cr TXCMA` Sales tax collected, Massachusetts $6.00

**Unpaid renewal**

- No journal entry

**Paid renewal**

- `Db PAYRC` Payments for renewals cash $120.00
- `Cr SUBDC` Deferred subscription income $120.00
Accounting

Journal entries

Cancel refund of full amount

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Db</td>
<td>SUBDC</td>
<td>Deferred subscription income</td>
</tr>
<tr>
<td>Db</td>
<td>SUBECR</td>
<td>Subscription income renewal</td>
</tr>
<tr>
<td>Cr</td>
<td>REFUND</td>
<td>Refunds</td>
</tr>
</tbody>
</table>

Bounced payment

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Db</td>
<td>SUBDC</td>
<td>Deferred subscription income</td>
</tr>
<tr>
<td>Db</td>
<td>SUBECR</td>
<td>Subscription income renewal</td>
</tr>
<tr>
<td>Cr</td>
<td>PAYRC</td>
<td>Payments from renewals cash</td>
</tr>
</tbody>
</table>

Examples of accrual accounting system journal entries posted by transactions you enter:

Unpaid new order

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Db</td>
<td>A_RN</td>
<td>Accounts receivable new</td>
</tr>
<tr>
<td>Cr</td>
<td>SUBDA</td>
<td>Deferred subscription income accrual</td>
</tr>
<tr>
<td>Cr</td>
<td>TXUMA</td>
<td>Sales tax uncollected, Massachusetts</td>
</tr>
</tbody>
</table>

Payment for above order

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Db</td>
<td>PAYNC</td>
<td>Payment new order cash or check</td>
</tr>
<tr>
<td>Db</td>
<td>TXUMA</td>
<td>Sales tax uncollected, Massachusetts</td>
</tr>
<tr>
<td>Cr</td>
<td>A_RN</td>
<td>Accounts receivable from new orders</td>
</tr>
<tr>
<td>Cr</td>
<td>TXCMA</td>
<td>Sales tax collected, Massachusetts</td>
</tr>
</tbody>
</table>

New order entered with payment

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Db</td>
<td>PAYNC</td>
<td>Payments new orders cash</td>
</tr>
<tr>
<td>Cr</td>
<td>SUBDA</td>
<td>Deferred subscription income</td>
</tr>
<tr>
<td>Cr</td>
<td>TXCMA</td>
<td>Sales tax collected, Massachusetts</td>
</tr>
</tbody>
</table>

Unpaid renewal

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Db</td>
<td>A_RR</td>
<td>Accounts receivable renewals</td>
</tr>
<tr>
<td>Cr</td>
<td>SUBDA</td>
<td>Deferred subscription income</td>
</tr>
<tr>
<td>Cr</td>
<td>TXUMA</td>
<td>Sales tax uncollected, Massachusetts</td>
</tr>
</tbody>
</table>

Payment for above renewal

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Db</td>
<td>PAYRC</td>
<td>Payments renewal cash or check</td>
</tr>
<tr>
<td>Db</td>
<td>TXUMA</td>
<td>Sales tax uncollected, Massachusetts</td>
</tr>
<tr>
<td>Cr</td>
<td>A_RR</td>
<td>Accounts receivable from renewals</td>
</tr>
<tr>
<td>Cr</td>
<td>TXCMA</td>
<td>Sales tax collected, Massachusetts</td>
</tr>
</tbody>
</table>
## Accounting

### Journal entries

**Renewal entered with payment**

<table>
<thead>
<tr>
<th>Db</th>
<th>PAYRC</th>
<th>Payments renewals cash</th>
<th>$75.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cr</td>
<td>SUBDA</td>
<td>Deferred subscription income</td>
<td>$75.00</td>
</tr>
</tbody>
</table>

**Cancel of a renewal order**

<table>
<thead>
<tr>
<th>Db</th>
<th>SUBDA</th>
<th>Deferred subscription income</th>
<th>$75.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cr</td>
<td>A_RR</td>
<td>Accounts receivable renewal</td>
<td>$75.00</td>
</tr>
</tbody>
</table>

**Bounced payment**

<table>
<thead>
<tr>
<th>Db</th>
<th>A_RN</th>
<th>Accounts receivable new</th>
<th>$75.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cr</td>
<td>PAYNC</td>
<td>Payments new orders</td>
<td>$75.00</td>
</tr>
</tbody>
</table>

### Updates that produce journal entries

All of the updates produce at least a summary batch report that shows the number of bills or notices produced. The billing, issue labels, renewal, refund, trial subscription, and two of the purge updates can also produce journal entries. QuickFill includes the details for these entries in the update batch reports.

### Billing update

Normally, when you run the billing update, you get only summary entries that show the number of bills produced for each publication. However, you also get journal entries when the following occurs during the billing update:

- **Write-off**
  
  The A_R (accounts receivable or amount due) for an order is less than the minimum billing amount you specified on the publication definition billing tab. QuickFill writes off the A_R.

  **Example:** A_R before you ran the billing update was $4.00. You increase your minimum billing amount for the publication from $3.00 to $5.00 and then run the billing update.

<table>
<thead>
<tr>
<th>Db</th>
<th>WOA</th>
<th>Write-off amount</th>
<th>$4.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cr</td>
<td>A_RN</td>
<td>Accounts receivable new</td>
<td>$4.00</td>
</tr>
</tbody>
</table>

- **Cancel for nonpayment**
  
  An order reaches the “cancel for nonpayment” point. QuickFill prorates the price of the order based on the number of issues you served. Then it writes off the remaining amount due.

  **Example (accrual system):**

  Original price of order: $48.00
  Payment received: $10.00
  Original term: 12
Accounting

Journal entries

You served 5 of 12 issues when the cancel point is reached.

Before running the billing update, the values in the accounts were:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAYNC</td>
<td>Payment new order cash or check</td>
<td>$10.00</td>
</tr>
<tr>
<td>A_RN</td>
<td>Accounts receivable new</td>
<td>$38.00</td>
</tr>
<tr>
<td>SUBEAN</td>
<td>Subscription income accrual new</td>
<td>$20.00</td>
</tr>
<tr>
<td>SUBDA</td>
<td>Deferred subscription income accrual</td>
<td>$28.00</td>
</tr>
</tbody>
</table>

Journal entry created by the billing update:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cr A_RN</td>
<td>Accounts receivable new</td>
<td>$38.00</td>
</tr>
<tr>
<td>Db SUBDA</td>
<td>Deferred subscription income accrual</td>
<td>$28.00</td>
</tr>
<tr>
<td>Db WOA</td>
<td>Write-off amount</td>
<td>$10.00</td>
</tr>
</tbody>
</table>

Issue labels update

When you run the ‘Issue labels’ update, QuickFill produces a single “summarized” journal entry for each publication for which you serve issues. (That is, if you serve 7,000 issues, one journal entry contains the accounting for all of them. You don’t get 7,000 separate entries.)

Example:

<table>
<thead>
<tr>
<th>Account</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Db SUBDA</td>
<td>Deferred subscription income accrual</td>
<td>$1,020.32</td>
</tr>
<tr>
<td>Db S_HDA</td>
<td>Deferred shipping &amp; handling accrual</td>
<td>$15.20</td>
</tr>
<tr>
<td>Cr SUBEAN</td>
<td>Subscription income accrual new</td>
<td>$286.25</td>
</tr>
<tr>
<td>Cr S.HEAN</td>
<td>Shipping &amp; handling accrual new</td>
<td>$2.65</td>
</tr>
<tr>
<td>Cr SUBEAR</td>
<td>Subscription income accrual renewal</td>
<td>$734.07</td>
</tr>
<tr>
<td>Cr S.HEAR</td>
<td>Shipping &amp; handling accrual renewal</td>
<td>$12.55</td>
</tr>
</tbody>
</table>

If your publication policy is to send a bill with the first issue, and the amount due is less than the minimum billing amount you specified on the publication definition billing tab, the ‘Issue labels’ update produces the same journal entry we described under “Write-off” for the billing update.

If you are using “by issues” renewal series, and you are using the automatic renewal feature of the renewal series, the ‘Issue labels’ update will also generate journal entries that reflect the automatic creation of renewal orders.

Renewal notices update

Running the ‘Renewal notices’ update normally produces only summary entries that show the number of notices produced for each publication. However, if you are using the automatic renewal feature of the renewal series, the ‘Renewal notices’ update will also generate journal entries that reflect the automatic creation of renewal orders. These journal entries are similar to those created for unpaid renewals. Refer to “Auto renewal” in the built-in help system’s index for details on QuickFill’s automatic renewal feature.
Refunds update

Running the ‘Refunds’ update produces journal entries under the following circumstance: You have set your publication policy to automatically refund credit balances (see chapter 8, Definitions, p. 8.43, for details on setting your refund policy), and the credit balance on one or more orders is less than the amount you specified on the publication definition billing tab as the minimum amount you want to automatically refund.

Example: The credit balance before running the ‘Refunds’ update was $4.00. You decreased the minimum automatic refund amount from $5.00 to $3.00.

Under these conditions, running the update produces the following entry:

```
Db   A_RN  Accounts receivable new $4.00
Cr   REF   Refund liability $4.00
```

Trial subscriptions update

This update produces a journal entry for each subscription created. If the subscriptions are free trials (you specified on the filter screen a tracking code that is linked to an offer with a zero price), then there will be no accounting effects and you will get only a list of the order numbers created. However, if you used a tracking code that is linked to an offer with a nonzero price, then the update will generate journal entries similar to those for new orders.

Purge updates

The ‘Purge expired subscriptions’ and the ‘Purge history orders’ updates are the only purge updates that can have any accounting effects. Purging an expired subscription or a history order only has an accounting effect when the order has a credit balance or a balance due that has not yet been written off. (The latter is very rare since the billing update writes off any balance due at the end of the series.) Credit balances are transferred to the earned income account. Any balance due is written off.

Example: An expired subscription has a credit balance of $20.00. You run the ‘Purge expired subscriptions’ update which produces the following journal entry:

```
Db   A_RR  Accounts receivable, renewals $20.00
Cr   SUBEAR  Earned subscription income, renewals $20.00
```
Chapter 12

Other commands

- Other menu
- Exports
  - Overview of exports
  - Running exports
- Imports
  - Overview of imports
  - Running imports
The Other menu offers the following commands:

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>External Command</td>
<td>Use this menu item to run a command, program, or batch file from within QuickFill.</td>
</tr>
<tr>
<td>Customize Toolbar</td>
<td>Use ‘Customize toolbar’ to change the tool bar.</td>
</tr>
<tr>
<td>Change password</td>
<td>Use this command to change the password you use to log in to QuickFill.</td>
</tr>
<tr>
<td>Window size</td>
<td>Changes the QuickFill window size to make better use of your screen. Three sizes are available.</td>
</tr>
<tr>
<td>Imports</td>
<td>Provide the ability to import subscriptions, prospects, customer data, and transactions from a dBASE file. See p. 12.8 for an overview of imports.</td>
</tr>
<tr>
<td>Subscription Import</td>
<td>Use this command to import subscription data into your database.</td>
</tr>
<tr>
<td>Prospect Import</td>
<td>Use this command to import prospect names into your database.</td>
</tr>
<tr>
<td>Customer Data Import</td>
<td>Use the ‘Customer Data Import’ to update existing customers’ name, address, and demographic data.</td>
</tr>
<tr>
<td>Requalification import</td>
<td>Use this command to import controlled requalifications into your database from a dBASE file.</td>
</tr>
<tr>
<td>Transaction Import</td>
<td>The transaction import is an optional extra-cost module that provides the ability to import new orders, renewals, payments, address changes,</td>
</tr>
</tbody>
</table>
Other commands

other menu

controlled subscriptions, and requalifications from a dBASE file into your database. This menu item only appears on the ‘Other’ menu in the demo system or if your system includes the transaction import module. For more information on the pricing for the ‘Transaction import’, please contact CWC Software, Inc.

Exports

Provide the ability to export subscriptions, prospects, and customer data from QuickFill. See p. 12.4 for an overview of exports.

Subscription Export

The subscription export is used to produce files that contain your customers’ subscription data (i.e., order dates, status, payments, etc.).

Subscription Export Using Qualification Filter

Selects subscribers based on audit data. This version of the subscription export may only be accessed from the audit system.

Prospect Export

The prospect export is used to produce files that contain data for your prospects.

Customer Export

The customer export is used to produce files that contain customer data that you use when you need computer readable addresses instead of printed labels.

Customer Export Using Qualification Filter

Selects customers based on audit data. This version of the customer export may only be accessed from the audit system.

Refer to the built-in help system for more information on any of the above menu items.
Other commands

Overview of exports

Exports

QuickFill contains a ‘Subscription export’, ‘Customer export’, and ‘Prospect export’ for creating files with subscriptions, customer, and prospect data respectively. These files are useful if you want to interface with other computers. Say, for example, a magazine wants to rent your list but needs it on tape. You’d send the publication a disk with these files on it. The files would contain all the information the list renter needs. Or, say you rent a list and want to eliminate your own customers from it. You’d send the rented list and this disk to a service bureau, which could then easily purge your subscribers from the rented list.

Use this export to produce files with complete data for the subscriptions in your database including order dates, statuses, payments, and so forth. This is useful if you wish to perform some type of analysis on the data that is not provided by one of the standard QuickFill reports. You might also use it if you have sold a publication to another publisher and want to send them the subscriber file.

The filter for ‘Subscription export’ looks almost the same as the one for ‘Customer export’, but it actually differs in a subtle way. The customer export filter is intended to select customers that subscribe to one of your publications or that are members of one of your promotional lists—it does not provide any information about the subscriptions held by those customers. The subscription export is intended to select subscriptions, although it can include the customer address as part of the subscription data.

Say that Mr. Smith subscribes to publications PUB1 and PUB2. If you run the customer export and ask for subscribers to publications for PUB1 or PUB2 you will get only one copy of Mr. Smith’s address. However, if you run the subscription export and ask for subscriptions to PUB1 or PUB2, you will get two records for Mr. Smith—one for each publication.

Use the ‘Prospect export’ to export complete data for the prospects in your database. This is useful if you wish to perform some type of analysis on the data that is not provided by one of the standard QuickFill reports.

Like the ‘Subscription export’ filter, the ‘Prospect export’ filter differs from the ‘Customer export’ filter in a subtle way. As mentioned on the previous page, the customer export filter is intended to select customers that subscribe to one
Other commands

Overview of exports

of your publications or that are members of one of your promotional lists—it
does not provide any information about the lists to which those customers
belong. The prospect export is intended to select prospect records, although it
will include the customer address as part of the prospect data.

Say that Mr. James is a prospect on lists LIST1 and LIST2. If you run the
customer export and ask for customers to LIST1 or LIST2 you will get only one
copy of Mr. James’ address. However, if you run the prospect export and ask
for prospects for LIST1 or LIST2, you will get two records for Mr. James—one
for each list.

Customer export
Use this export to produce files that contain the label data and/or other
customer data that you use when you need computer readable addresses
instead of printed labels. You can also use these files with your word
processor to produce mail-merge promotional letters.

Refer to “Formats” in the built-in help system’s index for a detailed listing of
the fields in each of the formats listed below.

Subscription export
Each of the formats available for the ‘Subscription export’ (comma-delimited
and dBASE) contains the same fields in the same order.

Prospect export
Each of the formats available for the ‘Prospect export’ (comma-delimited and
dBASE) contains produce the same fields in the same order.

Customer export

dbase file with formatted address

dbase file with unformatted address

dbase for National Change of Address Service

The ‘dBASE for National Change of Address Service’ file format is intended
for sending to the National Change of Address Service for address correction
or addition of Zip+4 codes.

Mail merge with formatted address
Mail merge with unformatted address

These two formats contain the field delimiters entered on the ‘Mail merge’ tab
of the “Preferences” screen. If you are using a comma as a field delimiter, the
data in any field that happens to contain a comma will be enclosed in quotes
(“) to show that it is actually a single field. The first record in the file created
contains names of the fields in each record.

Comma-delimited with formatted address
Comma-delimited with unformatted address

These two formats are the same as “mail merge,” except that commas are
placed between the fields instead of the field delimiters entered on the
‘Preferences’ screen. If the data in any field happens to contain a comma, then
Other commands

Overview of exports

it will be enclosed in quotes (") to show that it is actually a single field. The first record in the file created contains names of the fields in each record.

*Fixed length .SDF file with formatted address*

*Fixed length .SDF file with unformatted address*

This file format contains no field separators and each field is the same length in every record.

*PostWare/ArcList postal presort*

This is a dBASE file format that is intended for use with postal presort packages. The file format is the same as that produced by the ‘Label splitter’ and by the ‘Issue labels’ update when you check any of the ‘Presort’ boxes on the ‘Shipping’ tab of the publication definition screen, except that the fields relating to subscriptions and orders are omitted.

*Note: Formatted address vs. unformatted address*

The difference between the formatted address formats and the unformatted address formats is that in the unformatted address formats the label line fields are replaced by the individual customer address fields.

Refer to the built-in help system for more details on the ‘Customer export’, ‘Prospect export’, and ‘Subscription export’.
Running exports

After you have filled out the filter screen for an export, click on “OK,” and the screen below will appear:

![QuickFill for Windows dialog box](image)

When do you want to run this job?

- Run it now (not recommended for multi-user systems)
- Run it with tonight’s jobs
- Save to existing job list
- Create a new job list

This is the same screen that appears when you click on “OK” on a report filter. (See chapter 10, Reports, p. 10.16, for details.)
Other commands

Overview of imports

Imports

QuickFill includes two menu items by which customer records may be imported into your database—'Subscription import' and 'Prospect import'. It also provides you with a menu item, 'Customer data import', by which you can import customer data to update information for existing customers and a 'Requalification import', by which you can import controlled requalifications.

Subscription import

Use the 'Subscription import' to import subscription data into your database. Refer to “How to import subscriptions” in the built-in help system for instructions on how to create a subscription import file with the proper format.

Prospect import

The 'Prospect import' may be used to create customer records for prospective subscribers (such as the people on a list that you rented, etc.). For more information on prospects, refer to “Overview of prospects” in the built-in help system. Refer to “How to import prospects” in the built-in help system for instructions on how to create a prospect import file with the proper format.

Customer data import

The ‘Customer data import’ may be used to add or change the following fields in customers’ records (these fields are in the “dBASE with unformatted address” output file created by QuickFill’s ‘Customer export’):

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PREFIX</td>
<td>First name prefix</td>
</tr>
<tr>
<td>FNAME</td>
<td>First name</td>
</tr>
<tr>
<td>LNAME</td>
<td>Last name</td>
</tr>
<tr>
<td>SUFFIX</td>
<td>Middle name suffix</td>
</tr>
<tr>
<td>SALUTATION</td>
<td>Salutation</td>
</tr>
<tr>
<td>SEX</td>
<td>Sex</td>
</tr>
<tr>
<td>TITLE</td>
<td>Title</td>
</tr>
<tr>
<td>COMPANY</td>
<td>Company</td>
</tr>
<tr>
<td>DEPT</td>
<td>Department</td>
</tr>
<tr>
<td>STREET1</td>
<td>Street 1</td>
</tr>
<tr>
<td>STREET2</td>
<td>Street 2</td>
</tr>
<tr>
<td>ZIP</td>
<td>Zip code</td>
</tr>
<tr>
<td>ZIP2</td>
<td>Secondary zip code</td>
</tr>
<tr>
<td>CARRT</td>
<td>Carriage</td>
</tr>
<tr>
<td>CNTRYCODE</td>
<td>Country code</td>
</tr>
<tr>
<td>COUNTRY</td>
<td>Country</td>
</tr>
<tr>
<td>TAXJR</td>
<td>Tax registration</td>
</tr>
<tr>
<td>PHONE</td>
<td>Phone number</td>
</tr>
<tr>
<td>FAX</td>
<td>Fax number</td>
</tr>
<tr>
<td>EMAIL</td>
<td>Email address</td>
</tr>
<tr>
<td>USERID</td>
<td>User ID</td>
</tr>
<tr>
<td>PASSWORD</td>
<td>Password</td>
</tr>
<tr>
<td>TAXABLE</td>
<td>Taxable</td>
</tr>
<tr>
<td>RENTPOSTAL</td>
<td>Rent postal</td>
</tr>
<tr>
<td>RENTEMAIL</td>
<td>Rent email</td>
</tr>
<tr>
<td>RENTPHONE</td>
<td>Rent phone</td>
</tr>
<tr>
<td>RENTFAX</td>
<td>Rent fax</td>
</tr>
<tr>
<td>BADSEED</td>
<td>Bad seed</td>
</tr>
<tr>
<td>DEMCODEA</td>
<td>Demographic code A</td>
</tr>
<tr>
<td>DEMCODEB</td>
<td>Demographic code B</td>
</tr>
<tr>
<td>DEMCODEC</td>
<td>Demographic code C</td>
</tr>
<tr>
<td>DEMCODED</td>
<td>Demographic code D</td>
</tr>
<tr>
<td>DEMDATA1</td>
<td>Demographic code 1</td>
</tr>
<tr>
<td>DEMDATA2</td>
<td>Demographic code 2</td>
</tr>
<tr>
<td>CREATEDATE</td>
<td>Creation date</td>
</tr>
<tr>
<td>POSTALDATE</td>
<td>Postal date</td>
</tr>
<tr>
<td>EMAILDATE</td>
<td>Email date</td>
</tr>
<tr>
<td>PHONEDATE</td>
<td>Phone date</td>
</tr>
<tr>
<td>FAXDATE</td>
<td>Fax date</td>
</tr>
<tr>
<td>CASSDATE</td>
<td>Cass date</td>
</tr>
</tbody>
</table>

The import file for the ‘Customer data import’ must contain a customer number field, “CUSTNUM.” QuickFill uses this field to determine the customer records that should be updated. Only the fields that are present in the input file are updated.

Requalification import

Use the ‘Requalification import’ to import controlled requalifications for an audited publication from a dBASE file into your database. Refer to “How to import requalifications” in the built-in help system for instructions on how to create a requalification import file with the proper format.

12.8 QuickFill
Other commands

Overview of imports

*Note:* It is important to remember that you should always back up your database before importing subscriptions, prospects, customer data, or requalifications. This is a precautionary step to help prevent the loss of data if the import fails.

The customer fields (first name, last name, etc.) are the same for the above imports as they are for the customer and subscription exports. Refer to the built-in help system for more details on the ‘Subscription import’, ‘Prospect import’, ‘Customer data import’, and ‘Requalification import’.
Other commands

Running imports

Running imports

After you have filled out the filter screen for the subscription or prospect import, click on “OK,” and the screen below will appear:

![QuickFill for Windows dialog box](image)

**QuickFill for Windows**

When do you want to run this import?

- Run it now
- Run it with tonight’s jobs
- Save to existing job list
- Create a new job list

**Run it now**

This option only applies to the subscription, prospect, and requalification imports. Select ‘Run it now’ if you would like to run your subscription, prospect, or requalification import immediately. For the subscription and prospect imports you must be in single user mode in order to use “Run it now.”

**Note: Customer data import**

When running the ‘Customer data’ import, the ‘Run it now’ option is replaced by ‘Run it now exclusively, only lookup allowed’. For more information on this option, see chapter 9, *Updates*, p. 9.55.

**Run with tonight’s jobs**

For information on these three options, see chapter 10, *Reports*, p. 10.17.

**Save to existing job list**

**Create a new job list**
Chapter 13

Jobs

- Jobs menu
- Overview
The items on the ‘Jobs’ menu allow you to create and edit queues with jobs (such as reports, updates, exports, and imports) that you would like to run together at a later time. The advantage of using job lists is that you can save and re-use the filter selections for reports, updates, and other jobs. This allows you to run the same reports the same way daily, weekly, monthly, etc. For example, if you run the same reports at the end of each week, you can create a job list (you might call it “Week’s end”) and schedule those reports, using a date range of “Current week,” to run as part of that list. Then, at the end of each week, run the “Week’s end” job list to create the scheduled reports with data from the Sunday through Saturday of the current week.

The Jobs menu offers the following commands:

**Edit Job lists**
Use this menu item to create a new job list or change or delete an existing job list. This menu item is also used to run job lists as well as to schedule job lists to begin running at a specific time.

**Run tonight’s jobs**
Use this menu item to begin running the “Tonight’s jobs” job list.

**Run tonight’s jobs (delayed)**
Use this menu item to schedule the time at which you would like the “Tonight’s jobs” job list to begin running.
Job lists

The ‘Jobs’ menu items allow you to create and edit lists of jobs (reports, updates, exports, and imports) that you would like to run together.

QuickFill has one pre-defined job list named “Tonight’s jobs.” Batches that you choose to “Post later” are automatically added to this job list. You can also add any reports, updates, exports, and imports that you would like to run at the end of the day to this job list. When you run “Tonight’s jobs,” as each job is completed it is removed from the list. This automatic removal only applies to the “Tonight’s jobs” job list.

You can save and re-use the filter selections for reports, updates, and other jobs by creating your own job list(s). This feature is helpful because it allows you to run the same reports the same way daily, weekly, monthly, etc. For example, if you run the same reports at the end of each week, you can create a job list (you might call it “Week’s end”) and schedule those reports, using a date range of “Current week,” to run as part of that list. Then, at the end of each week, run the “Week’s end” job list to create the scheduled reports with data from the Sunday through Saturday of the current week. Because the reports are not being run as part of “Tonight’s job,” QuickFill will not remove them from the job list after they are run.

Note: the sequence of items on the “Tonight’s jobs” job list
QuickFill always places batches waiting to be posted ahead of any updates or reports. The reports and updates are placed at the end of the job list in the order that you schedule them. You can change the sequence in which any of the batches, updates, or reports will be run by using the “Move up” and “Move down” buttons.

You can open the ‘Job lists’ screen by selecting ‘Edit Job lists’ from the ‘Jobs’ menu or by clicking on the ‘Edit Job lists’ toolbar button—. When you open this screen, you will see the “New,” “Change,” “Delete,” “Run,” and “Run later” options below the “Job List” box.

New Click on “New” to create a new job list. For example, you might add a job list titled “Month’s end” for reports that you would like to run at the end of each month. When you select “New,” QuickFill displays a blank ‘Job lists’ screen so that you can define your new job list.
Jobs

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*Change*  Select a job list and click on "Change" to view or change its contents. For example, you may have forgotten what reports you have scheduled for a particular job list.

*Delete*  Select a job list and click on "Delete" to remove it. Before deleting a job list, QuickFill displays the items contained on the list and asks you to confirm that you would like to delete it. (Note, you cannot delete the “Tonight’s jobs” job list.)

*Run*  Select a job list and click on “Run” to start running it. (For information on running tonight’s jobs from a command line, see the “How to” section of the built-in help system.)

Once you start running a job list, each of the jobs on it are executed in turn, producing the same report files that would have been produced if they had been run in “run now” mode. The reports are not printed—you must use ‘Print...’ on the reports menu to print them at the end of the run.

*Note: “Tonight’s jobs”*

Remember, as each job is completed it is removed from the “Tonight’s jobs” job list. If you would like to save a job(s), you should not schedule it to run as part of “Tonight’s jobs.” Instead, create a separate job list(s) for it.

At the end of the run you can print a list of the jobs that were run by selecting ‘Print...’ from the reports menu and printing the ‘Scheduled Update Run Report’. This report shows you how long each job took to run as well as a status for each job. This information is especially helpful when trying to determine how much time to allow for a backup or an update.

*Note: multiuser systems*

If you select “Run” in a multiuser system, QuickFill will check to see if there are any other users signed on to the system; if there are, they must be in ‘Lookup-only’ mode in order for the job list to run. A user may change over to the ‘Lookup-only’ mode by selecting ‘Lookup only’ from the ‘File’ menu. Users with passwords that give them access to nothing but the lookup function are automatically in ‘Lookup-only’ mode.

*Run later*  Select a job list and click on “Run later” to schedule a specific time at which you would like to begin running that job list.

*Incompletely posted batches*

Sometimes QuickFill will detect problems in a batch that it is posting as part of a scheduled update. When this happens, QuickFill skips over the offending items and leaves the batch on the list of unposted batches. On the ‘Scheduled
Update Run Report’ it shows the number of items that were not posted. You should go back into the batch and look at the list of unposted items that remain. Next to each unposted item will be an error message. You should correct each item by clicking the ‘Change’ button and fixing the problem, or you can delete the item by clicking the ‘Delete’ button. When you have fixed all the errors, repost the batch.

**Database check**

It is a good idea to run the database check as part of your scheduled update run on a regular basis. That way you will know if something has corrupted the database before you have invested many days of work doing data entry. It is best to schedule the database check as the first item in the job list, because if the database check discovers a problem in the database it automatically stops the job list. (The ‘Scheduled Update Run Report’ will display a status of “Database check failed!” If this occurs you should contact Technical Support at CWC Software, Inc. immediately.) There isn’t any point in running a report or update on a database that is corrupt. See chapter 6, *File commands*, p. 6.4, for details on the database checker.

The following items appear after selecting the “New” or “Change” options for a job list.

- **Job list**: The name of the job list currently displayed.
- **Shut down QuickFill at end of run**: Check this field if you would like QuickFill to automatically shut down after all of the items on this job list have been run.
- **Move up, Move down**: Use these buttons to change the order in which the jobs on your job list are run. You must first click once on the item you would like to move and then click on the “Move up” or “Move down” button until the item is in the desired position. (QuickFill will run items in a job list from top to bottom.)

For example, let’s say that you scheduled a label update, billing update, renewal update, and database check to run as part of the job list displayed. After thinking this through, you realize that you should run your database check first to make sure your database does not contain any errors. After all, there is no point in trying to run updates on a corrupt database. To move the database check to the top of the job list, click once on ‘Database check’, click on “Move up” until this item is at the top of your job list, and then click on “OK.” (Now you have insured that your updates will not run on a corrupt database. If the database check finds any errors, QuickFill will not run the rest of the items on the job list.)

- **Add job**: Click on this button to see a list of the jobs scheduled on all of your job lists. This option allows you to add a job from another job list onto the job list.
Jobs

Overview

currently displayed. If your job list already contains some jobs, the job you add will be inserted immediately below the job the cursor was on before you clicked on “Add job.”

For example, let’s say that you have two job lists, “Tonight’s jobs” and “Custom job.” “Tonight’s jobs” contains a database check, a ‘New order revenue’ report, a ‘Renewal revenue’ report, and a ‘Promotional labels’ report and “Custom job” is empty. You decide that you would like to run the ‘Promotional labels’ report as part of “Custom job” instead of “Tonight’s jobs.”

Seeing that the report filter for the ‘Promotional labels’ report has already been filled in, there’s no reason to delete it from “Tonight’s jobs,” go back to the ‘Promotional labels’ report, fill in the filter again, and then schedule the report to run with “Custom job.” Instead, you can move the ‘Promotional labels’ report from one job list to another without having to re-enter your filter selections. To do this, you click on “Change” for “Custom job,” then click on “Add job,” and select the ‘Promotional labels’ report that is scheduled to run with “Tonight’s jobs.” After making this change, you can delete the ‘Promotional labels’ report from “Tonight’s jobs.”

Add job list If you would like to add all of the jobs scheduled to run as part of another job list onto the job list that is currently displayed, click on “Add job list” and select the appropriate list. If your job list already contains some jobs, the job list you add will be inserted immediately below the job the cursor was on before you clicked on “Add job list.”

This option is useful if you have reports that you run weekly, but also like to run for a one-day period (perhaps with “Tonight’s jobs”) from time to time. For example, let’s say that you have a job list titled “Weekly job” and it contains an ‘Order history report’, a ‘New order revenue’ report, and a ‘Renewal revenue’ report. You decide that you would like to see the information from these reports, but only for the entries that were made today. To do this, you can create a new job list titled “Special job,” click on “Add job list,” select “Weekly job” to copy all of these reports to “Special job,” and then change the filter (see “Change filter” below) for each of these reports so that the date range specified only covers today instead of a one-week period.

Change filter Use “Change filter” to view or change the filter selections for a job (report, update, export, etc.). To use this option, click once on the item whose filter you would like to change and then click on “Change filter.” Once the filter for the item is displayed, you can make the desired changes and then click on “OK” to save them.

This feature is helpful when you want to double check information (such as a date range) you entered on a filter or when you have copied a job from another job list and wish to change some of the filter selections for it.

13.6 QuickFill
Jobs

Overview

Note: changing or deleting unposted batches
You cannot change or delete an unposted batch from the “Job lists” screen. Instead, you must access the batch by selecting the appropriate transaction from the ‘Transactions’ menu and then selecting the batch from the “Unposted batches” screen.

Replicate job
Click on “Replicate job” to display a copy of the job (report, update, export, etc.) that the cursor is on. This is helpful when trying to run the same report with minor variations (different publications, marketing plans, etc.) to the filter. Instead of entering information on the report filter for each variation, you can enter it once, schedule it to run as part of a job list, select the ‘Edit Job lists’ menu item, “Change” the job list, and then use “Replicate job” to create multiple versions of the same report.

For example, let’s say you have scheduled the ‘Promotional labels’ report to run for a group of prospects linked to the “SHW0405” list. Later on, you are asked to run another set of promotional labels using the same criteria for the prospects linked to the “SHW0407” list. You simply go to the job list under which you scheduled the promotional labels, click on the ‘Promotional labels’ job, and click on ‘Replicate job.’ A copy of the ‘Promotional labels’ report filter for the first set of prospects (“SHW0405”) is displayed and you can change your prospect list from “SHW0405” to “SHW0407” and then click on “OK.” When the message box asking when you would like the job to be run appears, select “Save to existing job list X” (“X” is replaced by the name of the job list on which you are working) and then click on “OK.” Your job list now contains two ‘Promotional labels’ reports, one for the “SHW0405” prospects and one for the “SHW0407” prospects.

Delete job
Use “Delete job” to remove a job (report, update, export, etc.) from the list that is currently displayed. When you select “Delete job,” QuickFill displays the filter for the job and asks you to confirm that you would like to delete it.

Note: changing or deleting unposted batches
You cannot change or delete an unposted batch from the “Job lists” screen. Instead, you must access the batch through by selecting the appropriate transaction from the ‘Transactions’ menu and then selecting the batch from the “Unposted batches” screen.
Chapter 14

Printing

- Overview
- Page setup
- Labels
- Forms
  - Bills and renewals
  - Form designer
  - Sheet-feed & continuous form printers
- Printing 40-character addresses
QuickFill prints using the standard Windows print drivers. When you select 'Page setup' from the 'File' menu, and then select one of the output types listed, a screen appears on which you can change the size, source and orientation of the paper, the fonts, and the margins that you want to use for printing. You can also specify the printer to which you would like to print.

QuickFill stores separate page setup specifications for batch reports, other reports, two types of labels, and simple and detailed bills and renewals. This allows you to designate different printers and paper sizes for each of those categories of printable output.

Most of the fields on the initial 'Page setup' screen are standard Windows page setup fields. However, the three font buttons ("Head1 Font," "Head2 Font," and "Body Font") are unique to QuickFill. These buttons allow you to change the font used in the reports, labels, bills and renewals you print from QuickFill.

For all of the reports, the “Head1 Font” button provides access to the font settings for report headers. The “Head2 Font” button provides access to the font settings for the report description. Finally, the “Body Font” button provides access to the font settings for the data displayed in the body of the report. The top, bottom, left and right margins for reports may also be set.

There are two complete settings for printing labels—“Pressure sensitive” and “Chesire”. When printing labels you can choose either of these settings. This lets you have settings for pressure sensitive labels stored for one printer while at the same time you have Cheshire label settings stored for a different printer. For labels you do not set the margins on the ‘Page Setup’ screen. Instead click the “Label Setup” button to bring up the “Label Options” screen (see p. 14.5 for details). On that screen you can select from a list of predefined label setups, or you can create your own setup if you cannot find your label stock in the list.

For bills and renewals (both simple and detailed) you can change the printer, paper size, and paper orientation. There are font and margin controls on the screen but these are present for use with older QuickFill systems. They have no effect in new systems. To change the fonts and margins of your bills and renewals use the QuickFill Form Designer application.
If you are printing bills and renewals on a dot matrix printer be sure to select a printer font for your bills and renewals. The printer fonts are indicated by a icon next to their name in the font list. The names of printer fonts vary from one printer to another, but typically have names such as “Draft 12 cpi” or “Courier 12cpi”. Choosing a True Type ( icon) or Open Type ( icon) font will work, but printing will be slow.

If you are printing bills and renewals on a laser or ink jet printer you can choose any font available. They should all print equally quickly.
Page setup for reports

In this section we discuss settings that apply to files printed from the ‘Reports’ tab of the ‘Print saved reports’ screen. (See chapter 10, Reports, p. 10.18, for more information on the ‘Print saved reports’ screen.)

To access the ‘Page setup’ screen, go to the ‘File’ menu, select ‘Page setup’, ‘Reports’, and then select the report type (‘Batch reports’ or ‘All other reports’). The ‘Page setup’ screen allows you to change the printer; the size, source and orientation of the paper; the fonts; and the margins used to print a particular type of report. After you make the appropriate changes, click on “OK” to save them.

Note: When you select a report type and make changes to it, those changes will affect all of the reports that are of the same type.

As mentioned earlier in this chapter, most of the fields on the initial ‘Page setup’ screen are standard Windows page setup fields. However, the three font buttons (“Head1 Font,” “Head2 Font,” and “Body Font”) are unique to QuickFill. See p. 14.2 for detailed information on these buttons.
Page setup for labels

In this section we discuss settings that apply to files printed from the 'Labels' tab of the 'Print saved reports' screen. (See chapter 10, Reports, p. 10.18, for more information on the 'Print saved reports' screen.)

Before printing labels, you should make sure that you have set up a definition for the type of labels you wish to print. To do this, go to the 'File' menu, select 'Page setup', 'Labels', and either the 'Pressure Sensitive' or 'Cheshire' menu item. Then click on the “Label Setup” button so that the “Label Options” screen is displayed. The cursor will be on the label type that is currently being used and information for that label type will be displayed on the right side under the heading “Label Information.”

*Default label setups*  QuickFill has default settings for the 15 Avery® label types listed below as well as one setting for standard Cheshire labels.

<table>
<thead>
<tr>
<th>Product #:</th>
<th>Description:</th>
<th>Type:</th>
</tr>
</thead>
<tbody>
<tr>
<td>4013</td>
<td>3-1/2&quot; x 15/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4014</td>
<td>4&quot; x 1-7/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4015</td>
<td>5&quot; x 15/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4020</td>
<td>3&quot; x 15/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4022</td>
<td>4&quot; x 1-15/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4065</td>
<td>4&quot; x 15/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4076</td>
<td>5&quot; x 2-15/16</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4088</td>
<td>4-1/4&quot; x 2-15/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4090</td>
<td>5&quot; x 1-15/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4109</td>
<td>3-1/3&quot; x 15/16&quot;</td>
<td>Dot Matrix Labels – 4 across</td>
</tr>
<tr>
<td>4143</td>
<td>4&quot; x 15/16&quot;</td>
<td>Dot Matrix Labels – 2 across</td>
</tr>
<tr>
<td>4145</td>
<td>3-1/2&quot; x 15/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>4146</td>
<td>4&quot; x 1-7/16&quot;</td>
<td>Dot Matrix Labels – 1 across</td>
</tr>
<tr>
<td>5160</td>
<td>1&quot; x 2-5/8&quot;</td>
<td>Laser Labels – 3 across</td>
</tr>
<tr>
<td>5161</td>
<td>1&quot; x 4&quot;</td>
<td>Laser Labels – 2 across</td>
</tr>
</tbody>
</table>

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Printing

Labels

Note: Label setups

QuickFill stores the information that you enter on the label setup screen in the QFW_LABELS.DAT file in your QuickFill program directory (\QFW). To restore a copy of QuickFill’s default label types, click on the “Restore defaults” button on the “Label Options” screen.

From the “Label Options” screen, you can define a new label type, or, edit or delete a previously defined label type. When you click on “New” or “Edit,” the “Label Details” screen will be displayed. This screen includes the following fields:

- **Top Margin** Enter the number of inches from the top of the page to the beginning of the first row of labels.
- **Bottom Margin** Enter the number of inches for the margin at the bottom of the page.
- **Vertical Pitch** Enter the number of inches from the top of the first row of labels to the top of the second row of labels.
- **Side Margin** Enter the number of inches from the edge of the page to the first column of labels.
- **Horizontal Pitch** Enter the number of inches from the beginning of the first column of labels to the beginning of the second column of labels.
- **Width** Enter the width, in inches, of each label.
- **Height** Enter the height, in inches, of each label.
- **Lines per inch** Enter a number between 1 and 20 to specify the number of lines per inch you wish to print. This field is a required field.

The default for this field is eight.

Note: QuickFill always creates seven-line labels

Labels are seven lines deep regardless of the number of lines per inch specified in this field. QuickFill always saves room to put information (such as key code, order number, expiration date, etc.) on the top line of the label. That means you have six lines remaining. If you don’t have enough room on the label for all the address information, QuickFill drops the customer’s title first, and then the department.

For example, when entering a customer’s address, the customer address form contains room for the following label information:

Prefix, first name, last name, suffix
Title
Company
Department
### Printing Labels

- **Street line 1**
- **Street line 2**
- **City, state, zip/postal code**
- **Country**

If you enter a domestic address with all of these fields filled in, your mailing label would include:

<table>
<thead>
<tr>
<th>Line 1</th>
<th>Key code, customer number, order number, and/or other data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line 2</td>
<td>Prefix, first name, last name, suffix</td>
</tr>
<tr>
<td>Line 3</td>
<td>Company</td>
</tr>
<tr>
<td>Line 4</td>
<td>Department</td>
</tr>
<tr>
<td>Line 5</td>
<td>Street line 1</td>
</tr>
<tr>
<td>Line 6</td>
<td>Street line 2</td>
</tr>
<tr>
<td>Line 7</td>
<td>City, state, zip/postal code</td>
</tr>
</tbody>
</table>

If you enter a foreign address with all of these fields filled in, your mailing label would include:

<table>
<thead>
<tr>
<th>Line 1</th>
<th>Key code, customer number, order number, and/or other data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Line 2</td>
<td>Prefix, first name, last name, suffix</td>
</tr>
<tr>
<td>Line 3</td>
<td>Company</td>
</tr>
<tr>
<td>Line 4</td>
<td>Street line 1</td>
</tr>
<tr>
<td>Line 5</td>
<td>Street line 2</td>
</tr>
<tr>
<td>Line 6</td>
<td>City, state, zip/postal code</td>
</tr>
<tr>
<td>Line 7</td>
<td>Country</td>
</tr>
</tbody>
</table>

**Number Across**
Enter a number between 1 and 10 to specify the number of labels to be printed across the page (a.k.a. the number of labels per row). This field is a required field.

**Description**
Enter a description for the label type you are defining. For example if you are setting up a definition for issue labels and you always print your issue labels on Avery #5160 labels, you might use a description of “Avery 5160 - for issue labels.” This field is a required field.
Page setup for forms

**Bills & Renewals**
In this section we discuss settings that apply to bill and renewal files printed from the ‘Forms’ tab of the ‘Print saved reports’ screen. (See chapter 10, *Reports*, p. 10.18, for more information on the ‘Print saved reports’ screen.)

Before printing bills and renewal notices, you should make sure that you have set up definitions for the type of bills and renewal notices you wish to print. QuickFill produces simple forms or detailed forms depending on the format(s) specified in your billing packages and renewal packages.

*Note: using detailed forms*
Detailed forms should be used to send 8 ½” x 11” bills, renewal notices, or acknowledgments to the bill-to customers of gift (or group) subscriptions. These forms list up to eight ship-to customers on their bottom half. If a subscription has more than eight bill-to customers, QuickFill creates additional pages until all of the ship-to customers are listed. (Refer to chapter 9, *Updates*, p. 9.15 for information on the sort order for detailed bills and renewal notices.) QuickFill will not produce a detailed form for single subscriptions or subscriptions linked to a series that sends bills or renewal notices to ship-to customers.

As mentioned earlier in this chapter, for bills and renewals (both simple and detailed) you can change the printer, paper size, and paper orientation. There are font and margin controls on the screen but these are present for use with older QuickFill systems. They have no effect in new systems. To change the fonts and margins of your bills and renewals use the QuickFill Form Designer application.

*Remember:* If you are printing bills and renewals on a dot matrix printer be sure to select a printer font for your bills and renewals. (See p. 14.3 for details.)

**Form designer**
You can use the QuickFill Form Designer to create customized bills, renewals, and order acknowledgements without resorting to the mail merge feature of your word processor application.
You can make minor modifications to the layout of the standard QuickFill bill, renewal and order acknowledgement forms, or you can use it to design completely new form layouts from scratch. You can add your company logo to the form so as to avoid the expense of ordering imprinted paper stock. If you have more than one publication you can customize the content of the forms so as to vary the text for each publication. If you want to design a renewal series where each effort in the series is a fresh, different design, you can use the Form Designer to do that.

The standard QuickFill forms are designed to encompass a very wide variety of situations. Not all of those situations may apply to you, so you may wish to remove some elements of the standard design and use the space for other purposes. For example the standard renewal notice has space for five different offer prices, but you may only offer one and two year subscriptions. You can use the space reserved for those unused offers to add more text or to shift elements around so as to make the design more attractive.

Form set codes are used to identify the layout design you wish to use for a particular set of bills, renewals or order acknowledgements. In QuickFill you specify the form set code on the ‘Billing Packages’ or ‘Renewal Packages’ definition screens (billing package definitions are used for both bills and order acknowledgements). If you have not filled in the form set code on any of your package definitions, then QuickFill will use the default ‘Blank’ form set code.

Here are some situations where you might want to specify form set codes in your package definitions:

- You are going to print some of your bills and renewals on something other than plain blank white paper. For example you may have paper stock that is imprinted with your company logo. You can use the form set code to identify the type of paper that should be loaded in the printer.
- You want each publication to have a different logo or text on the bills and renewals. You can vary some of the text by making use of the messages that are linked to the billing series and renewal series, but you might have the need to include more text than can fit in eight lines of forty characters each.
- You wish to change the layout or text for some efforts in the series. By assigning different package definitions and form codes to each effort you can control which layout will be used.

When printing bills, renewals, or order acknowledgements, if QuickFill encounters a form set code, it looks for a layout design with a matching form code. If one is not found, the ‘Blank’ form set is used. Therefore, if you do use form set codes in your package definitions you should be careful to define those same form set codes in the Form Designer.
Form sets

In the Form Designer, form set codes appear in the ‘Form sets’ window which usually appears at the top left corner of the screen, but which can be dragged to any other position you desire. Each form set code has nine forms listed beneath it, one for each of the seven types of output that QuickFill can produce, plus one for the file header page and one for the group header page. These forms are named HEADER, GROUP, BILL, ACK, GIFTBILL, GIFTACK, COMBOBILL, RENEWAL and GIFTRENEWAL. For complete details on designing forms, refer to the built-in help system for the QuickFill Form Designer (FormDesigner.chm).

Setting the printer margins

If you find that the text on your printed bills or renewal notices is out of alignment, that is you need to shift the text to the left, right or up or down then follow this procedure.

For older QuickFill systems

If you started on QuickFill before version 1.6 and you have never made any changes to the form designs using QuickFill's Form Designer application, then the top and left margins should be adjusted from the 'Page Setup' screen which can be found on the File menu. There are actually four page setup screens:

- Simple Bills. This page setup screen controls standard bills and combination bills, printed on 8.5 x 7 inch forms.
- Detailed Bills. This page setup screen controls gift and group bills with detailed lists of ship-to addresses, printed on 8.5 x 11 inch forms.
- Simple Renewals. This page setup screen controls standard renewal notices, printed on 8.5 x 7 inch forms.
- Detailed Renewals. This page setup screen controls gift and group renewals with detailed lists of ship-to addresses, printed on 8.5 x 11 inch forms.

On each of these page setup screens you will see fields where you can set the left and top margins.

- To move text down, increase the top margin.
- To move text up, decrease the top margin.
- To shift the text to the left, decrease the left margin.
- To shift the text to the right, increase the left margin.

Page setup settings are computer specific. You will need to repeat these changes on each computer you use to print bills and renewal notices.
For newer QuickFill systems

If you started on QuickFill on or after version 1.6, or you have used the QuickFill Form Designer application to change the layout of your bills and renewals then you must use the Form Designer to if you need to shift the text on your printed bills. You must also follow this procedure if you started on QuickFill before version 1.5 then skipped directly to version 1.6 or later without ever installing version 1.5.

Start the Form Designer application. You will find it on the QuickFill submenu, which you can reach by clicking the Windows Start button, then ‘All programs’. If you do not see the Form Designer listed there on your computer, and your QuickFill system is installed to a network server, then you should re-run the Workstation Setup program which can be found on the server in the Workstation folder inside the QuickFill program folder.

Select the appropriate form set and form from the list on the left side of the screen. The ‘Blank’ form set is the default form set and is used if you have not specified a form code on the bill or renewal package definition screen.

Verify that the ‘Snap to grid’ feature is turned off. It is turned off if there is no check mark next to the ‘Snap to Grid’ command on the ‘Arrange’ menu. If the ‘Snap to Grid’ command has a check mark then remove it by selecting the command.

Choose the ‘Select all’ command from the Edit menu, or press Ctrl-A. This will select all of the elements on the form.

Drag the elements up, down, left or right as needed. You can also use the arrow keys on your keyboard to make small adjustments.

Verify your changes by printing a sample page from within the Form Designer. Use the ‘Print...’ command on the ‘File’ menu.

Save your changes by choosing the ‘Save’ command on the ‘File’ menu.

Changes that you make in the Form Designer are not computer specific. You only need to make these changes once and all of your QuickFill computers will pick up the new settings.

Setting the paper size

If you want to print standard ‘Sheet-feed’ form (8.5” x 11”) bills or renewal notices, you can use QuickFill’s default page setups.

To print standard seven-inch long continuous form bills or renewal notices through QuickFill you must tell Windows about the unusual paper size that you will be using. This must done on each workstation from which you will print bills or renewals.
Windows 95/98/ME:

1. From QuickFill’s ‘File’ menu, select ‘Page setup’, and then ‘Bills’, or ‘Renewals’ followed by ‘Standard’.

2. Click on the “Printer” button on the bottom right side of the “Page Setup” screen. The screen that appears will list the default printer for your machine. If the printer listed is not correct, click on the arrow to the right of the printer name and select the appropriate dot matrix printer.

3. Click on the “Properties” button to the right of the printer name.

4. Once your printer properties are displayed, go to the ‘Paper size’ field on the ‘Paper’ tab and click on “Custom;” this should be the last paper size listed.

5. On the “User-Defined Size” screen, make sure “0.01 inches” is selected for the ‘Unit’ and then enter “850” for the ‘Width’ and “700” for the ‘Length’ for bills and renewals.

6. Click on “OK” to get back to your printer properties. Click on “OK” to get back to the page setup screen that lists your printer. Click on “OK” until all of the page setup screens are closed.

7. If you have selected a dot matrix printer the following warning will appear:
   “You have selected a non-device font with a low-resolution printer. This may cause printing to be very slow. Are you sure?”

8. If you are not concerned with how quickly your forms print and prefer to use a font other than one of the “CPI” device fonts, simply click on “Yes.” If you would like your forms to print as quickly as possible, click on “No” to this warning and the page setup screen will reappear.

9. Click on the “Body Font” button, select one of the fonts that has a name ending with “CPI” (such as Sans Serif 10 CPI), and click on “OK.”

If you use the QuickFill Form Designer, take the following steps instead:

1. From the form designer menu, select ‘Print Setup’.

2. If the printer listed is not correct, click on the arrow to the right of the printer name and select the appropriate dot matrix printer.

3. Click on the “Properties” button to the right of the printer name.

4. Once your printer properties are displayed, go to the ‘Paper size’ field on the ‘Paper’ tab and click on “Custom;” this should be the last paper size listed.
5. On the “User-Defined Size” screen, make sure “0.01 inches” is selected for the ‘Unit’ and then enter “850” for the ‘Width’ and “700” for the ‘Length’ for bills and renewals.

6. Click on “OK” to get back to your printer properties. Click on “OK” to get back to the print setup screen that lists your printer. Click on “OK” to close the print setup screen.

Windows NT/2000/XP:

Steps 1 through 6 of the following instructions take place from your workstation’s desktop and not from within QuickFill.

1. Double click on ‘Printers’ from the Windows control panel.

2. Select ‘Server Properties’ from the ‘File’ menu.

3. Select the ‘Create a New Form’ check box on the ‘Forms’ tab.

4. Enter a description (such as, QuickFill Forms) for your form.

5. In the ‘Measurements’ section of the screen, make sure “English” is selected for the ‘Units’ and then enter “8.50 in” for the ‘Width’ and “7.00 in” for the ‘Length’ for bills and renewals.

6. After entering the correct measurements, click on “save Form.”

7. From QuickFill’s ‘File’ menu, select ‘Page setup’, then ‘Bills’ or ‘Renewals’, then ‘Standard’.

8. Click on the “Printer” button on the bottom right side of the “Page Setup” screen. The screen that appears will list the default printer for your machine. If the printer listed is not correct, click on the arrow to the right of the printer name and select the appropriate dot matrix printer.

9. Click on the “Properties” button to the right of the printer name.

10. Once your printer properties are displayed, click on the “Advanced” button, go to the ‘Paper size’ field, and select the form you created above.

11. Click on “OK” to get back to your printer properties. Click on “OK” to get back to the page setup screen that lists your printer. Click on “OK” until all of the page setup screens are closed.

12. If you have selected a dot matrix printer the following warning will appear:

“You have selected a non-device font with a low-resolution printer. This may cause printing to be very slow. Are you sure?”

13. If you are not concerned with how quickly your forms print and prefer to use a font other than one of the “CPI” device fonts, simply click on “Yes” to
this warning. If you would like your forms to print as quickly as possible, click on “No” to this warning and the page setup screen will reappear.

14. Click on the “Body Font” button, select one of the fonts that has a name ending with “CPI” (such as Sans Serif 10 CPI), and click on “OK.”
40-character addresses

In this section we discuss printing 40-character addresses on labels, bills, and renewal notices.

If you use 40-character addresses (that is, the ‘Limit address label width to 30 characters’ field on the ‘General’ tab of the preferences definition screen is not checked) you may experience some problems when printing your labels, bills, and renewal notices. In most cases, these problems can be resolved by choosing the proper font.

Labels

If you use a printer that uses downloadable scalable fonts, such as an ink jet or laser printer then it is easy to choose a font that is small enough to print 40-character wide labels within the physical confines of a label. For example the commonly available Avery 5160 label stock for laser printers has 10 rows of 3 labels on an 8.5” x 11” sheet, each label being one inch high and 2 and 5/8 inches wide. In order to fit 40 characters into a width of 2 5/8 inches the character, the pitch must be no more than 16 characters per inch. This requirement can be met by using a 7 point “Lucida Console” or an 8 point “Courier New” font. Both of these are fixed pitch fonts. You can also use a proportional font such as Times New Roman or Arial Narrow, but then the width of the label text will depend on exactly what characters are on each line and you risk running off the edge of the label if there are a lot of wide characters. This is particularly a problem if you have entered your addresses in upper case because upper case characters are wider than lower case characters.

If, on the other hand, you have an impact printer such as one of the Epson DFX series, then the printer achieves its maximum rated speed only when you use one of the built-in printer fonts. Windows will allow you to use scalable fonts with these printers but the printing will be very slow. Suppose you are printing standard Cheshire labels with four labels across on 14 1/2 inch paper. The labels are supposed to be 3 inches wide with a half inch between each label to allow sufficient clearance for the Cheshire machine to cut the labels. In order to print 40 characters in a width of 3 inches, the character pitch must be no
Printing

40-character addresses

more than 40/3 or 13.33 characters per inch. The Epson DFX 5000 has built-in fonts with a pitch of 10, 12 and 17 characters per inch. The 10 and 12 pitch fonts are too wide. The 17 pitch font is narrow enough -- but it is so narrow as to be virtually unreadable. The Epson DFX 5000+, on the other hand, has a built-in 15 pitch font which should be acceptable.

Bills and renewal notices

Printing 40-character wide addresses on standard bills and renewal notices is a little easier. There is approximately 3 1/3 inches available for printing the address. Forty-character wide addresses will fit in that space if they are printed at 12 characters per inch. On laser and ink jet printers with scalable fonts, this requirement can be met by using a 10 point “Lucida Console” or an 11 point “Courier New” font. Most impact printers (such as the Epson DFX series) have built-in 12 pitch fonts that should work.

Overall, whether you choose to make use of 30-character wide or 40-character wide addresses will depend on how you print your labels, bills, and renewal notices. If your printer (or your letter shop’s printer) cannot print using a font small enough to fit your label stock then you must select the ‘Limit address label width to 30 characters’ field on the ‘General’ tab of the preferences definition screen.
Appendix A

Creating a Publication
Creating a Publication

Before you begin to use QuickFill, you must tailor it to your own needs. That means you must go through each of the definitions and fill out the “screen forms” described in the definitions’ help files.

To make it easier for you to begin, we’ve provided you with a “mini version” of “Definitions” in this section. If you work through the checklist we present here, you’ll have “defined” enough features to get started.

Think of this “quick start” section as a guided tour through an unfamiliar city. The tour guide will point out the highlights, but to get a real feel for the city, you’ll have to take guidebook in hand and explore the terrain on your own.

In this section, we describe the basic steps you must take to set up QuickFill for use with one of your own publications. You’ll see how to create a publication. We’ll also show you how to modify or create these other components:

- a company that owns the publication you define,
- a first issue,
- a billing series,
- a renewal series,
- a tracking code.

When you’ve checked off all the items on the list below, you’ll be able to enter orders and renewals into QuickFill, record payments, and so on. Completing the checklist, however, is not a substitute for reading the help files for each of the definitions.

To get the most out of QuickFill, you should set aside some time to read the overviews of marketing, billing, and renewal definitions (see chapter 8, Definitions). In addition, we recommend that you go over the overviews of these definitions in the built-in help system carefully. We strongly recommend you do that before you’ve entered too many orders. Just reading the help files will give you a good idea of what you can do with QuickFill. Then you can set
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it up to work exactly as you like. (And, having completed the checklist below, you’ll already have a good head start.)

Now, let’s go through the steps you should take to get up and running. As you finish each step, check it off in the box (✓). (Because this is only a guided tour, we don’t explain each option in detail the way we do in the built-in help system. So see the help system if you have problems with filling in the fields.)

Start QuickFill, open your database (usually in the \QFW\QFWDB directory), and select ‘Companies’ under ‘Definitions’ on the main menu. Click on the sample company and then click on “Change.”

You use the ‘Companies’ definition screen to define the company—or companies—that owns your publications. One company wholly owns a single publication. But a single company can own many publications.

Change the company code “SAMPLE” to whatever code you want to use to identify your company. (The code can contain only letters and numbers, not other characters, such as dashes.)

Enter your company name, address, and telephone number.

Enter the accounting method you use (cash or accrual), your accounting year, and accounting period.

QuickFill can produce bills and renewal notices with or without your company name and address. This means that you can have your company information preprinted on your computer forms. With that information in mind:

Decide whether or not you want to change the “Print company name on bills” and “Print company name on renewals” fields.

If you want your company’s federal tax ID number printed on your bills and renewal notices preceded by the phrase “Federal tax ID,” enter that number in the ‘Federal tax ID number’ field. If you leave the field blank, QuickFill won’t print the phrase.

If you have merchant ID numbers for any of the credit cards you see listed, provide those numbers in the merchant ID fields.

If you are going to use a ‘Credit card output format’ that requires a Client ID, enter your client ID in this field.

Use the ‘Credit card output format’ field to specify the format you want the ‘Credit card charges’ update to use when credit card charge files are created (refer to the built-in help system for details on the credit card output formats). Right click once to select from the list of available formats.
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☐ Click on “OK” to save your changes and then leave this screen.

☐ Select ‘Preferences’ under ‘Definitions’ on the main menu.

You use the ‘Preferences’ screen to specify options that apply to all your publications. (Remember: you can use QuickFill for multiple publications and multiple companies.) For example, on this screen you choose how you want to display dates.

☐ Set “Company name for batch reports” field on the ‘Batch reports’ tab to your company name.

Leave the other entries unchanged for now.

☐ Click on “OK” to save your changes and then leave the ‘Preferences’ screen. Once you’ve gone through the definitions help files, you may want to make additional changes on the ‘Preferences’ screen.

☐ Select ‘Publications’ under ‘Definitions’ on the main menu. If you have not already defined any publications, QuickFill will display the tabs for creating a new publication.

Note: creating a new publication

If you have already defined a publication(s), you can create a new publication by replicating an existing one. If you have not already defined a publication or if your publication is completely different from an existing publication, you can click on “New” to start from scratch. When you create a new publication from scratch, the billing and renewal tabs mentioned below do not appear. QuickFill automatically links the new publication to the “STD” billing series (or, if there is no “STD” billing series, the new publication will automatically be linked to the first billing series listed on the “Billing series” screen) and creates a new “STD” renewal series. After the new publication has been created, you can go back and create a new billing series and/or edit the renewal series created for the publication.

The publication definition has five tabs (six if you are using the audit system). Use Ctrl+Right (arrow key) and Ctrl+Left (arrow key) to move from one tab to the other.

General tab

☐ Change the entry in the ‘Publication code’ field to the code you want to use for your own publication. QuickFill uses this code when it doesn’t have enough space to display a publication’s full name—in the lookup screens, for example.
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- Enter your publication’s name. QuickFill prints the name exactly as you enter it here—including the break between the lines—when it prints bills, renewal notices, and credit card forms.

- Right click in the ‘Company name’ field to select your company.

- An entry in the ‘Checks payable to’ field is optional. If you enter the name you want your customers to make their checks payable to, QuickFill prints this name on your bills and renewal notices, preceded by the message “Check payable to.” If you leave this field blank, QuickFill won’t print the message.

- Issues per year
Enter in this field the number of issues that you publish in a normal year. QuickFill uses this number when it assigns issue dates to issues you create with the “add to end” option.

Now carefully review the remaining fields on this tab and change any entries you need to. QuickFill uses your entries in these fields to implement your publication policies. We explain below how to fill in these fields:

- Is this publication active – Should updates be allowed?
If you are ready to begin fulfilling subscriptions to this publication and running updates for it, check this field.

- Is this publication active – Should orders be accepted?
If you are ready to begin entering orders to this publication, check this field.

- Publication type
Enter in this field the selection that best describes your publication. QuickFill generates different bills for periodicals, books, services, conferences, membership organizations, and online services. A periodical is any publication for which you offer customers a fixed number of issues in a subscription; a book is a one-shot publication; and a service is a publication with a fixed term (one year, for example) but without a fixed number of issues.

- Pricing method
QuickFill supports two styles of pricing: unit pricing and stepped pricing. These methods differ only in the way orders for multiple copies are priced. Unless you have many multicopy orders, you will probably find the unit pricing method most satisfactory, so leave this field set to unit pricing.
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☐ Tax rate table

If this publication isn’t subject to sales tax, leave this field blank. If the publication is subject to sales tax, you can create the necessary tax rate table now from within the publication definition general tab. (As a rule, you have to enter rates for only those states where you have business or sales offices.) Place your cursor in the ‘Tax rate table’ field, right click, and select “New tax table.”

How you define the entries in your tax rate table depends on whether or not you will also be using a tax jurisdictions table. If you are only charging sales tax for customers living in states or provinces with a single tax rate and reporting requirements, then you do not need a tax jurisdictions table. In that case, you define the jurisdiction code and sales tax rate for each state or province in the tax rate table.

If you are using a tax jurisdictions table (because you have multiple jurisdictions within states or provinces that have different tax rates or reporting requirements), then you should define the entries in the tax rate table simply as rate codes. For example, the code "A01" might be used for 5% sales tax regardless of the location of jurisdictions charging the 5% rate. (Refer to “Definitions menu,” “Tax jurisdictions” in the table of contents for QuickFill’s built-in help system for more details on the tax jurisdictions table.)

Click on “OK” to save the data you entered, and you’ll automatically return to the publication definition general tab.

☐ Charge tax on shipping

You can include the shipping charge in the sales tax computation by clicking once in this field so that a check mark appears in it. If your sales tax is based on the price of the subscription only, then leave this field blank.

Billing tab

If you are creating a new publication instead of replicating an existing one, this tab will not be present until after the publication has been created.

☐ Billing series

You use a billing series to let QuickFill know how you want to bill customers. QuickFill uses the billing series you enter here as the default for all orders—both new and renewal—for this publication. Leave the entry in this field “as is” for now. You’ll modify this series to your specifications below.

☐ Smallest amount that will be billed

Say you enter a payment that leaves an order with a balance due that is less than the amount you enter in this field. QuickFill automatically writes this
amount off.

- **Smallest amount resulting in cancellation for nonpayment**

  By setting this field to have a bigger dollar amount than the previous field, you can define a range of amounts that are big enough to be worth billing for but small enough that you are still willing to attempt to renew.

- **Maximum number of issues to backstart reinstated orders**

  Do you send missed issues to customers who were canceled for nonpayment, then reinstated when they paid? If you do, enter the maximum number of issues you want to backfill. QuickFill will then produce the required back-issue labels automatically when you run the first ‘Issue labels’ update after you enter the late payment.

  Your entries in the next two fields determine your publication’s default policy for sending first bills for unpaid new orders. These fields are mutually exclusive. When you enter a number in one, data in the other is blanked out.

- **Send first bill with issue**
  - Send first bill immediately

  Click once on one of these fields so that the circle becomes filled in or leave these fields blank. Selecting “Send first bill with issue” means that you want to send the first bill for an unpaid new order (not a renewal order) with the initial (that is, first ever) issue. Selecting “Send first bill immediately” means that you want to send the first bill immediately, without waiting for the first issue to be served.

  If you choose to send the first bill with the first issue, QuickFill produces the first bill when you run the ‘Issue labels’ update, not when you run the billing update. QuickFill also automatically sorts the issue labels for those orders receiving these first bills into a separate group (refer to the built-in help system for details on the ‘Issue labels’ update). You can use the address on the bill with a window envelope.

- **Send first bills ___ days after first issue**

  When you enter a number other than 0 in this field, QuickFill gives you a built-in delay before you mail the first bill. Usually, you select this option if you want to ensure that the customer receives the first issue of a new order before he or she gets the bill. If you specify no delay by entering 0 in this field, QuickFill will produce bills for new orders at any time after you run the ‘Issue labels’ update that produces the first label.
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☐ Delay the billing of renewal orders until their first issue has been served

If you leave this field blank, QuickFill begins billing renewal orders immediately. If you do not want renewal orders to be billed until their first issue has been served, check this field.

☐ Bill the unpaid balance after an order is canceled

If you leave the default, check mark, in this field, QuickFill issues one “cancel bill” to canceled subscribers who have not paid for issues they’ve received. QuickFill generates this bill for both subscriptions it canceled automatically for nonpayment and subscriptions you canceled with the ‘Cancel’ transaction. The cancel bill is for an amount equal to the value of the issues you served—less, of course, any partial payments, credits, and so forth. QuickFill will generate a cancel bill only for amounts that are more than the minimum billing amount you entered in the previous field. The billing package and messages you want to use for the cancel bill are also specified on this tab.

If you leave this field blank, QuickFill writes off the unpaid balance automatically whenever a subscription is canceled without generating a cancel bill.

☐ Cancel bill package

☐ Message1 and Message2

Your entries in these fields are used to control the mailing package and messages QuickFill uses for cancel bills. Fill these fields in even if you do not send cancel bills (that is, your ‘Cancel bill’ policy field is blank). That way, if you change your ‘Cancel bill’ policy, the messages will be in place.

Leave the ‘Cancel bill package’ as CANCEL, until you’ve had a chance to read the full documentation on billing packages and cancel bills. If you plan to send cancel bills, you’ll probably want to modify the messages to suit your own needs. You can do so now by placing the cursor on the message you want to change, right clicking once and selecting “Change message.” The ‘Messages’ definition screen will appear with four 40-character lines. QuickFill prints this four-line message on the cancel bill. You can edit this message, then click on “OK” when you’re done. QuickFill returns you to the publication definition billing tab. Repeat the process to modify the second message. If you want to use only one message, delete the second by placing your cursor on that message, right clicking once and selecting “Clear.”

☐ Write off amount due no sooner than ___ days after cancel bill has been sent

When a cancel bill is issued the amount due is reduced to a prorated amount based on the number of issues the subscriber received. This reduced amount due is normally written off the next time you run the billing update. If the
customer then sends payment, QuickFill automatically reverses this write-off when you enter the payment. If you wish to delay this write-off, so that the reduced amount due continues to appear on the Accounts Receivable report, enter the number of days that must elapse before it is written off.

- Automatically refund overpayments

You can either carry overpayments as credit balances or “automatically” refund them. (If you choose to carry the overpayments as credit balances, QuickFill applies the payments to renewals, or you can refund them individually with the ‘Refund’ transaction.)

Click once in this field so that a check mark appears in it, and QuickFill automatically refunds any overpayments you receive.

If you are not comfortable issuing “automatic” refunds, leave this field blank. You can then run the ‘Credit balance’ report to review outstanding credit balances, then handle each one individually.

- Smallest amount that will be automatically refunded

QuickFill records overpayments less than this amount (even if you chose to automatically refund overpayments in the field above) as a credit balance. Running the ‘Credit balance’ report lets you identify these cases. You can then refund the balance, carry the balance forward, or write it off.

Renewal tab

If you are creating a new publication instead of replicating an existing one, this tab will not be present until after the publication has been created.

- Renewal series

You use a renewal series to let QuickFill know how you want to renew customers. QuickFill uses the renewal series you enter here as the default for all orders—both new and renewal—for this publication. Leave the entry in this field “as is” for now. You’ll modify this series to your specifications below.

- Renew unpaid orders

The default is to not renew unpaid orders. Click once in this field so that a check mark appears in it, and QuickFill will generate renewal notices for orders with unpaid balances (greater than the minimum billing amount) when you run the ‘Renewal notices’ update. These customers will then be receiving both bills and renewal notices.
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- Number of grace issues before expired subscription is canceled

Grace issues are issues you send after an order has expired with the hope that the customer will renew. If you send grace issues, then receive a renewal, QuickFill automatically counts the grace issues as part of the renewal order. Enter the number of grace issues you want to send—if any—in this field.

- Smallest term that is eligible to receive grace issues

Sometimes you may have some free trial subscriptions or reduced price short-term trials that should not receive any grace issues. If so, then enter the term of the shortest “regular” subscription that is eligible for gracing.

- Deduct graced issues from the renewal order if fewer than __ issues were missed

If you send grace issues, then receive a renewal, QuickFill automatically will count the grace issues as part of the renewal order if the number of issues missed since the prior order ended is less than the number you enter here. If more than this number of issues has been missed the graced issues will be “forgiven” and will not be deducted from the renewal order. If you always want to deduct the graced issues from the renewal, enter a value of 999. If you never want to deduct the graced issues from the renewal enter a value of 0.

- Maximum number of issues to backstart renewal orders

Do you send missed issues to customers who renew late? If you do, enter the maximum number of issues you want to go back. QuickFill then produces the required back-issue labels automatically the first time you run the ‘Issue labels’ update after you enter the “late” renewal.

Shipping tab

- Shipping code overrides

When you enter a new subscriber QuickFill determines which of the six possible regions the subscriber is located in by looking up the subscriber’s country code in the foreign country table. If you have entered a shipping code in the field for that region on this screen QuickFill will use that code as the default shipping code for the new subscription. If you have left the shipping code field blank on this screen then QuickFill uses the shipping code in the foreign country table.

Looking at it another way, the foreign country table specifies the default shipping code to be used for subscribers located in each country. The publication definition screen provides a way of overriding those values and specifying a shipping code to be used for all countries in the region.
Example: Most of your publications are sent airmail to Europe and the Americas, and by surface mail to other countries, so you set the default shipping codes in the foreign country table accordingly. However, you have one publication that must be sent by airmail to all foreign countries. Enter an 'A' in all regions except the USA and QuickFill will automatically use that code for foreign subscriptions to this one publication.

Shipping codes for renewal orders

Shipping codes for renewal orders always default to the shipping code of the previous order. However, you may override this code by entering a different code in the 'Shipping class' field when you enter the renewal.

Shipping codes and descriptions

Any of the 26 letters of the alphabet can be used as a shipping code. Typically you will use 'F' for first class mail, 'A' for airmail, but you can edit the descriptions of each of the shipping codes on this screen. Be aware that changes that you make to shipping code descriptions will affect all of your other publications too. Shipping code descriptions apply system-wide and are not unique for each publication.

Cost per issue column

Your entries in the 'Cost per issue' column control the amounts that QuickFill charges subscribers for shipping. These values are the per-issue per-copy cost of postage and handling. You specify these amounts in dollars and cents to five decimal places. (That way, when QuickFill multiplies the price by the number of issues and copies per year, the result comes out as a round number.) If you don’t charge separately for shipping and/or handling, leave 0’s in the 'Cost per issue' column.

Allowed column

The checkboxes in the ‘Allowed’ column control whether or not a particular shipping code is allowed for this particular publication. Example: Most of your publications are delivered by postal mail using shipping classes F (first class mail) and P (periodical class), but a few are delivered by email only and use shipping class E (email). By setting the ‘Allowed’ checkboxes for codes F and P on the postal publications and for code E on the email publication you can avoid data entry mistakes when entering orders for new subscribers.

Presort column

The checkboxes in the ‘Presort’ column control whether or not the ‘Issue labels’ update should create output files suitable for postal presort for these shipping classes. If you leave these boxes unchecked the ‘Issue labels’ update will
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generate QuickFill standard label files that can be printed directly without further processing.

*Note: post-processing of issue label groups*

If you would like to view or print your labels from QuickFill prior to creating postal presort label files, leave the Presort box unchecked. When you run the Issue label update, QuickFill will create standard QuickFill labels. After viewing and/or printing these labels, you can click the “Label Groups” button on the Labels tab of the ‘Print saved reports’ screen to split the label file up into its component groups and/or to create a postal presort file (with the dBase label format). Refer to the built-in help system for details on the ‘Label splitter’.

- **Minimum group size for presort**

The ‘Issue labels’ update sorts the issue labels into groups based on their characteristics. Issues that should be packaged with a renewal notice go in one group, subscribers that require multiple copies go in another group and so on. Some of these groups can be quite small and there isn’t any benefit to performing a postal presort on them. In this field you specify the smallest label group size that you consider to be worth doing a postal presort on. Label groups that are smaller than this value will be output as standard printable labels so that you can print them and deal with separately from the main body of the issue labels.

**Issue labels**

- **Include on label: Order number, Customer number…**

QuickFill reserves the first line of all issue labels for the expiration date, order number, or other useful information. You can select up to five items to appear on the first line. The items selected appear from left to right in the order you specify. The last item is printed flush right. If you assign customer number a “1,” it will appear first. If you assign expiration issue a “2,” it will be printed just to the right of the customer number and so on.

QuickFill will put as many fields as can fit on a 40-character label (or 30-character label if the ‘Limit address label width to 30 characters’ field on the ‘General’ tab of the ‘Preferences’ definition screen is checked). There will always be at least one space between fields. This means that QuickFill may truncate or omit some of the lower-priority fields. Refer to the built-in help system for additional details on this field.

- **Multicopy orders**

Use this field to control how many labels QuickFill produces for multicopy orders. If you leave it set to a value of one QuickFill will always produce one
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label for each order, regardless of the number of copies to be shipped. QuickFill sorts the labels into separate groups according to the number of copies you need for each subscription. The first and largest group of labels will be for orders for a single copy. The second group will be for orders with two copies and the third group for orders with three copies, and so on.

Alternatively you may wish to produce a separate label for each copy of a multicopy order. That is, if a customer with one subscription has requested five copies of the publication, QuickFill produces five labels. This simplifies mailing procedures but adds to your postage costs. But this can be expensive and even impractical for bulk orders for tens or hundreds of copies. You use this field to set the dividing line between separate labels and a single label. If the order is for more copies than the value you specify then QuickFill will produce a single label. If the order is for a number of copies that is less than or equal to the value you enter here then QuickFill will produce a separate label for each copy.

You can change the entry in this field at any time.

☐ Ship premium labels using the same shipping class as the subscriber

Check this box and the labels for premiums will have the same shipping class as was specified when the order was entered.

Normally premiums that are shipped separately from the issues are shipped by the most cost effective method, which is usually not the same as the shipping method used for the issues themselves. For this reason, the premium labels generated by the issue label update do not specify a shipping class. In some cases you may have high value orders where the customer specified and paid for expedited shipping and you want the premiums to be sent using the same shipping class as the issues.

☐ Label group split table

If you need to sort your issues into groups (i.e., new orders, gifts, renewal wrappers, etc.) that differ from the standard QuickFill groups of publication, issue, service code, shipping class, and quantity, enter the name of the label split table you would like to use for this publication in this field.

You cannot type directly in this field. Instead, right click and then select “Pick split table” to choose from a list of label split tables you’ve already defined; select “New split table” to create a new label split table; select “Change split table” to change the definition of the label split table now in this field (be very careful when using the “Change split table” option as the definition of the label split table will be changed in every place that it is used); or select “Clear” to remove the label split table that is currently in this field.
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If the standard QuickFill label grouping is satisfactory, leave this field blank. Refer to the built-in help system for details on defining label split tables.

- Periodical class zone table

If this publication is mailed at periodical class postage rates, enter the periodical class zone table you would like to use in this field. Leave this field blank, if you don’t ship periodical class. When you fill in this field, you can produce the zone breakdown you need to file U.S. Postal Form 3541 by running the ‘QuickFill label splitter’ on your issue label files.

You can create the necessary periodical class zone table now from within the publication definition by placing your cursor in the ‘Periodical class zone table’ field, right clicking once and selecting “New zone table”. Fill in the table, and click on “OK” to save your changes. If you’re at all familiar with periodical class regulations, you’ll have no trouble filling in this table.

- County and SCF table

If your publication is mailed at periodical class postage rates and you want to take advantage of discounted in-county and intra-SCF postal rates, enter the county table you would like to use in this field. Leave this field blank, if you don’t ship periodical class. When you fill in this field, you can produce the county and intra-SCF breakdown you need to file U.S. Postal Form 3541 by running the ‘QuickFill label splitter’ on your issue label files.

You can create the necessary county table now from within the publication definition by placing your cursor in the ‘County and SCF table’ field, right clicking once and selecting “New county table”. Fill in the table, and click on “OK” to save your changes. Once again, if you’re at all familiar with periodical class regulations, you’ll have no trouble filling in this table.

- Click on “OK” to save the changes you’ve made and to return automatically to the publication selection box. You’ll see that the publication you just defined is now listed in the box.

Now it’s time to make sure that the publication’s billing and renewal series meet your specifications. You can use the existing series (STD), modify them to better suit your needs, or create new billing and/or renewal series.

*Caution: billing and renewals series*

When you check over the STD billing and renewal series, pay special attention to the messages and, in the case of renewals, the offers. You’ll almost certainly want to make changes to these two items.

When making changes, keep in mind that renewal series are publication-specific so when you modify a series any changes to it affect only renewals for subscribers to the publication that it was
created for. Billing series, on the other hand, are not publication-specific. Therefore, any changes you make to a billing series affect bills for all subscribers that use that series regardless of the publication they subscribe to.

If you want to use the existing series, you don’t have to do anything. (To see the components of a series, go to the billing or renewal tab of your publication definition, place your cursor in the ‘Series code’ field, right click once and select “Change...”)

If you want to create a new series by replicating an existing one, select ‘Billing’ under ‘Definitions’ on the main menu. Then select ‘Series’ under ‘Billing’ and click on “Replicate” to replicate an existing series. When you’re done, click on “OK” to save your changes. Now, do the same with the renewal series. (Refer to the built-in help system for more information on filling out individual fields on the billing series and renewal series tabs.)

When you’re done, select ‘Publications’ under ‘Definitions’ on the main menu and return to the publication definition screen. Double click on your publication to change it. Move your cursor to the ‘Renewal series’ field and right click once. A box pops up listing the available renewal series. Select the series you want. (If there’s only one choice in the box, you don’t have to move the cursor. Just press Enter.) The pop-up box disappears and the ‘Renewal series’ field has the correct entry in it. Now repeat these steps to fill in the ‘Billing series’ field.

Additional steps to take when creating a new publication:

☐ Create enough issues for your publication to cover the expiration date of the longest subscription you expect to enter into QuickFill (refer to the built-in help system for details on defining issues).

☐ Create at least one tracking code for your publication. In addition to the tracking codes you need for your regular mailings, you should also create tracking codes for miscellaneous orders, such as white mail, phone orders, and comps. For starters, try creating one or two of these miscellaneous tracking codes. At the minimum, you should create a tracking code for the basic term and price combination—the offer—for your publication (refer to the built-in help system for details on creating tracking codes).
Appendix B

Work flows

- Daily tasks
- Updates
- Reports
- Accounting
- Calendar items
Appendix B

Work flows

The following are some suggestions for designing your daily operating procedures. The ideas we offer here have proven helpful to other QuickFill users, and we hope they’ll serve as guidelines to help get you started. As time goes on, of course, you’ll develop procedures that best suit your own company and work style. (Before you read this section, you’ll find it helpful to complete the tours of QuickFill as well as to review chapters 8-10.)

You’ll notice that many of our suggestions are geared toward helping you establish “tight” controls over your work. That’s why we emphasize that you spend a reasonable amount of time each day sorting mail and getting accurate counts of orders, payments, and so forth.

Daily tasks

1. Open and sort your subscription-related mail.
   A. Separate into six categories
      i. new orders with payment
      ii. new orders without payment
      iii. payments
      iv. renewals with payment
      v. renewals without payment
      vi. miscellaneous transactions

      Note: If you use the audit system, you should also sort your controlled subscriptions and requalifications.

   B. If you have a lot of mail in the “miscellaneous” category, you might want to sort it by the type of transaction—address change, suspension, refund, and so forth.

   C. Sort categories i through v into “batches,” which you can then enter into QuickFill.
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Work flows

As we saw in chapter 7, Transactions, a batch is simply a small bunch of transactions that you group by common features—payment type, payment amount, tracking code, and so forth. The more common features you have in a batch, the more information you can enter into the “batch header.” The more data you can enter in the header, the fewer keystrokes you’ll need to enter individual transactions. Fewer keystrokes, in turn, mean less work and, even more important, less chance for error. Remember that small batches—no more than 20 or 30 transactions—work best.

Try to sort your transactions as follows:

i. new orders by payment type, tracking code, and offer (price/term/premium combination)

ii. payments by payment type and amount

iii. renewals by payment type and offer

D. Prepare “batch tickets” for your batched transactions. Each ticket should include the batch number, the transaction type, the number of transactions in the batch, and the dollar total of all payments in the batch. Run an adding machine tape to total the payment amount (including cash, checks, and credit card charges) for each batch and enter that amount on the ticket. You won’t be able to fill in the batch number or the date you entered transactions until you fill in the QuickFill batch header form. When you’re done, file these tickets with your actual paperwork.

2. Decide on the most logical order for entering that day’s transactions. In part, the order will depend on your update schedule. Try to enter all payments you receive before running a billing update and all renewals before running a renewal update. Also enter address corrections before you run any updates.

3. If you plan to print batch reports as you post each batch—a procedure we recommend—make sure your printer is turned on. You should also get into the habit of checking the amount of disk space you have available, particularly before running updates. You need about 2,000 bytes free on your hard disk for each bill or renewal notice. Labels require about 300 bytes each.

4. Start QuickFill. Make sure that the system date, which you’ll see in the lower right-hand corner of your screen, is correct. If it isn’t, quit QuickFill, correct the date, and restart. If you have an open miscellaneous batch from a previous day, close it before you begin the day’s work.

5. Select ‘Issues’ under ‘Definitions’ on the main menu. Check to ensure the “Current” and “New orders” issue pointers are correct. Remember, you can change these pointers independently of one another.
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Work flows

6. Enter your transactions.

7. Back up your database. It’s critical to back up your database at the end of each day or in the morning before you start that day’s work. On days that you run one or more updates—in addition to entering transactions—back up your database more than once.

Say you enter transactions in the morning and plan to run updates in the afternoon. In this case, back up your database after you’ve finished entering the transactions, then back it up again after you’ve run your updates.

QuickFill warns you to back up your database every time you run an update, do a journal extract, or close a period or year. These warnings are important—DO NOT IGNORE THEM!

8. File your backup disks.

Don’t leave your backups lying around your computer. They’re your only insurance against disaster. If all your backups and your computer are in one spot, and an overhead water pipe bursts, all your records will disappear down the same drain.

9. File your paperwork. We strongly recommend that you file all paperwork in batches. You may want to file in batch number order. Or you might want to first separate your paperwork into new orders, renewal orders, payments, and miscellaneous transactions, then file in batch number order.

10. Decide how you want to use the batch reports QuickFill produces. You may want to keep the reports in a binder so that they’ll be available for quick reference. Or you might want to file them with the actual paperwork—the order forms, invoice slips, renewal notice slips, and so forth—from the batch. If you decide on the latter course, you’ll want to print each batch report as soon as the batch is completed.

Updates

You can run any of the updates as often as you want.

QuickFill bills or sends “by days” renewal notices to individual subscribers according to the number of days you entered in the ‘Next’ field when you defined the billing or “by days” renewal series. (Note, the renewal notices for “by issues” renewal series are produced by the ‘Issue labels’ update.) So, you may want to run these updates weekly, even though you bill a subscriber or send renewal notices on a monthly basis.

If you do your own mailings, you’ll probably find it helpful to deal with smaller, weekly batches of bills or renewal notices, rather than larger, once-a-month batches.
Appendix B

Work flows

You can run the ‘Issue labels’ update as often as you want without changing the “Current” issue pointer. The ‘Issue labels’ update won’t produce the same label twice.

Say you run the ‘Issue labels’ update for a particular issue, then enter new orders that begin with the same issue. When you run the ‘Issue labels’ update, you’ll get labels for only the new orders. This means that you can fulfill the critical first issue for a new order the day you enter it. (The same applies if you run the ‘Issue labels’ update to generate labels for subscribers you have reinstated or for lapsed subscribers you have renewed and want to backstart with that issue.)

Setting up a schedule

In setting up your schedule for running updates, consider that running one type of update may affect another. Specifically, keep in mind the following:

1. QuickFill begins sending “by days” renewal notices when a subscriber has a specified number of issues remaining in his or her subscription. Say you run an ‘Issue labels’ update before you run a ‘Renewal notices’ update. In this case, QuickFill is likely to generate more renewal notices than if you ran the ‘Renewal notices’ update first. The reason: More subscribers will have received enough issues to qualify for a renewal notice.

2. QuickFill will not bill unpaid new orders until it’s produced the first issue label unless the ‘send first bill’ field is set to ‘I’. (This field appears in the publication definition billing tab under ‘Definitions’, ‘Publications’.) So if you run the ‘Issue labels’ update before the billing update, you may get more bills than if you ran the billing update first. That’s because any subscribers to whom you have sent first issues may now be eligible for bills.

3. When you run the billing update, QuickFill may suspend or cancel customers for nonpayment. If you run the ‘Issue labels’ update before you run the billing update, you may get more issue labels than if you ran the billing update first.

Set up an update schedule for four to six months at a time. Make sure you take into account the time you’ll need for printing and mailing.

The amount of time you’ll need to run each update—and to print bills, renewal notices, and issue labels—depends on your computer, your printer, and the size of your database. So the first time you run an update or print a set of bills or renewal notices, record how long it takes. Then you’ll have the information you need to fine-tune your schedule. If you choose ‘Run later’ for updates and then run them as part of a job list, the ‘Scheduled update run’ report will include the time at which the update began and the time at which it finished.
Appendix B

Work flows

You can specify the date you want printed on bills and renewal notices when you run the update. Your update schedule should contain the date you want to run the update, as well as the date you want to print on the forms.

Double-check your renewal and billing update schedule against the number of days you entered in the ‘Next’ fields of your renewal and billing series.

Reports

You can run reports whenever you want, in whatever order you want. The reports always give you up-to-the-minute data.

Experiment with the reports at first. As you become more familiar with the information they provide, you can decide which you want to see regularly and which you want to review on an “as needed” basis.

Accounting

Under standard accounting procedures, you close the period or year at the end of each period of your fiscal year. If you plan to run an update on the last day of an accounting period, discuss with your accountant whether to close the period before or after running the update.

Remember to always back up your database before you close the period or year. This backup copy of the database should be archived together with the period-closing report. Don’t reuse the backup disks or tape containing the period-end or year-end database. That is so that if you need to answer any questions about particular entries in the general ledger, you can restore the database and research the problem.

Calendar items

We recommend that you record these QuickFill “to do” tasks under the appropriate dates on a scheduling calendar:

1. Run ‘Issue labels’ updates. Also record on your calendar the “Current” issue number you’re using for each ‘Issue labels’ update. If you’re sending a bill with the first issue or using “by issues” renewals, record the date you want to print on the bills and/or renewal notices if it’s different from that of the system date.

2. Print issue labels.

3. Run billing updates—include the date you want to print on your bills.

4. Print bills.

5. Run ‘Renewal notices’ updates—include the date you want to print on your notices.

6. Print renewal notices.

7. Advance the “New orders” issue pointer from #x to #y.

8. Advance the “Current” issue pointer from #x to #y.

QuickFill
Appendix B

Work flows

9. Run journal extractions.
10. Run period close.
11. Run year-end close.
12. Make special backups that you’ll save, rather than recycle.
13. Run reports you want to review regularly.
Appendix C

Form Samples

- Simple bills
- Simple renewal notices
- Detailed bills
- Detailed renewal notices
- Combination bills
- Ordering your forms
Form Samples

QuickFill prints order acknowledgements, bills and renewal notices on forms that you can order through Artina. (See the end of this appendix, p. C.22, for ordering information.) In this section, we describe each line of the simple bills and renewal notices. We also review how QuickFill knows what to print and where to print it. This information can prove helpful if you want to “customize” standard bills and renewal notices.

When we use the word customize here, we’re not referring to the custom forms you can create by using the QuickFill Form Designer (see chapter 14, Printing, p. 14.8) or QuickFill’s mail-merge files and your word processor (see appendix D, Mail Merge). Rather, we’re suggesting that you may want to suppress entries on some lines of the simple forms or alter others to suit your own needs. The information in this section helps you do so. You’ll see that each number in the text corresponds to a number on the standard form illustrations on pp. C.3 and C.9. So you can easily follow along.

In addition to the sample simple forms on pp. C.3 and C.9, we have also included a sample detailed bill, detailed renewal notice, and combination bill on pp. C.16, C.18, and C.20. The detailed forms are similar to the simple forms with the exception that they include a list of the ship-to customers who belong to a gift or group subscription and that they are designed for printing on 8 ½” x 11” pages. The combination bill is a variation of the standard bill and is used for billing multiple items on a single bill. It is printed on the same form as standard bills.
If you select ‘Billing’ under ‘Definitions’ on the main menu, and then select ‘Packages’ and go into a package definition, you’ll see the ‘Bill format’ fields. If you leave ‘Simple (formerly called the short form)’ selected, QuickFill will
produce bills in the simple format for any billing effort that uses this package. These are the bills we describe on the following pages.

Note: order acknowledgements

Simple form order acknowledgements created by the ‘Order acknowledgements’ report and the ‘Replacement acknowledgement’ transaction use almost the same format as shown below. The difference is that the amount due is always zero and there are two lines added which describe how and when the order was paid. Also, the credit card block, “check payable to” line, and the amount and term lines at the bottom right are omitted.

1 Company address and phone number

The entries you see on these lines depend on whether you selected the ‘Print company name on bills’ field in the ‘Companies’ screen (under ‘Definitions’). If this field was left blank, these six lines will be blank. (You’d leave this field blank if you have your company data preprinted on the standard forms.)

If you checked this field, the six lines contain the data you entered in the company name field; the two-line address; the city, state, zip, and country fields; and the phone field of the ‘Companies’ screen. If this address information takes up fewer than six lines, QuickFill produces blank lines after the filled-in lines.

2 Publication name

The name on these lines comes from the name you entered in the ‘Publication name’ field of the publication definition general tab (under ‘Definitions’). The lines break just the way you entered them, and each line has a maximum of 30 characters. You can specify whether or not you want the publication name to be printed on the top and/or bottom portions of your bills on the ‘Defining billing series’ screen.

3 Billing address

The name and address depend, of course, on the specific customer you’re billing. But they also depend on your entry in the ‘Send to ship-to’ field on the ‘Billing Series’ screen (under ‘Definitions’).

QuickFill provides up to six lines that match the mailing label image you see when you use ‘Lookup’ to get details on a customer. If you leave the ‘Send to ship-to’ field in the ‘Billing Series’ screen blank, QuickFill produces the address of the “bill-to” customer for the order you’re billing. If you checked the ‘Send to ship-to’ field, and the subscription is a two-party subscription, QuickFill produces the address of the “ship-to” customer. If this is a group subscription, QuickFill always sends the bill to the “bill-to” customer, regardless of what you
entered in the ‘Send to ship-to’ field. Agency orders, however, are always billed to the agency address you filled in on the ‘Agencies’ screen (under ‘Definitions’).

4 Message block one
The content of these four lines depends on what you entered in the ‘1st message’ field on the ‘Billing Series’ screen (under ‘Definitions’).

5 Message block two
The content of these four lines depends on what you entered in the ‘2nd message’ field on the ‘Billing Series’ screen (under ‘Definitions’).

6 Date
This is the date that was in the ‘Date the bills…’ field on the update screen at the time you ran the billing update. The format of the date is specified by your entry in the ‘Date format’ field in the ‘Preferences’ screen (under the ‘Definitions’ menu).

7 Order number and effort number
This is the order number of the order you’re billing and the effort number for this particular bill. The order number comes first, followed by a dash. After the dash, you’ll see a ‘B’ followed by the effort number, which is a number from 0 to 8. (Your first bill in a series is effort number 1, the second is effort number 2, and so forth. Cancel bills have an effort number of 0.) If an order number has eight digits, then the dash that separates the order number and the ‘B’ is suppressed to make room for the order number on the standard form.

8 Federal tax ID text and number
If you entered a number in the ‘Federal tax ID number’ field on the ‘Companies’ screen (under ‘Definitions’), this line contains “Fed tax id:” followed by the number you entered. Otherwise, this line is blank.

9 Purchase order text and Purchase order number
If the order you’re billing has a purchase order number, you’ll see “P.O. Number:” followed by the purchase order number on this line. Otherwise, the line is blank.
Appendix C

Simple bills

10 Expiration date

This line contains the “expire issue” date of the order you’re billing. For books and conferences, only the expiration issue date is printed. For periodicals and services, the expiration issue date is preceded by the text “This bill for service through.” For memberships, the text “This bill for membership through” precedes the expiration issue date.

11 Ship-to address

For single subscriptions, two-party subscriptions, and agency subscriptions, this section contains the full shipping address. For group subscriptions, the names of the ship-tos are listed. If there are more than six names, then only five names are listed and the words “and others” appear on the last line.

12 Term description, price, shipping, tax, credit, and total

The term description is the number of issues followed by the number of copies—for example “12 issues, 2 copies.” If either quantity is 1, then it is omitted. If both are 1, then only the words “1 copy” are printed.

The wording of the term is changed slightly if you indicated that the publication is something other than a periodical on the publication definition general tab. For services and memberships the number of issues is never printed. For conferences the word “issues” is replaced with “sessions” and the word “copies” is replaced with “persons.” For memberships the word “copies” is replaced with “members.” For online services the word “copies” is replaced with “users.”

The price at the end of the first line comes from the price field of the order you’re billing. The price is for the term and quantity but does not include shipping charges, sales tax, or credits.

The shipping code description (for example, “First-class postage”), with two exceptions, comes from the shipping code descriptions the ‘Shipping’ tab of the ‘Publications’ definition screen.
The exceptions:

1. The order you’re billing is a group order, and you’ve used more than one shipping code with a nonzero shipping charge. In this case, the description will appear as simply “Shipping.” (That’s because in this case there’s no room to specify more than one type of shipping—for example, “airmail” and “first-class.”)

2. The order you’re billing uses a shipping code for which you’ve provided no description. Again, in this case, the description appears as simply “Shipping.”

You’ll see a shipping charge, if there is one, in this space. If there is no shipping charge, you’ll see “N/C.”

The “Tax” line prints only if you’re charging sales tax for this order.

The “Total” line contains the subtotal of the price, shipping charges, and tax.

The “Credit” line prints only if the customer has a credit.

The “Amount due” is the “Total” amount minus any credits.

Credit card info

Whether you have text in this space depends on whether you selected the ‘Print credit card info block on bill?’ field on the ‘Billing Packages’ screen (under ‘Definitions’). If you left this field blank, this space will be blank. If you checked this field, these lines will appear just as you see them. However, a credit card company’s name will only appear if you have entered a merchant ID for them on the ‘Companies’ definition screen.

Check payable to text

If you entered a name in the ‘Checks payable to’ field on the publication definition general tab (under ‘Definitions’), this line contains “Check payable to:” followed by the company or publication name you entered. For customers in Canada, Great Britain, United Kingdom, England, Scotland, or Wales, the spelling of “check” is changed to “cheque.” If you didn’t enter a name in that field, this line is blank.

Form title

The content of these two lines depends on what you entered in the first line of the ‘Document descriptors’ fields on the ‘Format’ tab of the billing series definition screen. Usually the words “Subscription Invoice” are used for standard bills. For combination bills the items ordered may be more than just
Appendix C

Simple bills

subscriptions, so only the second word is used, resulting in just the word “Invoice”.

16 “Please return this portion” and “FOR YOUR RECORDS” text

The “Please return this portion.” and the “FOR YOUR RECORDS” text can be changed or removed by editing the second and third lines of the ‘Document descriptors’ fields on the “Defining Billing Series” screen (under ‘Definitions’).

17 Publication code

This is the publication code, as specified on the publication definition screen. Having the publication code on the return half of the bill can be helpful when trying to locate the order.
If you select 'Renewal' under 'Definitions' on the main menu, then select 'Packages' and go into a package definition, you’ll see the ‘Printed notice format’
Appendix C

Simple renewal notices

If you leave ‘Simple (formerly called the short form)’ selected, QuickFill will produce renewal notices in the simple format for any renewal effort that uses this package. These are the notices we describe below.

Note: blanket renewals
Blanket renewals created by the ‘Standard blanket renewals’ report are printed in the same format as simple renewal notices.

1. Company address and phone number

The entries you see on these lines depend on whether you selected the ‘Print company name on renewals?’ field in the ‘Companies’ screen (under ‘Definitions’). If this field was left blank, these six lines will be blank. (You’d leave this field blank if you have your company data preprinted on the standard forms.) If you checked this field, the six lines contain the data you entered in the company name field; the two-line address; the city, state, zip, and country fields; and the phone field of the ‘Companies’ screen. If this address information takes up fewer than six lines, QuickFill produces blank lines after the filled-in lines.

2. Publication name

The name on these lines comes from the name you entered in the ‘Publication name’ field of the publication definition general tab (under ‘Definitions’). The lines break just the way you entered them, and each line has a maximum of 30 characters. You can specify whether or not you want the publication name to be printed on the top and/or bottom portions of your renewal notices on the “Defining Renewal Series” screen.

3. Renewal mailing address

The address the renewal is sent to depends on your entries in the following fields:

1. The ‘Send to ship-to’ field on the ‘Renewal series’ screen (under ‘Definitions’).
2. The ‘Send notice to’ field in the “Agency subscriptions” section on the same screen.

QuickFill provides up to six lines that match the mailing label image you see when you use ‘Lookup’ to get details on a customer. If you leave the ‘Send to ship-to’ field in the ‘Renewal series’ screen blank, QuickFill produces the address of the “bill-to” customer for the order you’re renewing. If you checked the ‘Send to ship-to’ field, and the subscription is a group or a two-party subscription, QuickFill produces the address of one of the “ship-to” customers. If you elected
Appendix C

Simple renewal notices

To send renewal notices to the agency on the ‘Renewal series’ screen, then QuickFill inserts the agency address you filled in on the ‘Agencies’ screen.

4 Message block one

The content of these four lines depends on what you entered in the ‘1st message’ field on the ‘Renewal series’ screen (under ‘Definitions’).

5 Message block two

The content of these four lines depends on what you entered in the ‘2nd message’ field on the ‘Renewal series’ screen (under ‘Definitions’).

6 Date

This is the date that was in the ‘Date the renewal notices...’ field on the update screen at the time you ran the renewal notices update. The format of the date is specified by your entry in the ‘Date format’ field in the ‘Preferences’ screen (under ‘Definitions’).

7 Order number and effort number

These are the order number of the order you’re renewing and the effort number for this particular notice. The order number comes first, followed by a dash. After the dash, you’ll see an ‘R’ followed by the effort number, which is a number from 1 to 12. (Your first renewal notice in a series is effort number 1, the second is effort number 2, and so forth. For renewal notices produced by the ‘Blanket renewals’ report an ‘X’ is used in place of an effort number.) If an order number has eight digits or a notice is for effort 10, 11, or 12, then the dash that separates the order number and the ‘R’ is suppressed to make room for the order number or effort number on the standard form.

Each renewal effort can include up to five offers. On QuickFill’s standard renewal notices, you can see full pricing details for one offer—the “detail” offer. For the remaining offers for which the order you’re renewing qualifies (there can be up to four), QuickFill prints only summaries of the pricing. We describe these offer lines below (the detail offer comes first).

8 Federal tax ID text and number

If you entered a number in the ‘Federal tax ID number’ field on the ‘Companies’ screen (under ‘Definitions’), this line contains “Fed tax id:” followed by the number you entered. Otherwise, this space is blank.
Appendix C

Simple renewal notices

9 Purchase order text and purchase order number

If the order you’re renewing has a purchase order number and the ‘Print purchase order number of prior order on the notices’ field (on the “Defining Renewal Series” screen) has a check mark in it, you’ll see “P.O. Number:” followed by the purchase order number on this line. Otherwise, the line is blank.

10 Expiration date

This line contains the “expire issue” date of the order you’re renewing. For books and conferences, this line is omitted.

11 Ship-to address

For single subscriptions, two-party subscriptions, and agency subscriptions, this section contains the full shipping address. For group subscriptions, the names of the ship-tos are listed. If there are more than six names, then only five names are listed and the words “and others” appear on the last line.

12 Term description, quantity, price, shipping, tax, credit and total

The term description comes from the entry you made in the ‘Term description’ field in the ‘Offers’ screen (under ‘Definitions’). If you left this field blank, the term of the order you’re renewing appears as the number of issues followed by the number of copies—for example “12 issues, 2 copies.” If either quantity is 1, then it is omitted. If both are 1, then only the words “1 copy” are printed.

The wording of the term is changed slightly if you indicated that the publication is something other than a periodical on the publication definition general tab. For services and memberships the number of issues is never printed. For conferences the word “issues” is replaced with “sessions” and the word “copies” is replaced with “persons.” For memberships the word “copies” is replaced with “members.” For online services the word “copies” is replaced with “users.”

If you are using unit pricing:

QuickFill calculates the price by using the offer’s price, term, and the number of copies in the order you’re renewing.

If you are using stepped pricing:

QuickFill calculates the price by summing the prices and quantities for each of the price breaks up to the quantity level of the subscription. For example, say that a subscription for 15 copies is being renewed and the offers are:
Appendix C

Simple renewal notices

<table>
<thead>
<tr>
<th>Min quantity</th>
<th>Price per copy</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>100.00</td>
</tr>
<tr>
<td>6</td>
<td>90.00</td>
</tr>
<tr>
<td>10</td>
<td>80.00</td>
</tr>
<tr>
<td>20</td>
<td>70.00</td>
</tr>
<tr>
<td>30</td>
<td>60.00</td>
</tr>
</tbody>
</table>

The detailed pricing section of the renewal notice would look like this:

One year
Copies 1-5 @ 100.00 500.00
Copies 6-9 @ 90.00 360.00
Copies 10-15 @ 80.00 480.00
--------
Total for 15 copies 1340.00

Addtl copies 16-19 : 80.00 each
Addtl copies 20-29 : 70.00 each
Addtl copies over 29 : 60.00 each

If the notice is going to an agency, QuickFill calculates the price based on the renewal discount rate for the agency.

The shipping code description (for example, “First-class postage”), with two exceptions, comes from the shipping code descriptions on the ‘Shipping’ tab of the ‘Publications’ definition screen.

These are the exceptions:

1. The order you’re renewing is a group order, and you’ve used more than one shipping code with a nonzero shipping charge. In this case, the description will appear simply as “Shipping.” (That’s because in this case there’s no room to specify more than one type of shipping—for example, “airmail” and “first-class.”)

2. The order you’re renewing uses a shipping code for which you’ve provided no description. Again, in this case, the description appears simply as “Shipping.”

QuickFill calculates shipping charges for the order you’re renewing by using the term of the detail offer and the quantities and shipping codes for each ship-to customer. If there are no shipping charges, the shipping line is omitted.

QuickFill calculates the tax by using the term and price from the detail offer and the quantity and tax jurisdictions for each ship-to customer.

The “Credit” line prints only if the customer has a credit.
Appendix C

Simple renewal notices

If the detail offer is for a minimum quantity of 1, the total amount is labeled “Total”; otherwise the total amount is labeled “Total for x copies,” where “x” represents the minimum quantity.

13 Nondetailed offer—term description and price, offer message

The term description for a nondetailed offer is constructed in the same manner as the detailed offer. See item 12 above.

For unit pricing, the price QuickFill prints is the per-copy price calculated by using this offer. For stepped pricing, the only time you will get nondetailed offers shown on the renewal notice is when you have linked offers with more than one term to the renewal effort.

For single and two-party subscriptions, the per-copy price includes sales tax and shipping charges. However, the per-copy price doesn’t include sales tax or shipping charges for group subscriptions. Also, the price, in both cases, doesn’t reflect credit amounts.

14 Credit card info

Whether you have text in this space depends on whether you selected the ‘Print credit card info block on notice’ field on the ‘Renewal packages’ screen (under ‘Definitions’). If you left this field blank, this space will be blank. If you checked this field, these lines will appear just as you see them. However, a credit card company’s name will only appear if you have entered a merchant ID for them on the ‘Companies’ screen.

15 Checks payable to text

If you entered a name in the ‘Checks payable to’ field on the publication definition general tab (under ‘Definitions’), this line contains “Check payable to:” followed by the company or publication name you entered. For customers in Canada, Great Britain, United Kingdom, England, Scotland or Wales, the spelling of “check” is changed to “cheque.” If you didn’t enter a name in that field, this line is blank.

16 Form title

The content of these two lines depends on what you entered in the first line of the ‘Document descriptors’ fields on the “Defining renewal series” screen.
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Simple renewal notices

17 “Please return this portion” and “FOR YOUR RECORDS” text
The “Please return this portion.” and the “FOR YOUR RECORDS” text can be changed or removed by editing the second and third lines of the ‘Document descriptors’ fields on the “Defining Renewal Series” screen (under ‘Definitions’).

18 Publication code
This is the publication code, as specified on the publication definition screen. Having the publication code on the return half of the renewal can be helpful when trying to locate the order.
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Detailed bills

You will see a sample of a detailed bill on the following page. This form is similar to the simple form with the exception that it includes a list of the ship-to customers who belong to a gift or group subscription and it is designed for printing on 8½” x 11” pages. Up to eight ship-to addresses can fit on one page, but QuickFill will generate multiple pages if necessary.

Note: messages for long forms

When defining messages for billing series that generate detailed forms, at least one message per effort should contain instructions for making changes to the ship-to addresses or adding ship-tos as well as instructions to send the entire form back when changes are made.

If you select ‘Billing’ under ‘Definitions’ on the main menu, and then select ‘Packages’ and go into a package definition, you’ll see the ‘Bill format’ field. If you set this field set to ‘Detailed (for gifts and groups) (formerly called the long form)’, QuickFill will produce bills in the detailed format for any billing effort that uses this package. These bills will look like the sample bill on the following page.

Note: order acknowledgements

Detailed order acknowledgements created by the ‘Order acknowledgements’ report and the ‘Replacement acknowledgement’ transaction use almost the same format as shown on the following page. The difference is that the amount due is always zero and there are two lines added which describe how and when the order was paid. Also, the credit card block, “check payable to” line, and the amount and term lines at the bottom right are omitted.
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Detailed bills
Appendix C

Detailed renewal notices

You will see a sample of a detailed renewal notice on the following page. This form is similar to the simple form with the exception that it includes a list of the ship-to customers who belong to a gift or group subscription and it is designed for printing on 8 ½" x 11" pages. Up to eight ship-to addresses can fit on one page, but QuickFill will generate multiple pages if necessary.

Note: messages for long forms

When defining messages for renewal series that generate detailed forms, at least one message per effort should contain instructions for making changes to the ship-to addresses or adding ship-tos as well as instructions to send the entire form back when changes are made.

If you select ‘Renewal’ under ‘Definitions’ on the main menu, then select ‘Packages’ and go into a package definition, you’ll see the ‘Printed notice format’ field. If you set this field set to "Detailed (for gifts and groups) (formerly called the long form)", QuickFill will produce renewal notices in the detailed format for any renewal effort that uses this package. These notices will look like the sample notice on the following page.

Note: blanket renewals

Blanket renewals created by the ‘Gift blanket renewals’ report are printed in the same format as detailed renewal notices.
## Appendix C

### Detailed renewal notices

<table>
<thead>
<tr>
<th>Subscription Renewal</th>
<th>Publication Name</th>
<th>Date/Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXX</td>
<td>XXXX</td>
<td>1123456789-R1</td>
</tr>
</tbody>
</table>

Company address goes here

(800) 622-7702

Renewal mailing address goes here

**FOR YOUR RECORDS**

Fed tax ID: 12-3456789
P.O. Number: 123456789012345

---

This renewal is for the addresses listed below. If you wish to make any changes please do so and return this entire page.

<table>
<thead>
<tr>
<th>1st ship to address</th>
<th>4th ship to address</th>
</tr>
</thead>
<tbody>
<tr>
<td>2nd ship to address</td>
<td></td>
</tr>
<tr>
<td>3rd ship to address</td>
<td></td>
</tr>
</tbody>
</table>

Please make any necessary corrections to the address below:

- 12 issues $111,000.00
- First class postage $11.11
- Tax $11.11
- Credit $11.11
- Total $111,000.00
- 24 issues $222,222.22
- 36 issues $333,333.33
- 12 issues $100,000.00 per copy, Minimum 2
- 12 issues $100,000.00 per copy, Minimum 5

MC/VISA/AMEX Number

Expiration Date

Signature

Check payable to: Your Company Name, Inc.

Please return this portion. Order Numbers: 123456789-R1

Page 1 of 2

User's Guide

C.19
Combination bills

Combination bills are a variation of the standard bill and are used for billing multiple items on a single bill. The list of items ordered appears on the bottom half of the bill, whereas the messages, which usually appear on the bottom half, are moved to the top half. With the exception of the two numbered sections in this sample combination bill, the remaining data on the bill comes from the same sources as the data on standard bills.
Appendix C
Combination bills

1 Ship-to names
The names of the persons to which the items ordered are being shipped are listed in this area. Not all of the items are necessarily shipped to all of these names—each order may be shipped to a different person or persons. If there are more than six unique names then only five names are listed and the words “and others” appear on the last line.

2 Order items
This area contains the list of items that were ordered. The name of each publication ordered appears, together with the term of the subscription and the expiration date (for subscriptions) and the price. For publications other than periodicals the wording changes appropriately.

At the end of the list of items appears the total shipping charge and sales tax for all items ordered followed by the total amount due. The total amount due also appears on the top half of the bill (the portion that should be returned with the payment).
Ordering your forms

You can order standard forms for acknowledgements, bills and renewals from:

Artina – CWC Forms Division
PO Box 681
Tarrytown, NY 10591

Phone: 800-544-3427 or 914-592-8616
Fax: 800-261-1499

Continuous 8.5” x 7” forms
  Form 120-S1 (1 part)
  Form 120-S2 (2 part)
  Form 120-S3 (3 part)
  Use with companion envelope #44-808

Continuous 8.5” x 11” forms
  Form 006-S1 (1 part)
  Form 006-S2 (2 part)
  Form 006-S3 (3 part)
  Use with companion envelope #44-909

Sheet-fed 8.5” x 7” forms (includes 4” blank tear off section at bottom)
  Form 120L
  Use with companion envelope #44-808

Sheet-fed 8.5” x 11” forms
  Form 006L
  Use with companion envelope #44-909
Appendix D

Mail Merge

- Overview
- Mail-merge bills
- Mail-merge renewal notices
Mail Merge

Overview If you don’t want to use the standard format for all—or any—of your bills, blanked renewals, order acknowledgments, or renewal notices, you have two alternatives:

1. Change the standard format using the QuickFill Form Designer application (see chapter 14, Printing, p. 14.8). Using this approach you will be able to print your customized bills and renewals from the ‘Print saved reports’ screen without the use of any additional software. See the Form Designer’s help file for more information.

2. Use the mail-merge facility of your word processor and the mail-merge files QuickFill provides. In your word processor you create one or more document files that you’ll “merge” with the QuickFill files to produce bills and notices.

Setting up mail-merge bills When you select ‘Billing’ under ‘Definitions’ on the main menu, and then select ‘Packages’. You’ll notice on the ‘Billing packages’ screen the ‘Mail-merge’ and ‘Mail-merge format code’ fields. When you select the ‘Mail-merge’ field and enter ‘MMERG1’, ‘MMERG2’, ‘MMERG3’, or ‘MMERG4’ in the ‘Mail-merge format code’ field, QuickFill produces a mail-merge file for any billing effort that uses this package.

Setting up mail-merge renewal notices To tell QuickFill to produce mail-merge renewal notice files (including blanket renewals), select ‘Renewal’ under ‘Definitions’ on the main menu, then select ‘Packages’. You’ll notice at the bottom of the ‘Renewal packages’ screen the ‘Mail-merge’ and ‘Mail-merge format code’ fields. When you select ‘Mail-merge’ for the notice format and enter ‘MMERG1’, ‘MMERG2’, ‘MMERG3’, or ‘MMERG4’ in the ‘Mail-merge format code’ field, QuickFill produces a mail-merge file for any renewal effort that uses this package.
Appendix D

Mail merge

Setting up mail-merge order acknowledgements

The format for order acknowledgements depends on the ‘Bill format’ for the first billing effort in the billing series used to create the acknowledgements. To create mail merge order acknowledgements, link the series to a billing package that has a ‘Bill format’ of “Mail-merge” and “MMERG1,” “MMERG2,” “MMERG3,” or “MMERG4” in the ‘Mail-merge format code’ field.

File formats

QuickFill has the ability to produce four different formats (MMERG1, MMERG2, MMERG3 and MMERG4) for mail-merge bill and renewal notice files. The MMERG1 format contains the same data as the standard QuickFill bills that are printed from ‘Print saved reports’. The MMERG2 and MMERG3 formats contain all of the fields that are in the MMERG1 format, plus additional fields for postal presort. The MMERG4 format is similar to the MMERG3 format, but breaks the pricing data out into sets of separate fields. The detailed file layout for these formats is listed on the following pages.

Mail-merge templates

Sample mail-merge templates for MMERG4 bills, renewals (including blanket renewals), and order acknowledgements are provided with your QuickFill installation; they are located in your QuickFill program directory. These templates (BILL.DOT, RENEWAL.DOT, and ACK.DOT) are facsimiles of QuickFill’s standard bills, renewals, and order acknowledgements and are also used when ‘Mail merge’ is selected for replacement bills, renewals or acknowledgements. You can use them as they are or use them to create your own templates.

If you choose to create your own mail-merge templates (because you are not using the MMERG4 format or you decided to design your own forms), you should use the following naming convention in order to take advantage of QuickFill’s ability to automatically activate a mail-merge template and print or preview a mail-merge file. When searching for mail merge templates, QuickFill looks for files with a DOT or DOC extension that are located in your database directory (or in your program directory) that are named TTTTTTT_PPPPPP_FFFF.DOT where “TTTTTTT” is the type of file (“Bill,” “Renewal”—for regular and blanket renewal, or “Ack”—for acknowledgement), “PPPPPP” is the publication code, and “FFFF” is the form code (or “BLANK” if there is no form code). If a file is not found, QuickFill then searches for files named TTTTTTT_PPPPPP.DOT. If a file still is not found, QuickFill searches for files named TTTTTTT.DOT. If this final search fails, you will be asked to specify the mail merge template that you would like to use. (Refer to chapter 10, Reports, p. 10.18 for more information on printing or previewing mail merge files.)

Mail-merge preferences

On the ‘Mail merge’ tab of the Preferences screen you can specify some options for mail-merge files:
Appendix D

Mail merge

1. Specify whether you want to create dBASE or delimited mail merge files.
   The default mail merge format is comma delimited. You can specify other
   delimiters if you wish. Alternatively you can specify that you want dBASE
   files to be created. Microsoft Word versions 2002 and 2003 can be quite slow
   when processing comma-delimited files, so choosing dBASE format is a
   good idea if you have either of those versions of Microsoft Word.

   Note: field and record separators
   If you do want to change these values, you must “encode” them. That
   means that you enter characters that you can’t normally enter from the
   keyboard by typing a backslash (\), followed by a three-digit decimal
   code. So, if you want to use a carriage return and line feed as the record
   separator, enter \013\010. (For more on converting characters to
decimal codes, refer to “ASCII character chart” in QuickFill’s built-in
help system’s index.)

2. Specify whether you want to vertically center bill and renewal address lines.
   Vertically centering customers’ addresses helps to keep the addresses
   centered in envelope windows.

3. Specify whether you want to create separate files for each publication.
   If you use the MMERG4 format and would like QuickFill to create separate
   files for each publication, check the ‘Create separate mail merge files for each
   pub (applies to MMERG4)’ field.

4. Specify whether you want to vertically center renewal price data.
   The ability to center renewal price data only applies to the MMERG1,
   MMERG2, and MMERG3 formats when the mail-merge renewal file is for a
   publication that uses stepped pricing. (Renewal price data may be centered
   for the MMERG4 format regardless of a publication’s pricing method.)

Location of the mail merge files
QuickFill saves the mail-merge bill files it produces in the mail merge directory
displayed on the ‘About QuickFill’ screen. It assigns names for these files in the
format Bills_xxxxxx_nnn.txt for delimited files and BILLnnn.DBF for dBASE files
(xxxxxx is a publication code and nnn is a number). QuickFill saves mail-merge
files for renewal notices in the same directory with file names in the format
Renews_xxxxxx_nnn.txt for delimited files and RENnnn.DBF for dBASE files.

Printing mail-merge bills or renewal notices with differing formats
If you want to use several different forms for your mail-merge bills or renewal
notices, QuickFill has to produce one mail merge file for each form. So you use a
unique “Form set code” on the ‘Billing packages’ screen or ‘Renewal packages’
screen for each form.
Appendix D

Mail merge

Here’s an example. Say you’ve designed two mail-merge forms—one for your active bills and one for your cancel bills. Now you define two billing packages—you might call the package for your active bills BILACT and the one for your cancel bills BILCAN. You select the ‘Mail-merge’ field and select one of the mail merge format codes in the ‘Mail-merge format code’ field for both packages. For the BILACT package, you enter ACT1, say, in the ‘Form set code’ field. And for the BILCAN package, you enter CAN1. When you run your billing update, QuickFill produces separate mail-merge files for ACT1 and CAN1. Now you can use different document files when you use your word processor to print these mail-merge files.

Technical details

Points to remember…

- All fields are left justified unless they are dollar ($) amounts, in which case they are right justified with a field length of 10. All dollar amounts have a decimal point in the 8th position. For example, $59.50 looks like this:

  " 59.50"

  If you are using fixed pitch fonts, this formatting allows you to specify the left-hand edge of a column of dollar fields and have all the decimal points line up. (Note, if you are using variable pitch fonts, you can get the decimal points in the dollar amount fields to line up by using the decimal point tab feature of Microsoft Word.)

- The first record QuickFill produces for all delimited mail-merge files includes field names.

- The second record QuickFill produces for both the billing and renewal notice mail-merge files is a “dummy.” This dummy record identifies your company and phone number just as you entered them on the update screens. These identifications are intended for your mailing house. The third record is another dummy that identifies the publication, form set code, and package. Each time a package changes, QuickFill produces another dummy record identifying the new package, publication, and form.

- If your publication or Form set code changes, QuickFill produces an entirely new mail-merge file.

  This identifying information appears in the customer address fields of the dummy records. QuickFill uses the address fields because any mail-merge document you design is bound to include the address.

What follows is a description of the fields in QuickFill mail-merge files.
Bills and order acknowledgements

File contents by field

There are four possible mailmerge output formats for bills and acknowledgements, named MMERG1, 2, 3 and 4. MMERG4 is the most recently designed format and we recommend that new QuickFill users choose this format. The MMERG1, 2 and 3 formats are increasingly expansive: the MMERG2 format contains everything that the MMERG1 format has plus additional fields that make it possible to do a postal presort on the file. The MMERG3 format contains everything that the MMERG1 and MMERG2 formats have plus it has all of the address fields split out into their individual components.

**MMERG1 format**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECNUM</td>
<td>Record number</td>
</tr>
<tr>
<td>COMADDR1-5</td>
<td>Company address</td>
</tr>
</tbody>
</table>

This field contains a sequential record number.

The entries in these fields depend on whether you selected the ‘Print company name on bills’ field in the ‘Companies’ definition screen. If you left the ‘Print company name on bills’ field blank, these first five fields will be blank. If you checked this field, these fields will contain the data you entered in the company ‘Name’ field; the two-line ‘Address’ field; and the city, state, zip, and country fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COMPHONE</td>
<td>Company phone</td>
</tr>
</tbody>
</table>

This field always contains the phone number you entered in the ‘Phone’ field on the ‘Companies’ definition screen.
Whether you get entries in the next three fields depends on whether you selected the ‘Print credit card info block on bill’ field on the ‘Billing packages’ definition screen. If you left the credit card block field blank, these three fields will be blank. If you selected this field by clicking on it once so that the circle next to it was filled in, you’ll see the following in these three fields:

CCBLOCK1  “_________________ ___/____”
CCBLOCK2  “AMEX/MC/VISA/DISC Exp Date”
CCBLOCK3  “Signature ____________________”

The CCBLOCK2 may not contain exactly the same card names shown above. The ones that are displayed depend on which merchant ID numbers you filled in on the ‘Companies’ definition screen.

ADDRESS1- Customer address
ADDRESS6

What you see in these fields depends on the specific order you’re billing, of course. It also depends on your entry in the ‘Send to ship-to’ field on the ‘Billing series’ definition screen.

These six fields match the mailing label image you see when you use ‘Lookup’ to get details on a customer.

If you leave the ‘Send to ship-to’ field blank, QuickFill produces the address of the “bill-to” customer for the order you’re billing. If you select the ‘Send to ship-to’ field by clicking on it once so that a check mark appears in it, QuickFill produces the address of the “ship-to” customer for a two-party subscription. (For a group subscription, QuickFill always addresses bills to the bill-to customer, regardless of whether you selected the ‘Send to ship-to’ field, and Agency orders are always billed to the agency address you filled in on the ‘Agencies’ definition screen.)

PUBCODE  Publication code

This field contains the code you entered on the publication definition general tab.

PUBNAME1- Publication name
PUBNAME2

The entries in these fields come from the name you entered in the ‘Publication name’ field of the publication definition general tab. If you do not want the publication name in these fields, clear the ‘Print publication name…’ fields on the “Defining billing series” screen.
Appendix D

Mail-merge bills and order acknowledgements

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DATE</td>
<td>Date of the bill. This field contains the date in the ‘Date the bills’ field that was on the update screen at the time you ran the update. The format of the date is specified by your entry in the ‘Date format’ field on the ‘Preferences’ screen.</td>
</tr>
<tr>
<td>ORDERNUM</td>
<td>Order number of the order you’re billing.</td>
</tr>
<tr>
<td>EFFORT</td>
<td>Effort number of the billing effort. For cancel bills, this field will contain “0.”</td>
</tr>
<tr>
<td>PONUMTEXT</td>
<td>Purchase order text. If the order has a purchase order number, you’ll see “P.O. Number:” in this field. If it doesn’t have a purchase order number, this field is blank.</td>
</tr>
<tr>
<td>PONUM</td>
<td>Purchase order number. If there is no number, this field is also blank.</td>
</tr>
<tr>
<td>TERMDESC</td>
<td>Term description. The term is printed as “12 issues, 2 copies.” If either quantity is 1, then it is omitted. If both are 1, then only the words “1 copy” are printed. The wording of the term is changed slightly if you indicated that the publication is something other than a periodical. For services and memberships, the number of issues is never printed. For conferences the word “issues” is replaced with “sessions” and the word “copies” is replaced with “persons.” For memberships the word “copies” is replaced with “members.” For online services the word “copies” is replaced with “users.”</td>
</tr>
<tr>
<td>PRICE</td>
<td>Price. The price comes from the offer for the order you’re billing. This price, which is determined by the term and quantity, does not include shipping charges, sales tax, or credits. The entry in this field is, of course, a dollar amount. All dollar amounts are right justified with a field length of 11 for negative numbers (11th position is “-“) and a field length of 10 for positive numbers (with no “+”). All dollar amounts also have a decimal point in the 8th position.</td>
</tr>
</tbody>
</table>

QuickFill
### Appendix D

#### Mail-merge bills and order acknowledgements

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>SHIPDESC</strong></td>
<td>Shipping description</td>
</tr>
<tr>
<td></td>
<td>In most cases, the entry in this field comes from the shipping code descriptions on the ‘Shipping’ tab of the ‘Publications’ screen.</td>
</tr>
<tr>
<td></td>
<td>The exceptions:</td>
</tr>
<tr>
<td></td>
<td>1. The order you’re billing is a group order and you’ve used more than one shipping code with a nonzero shipping charge. In this case, this field will contain the entry “Shipping.” (That’s because there’s no room to specify more than one type of shipping—for example, “airmail” and “first-class.”)</td>
</tr>
<tr>
<td></td>
<td>2. The order you’re billing uses a shipping code for which you’ve provided no description. Again, in this case, this field will contain the entry “Shipping.”</td>
</tr>
<tr>
<td><strong>SHIPCHARGE</strong></td>
<td>Shipping amount</td>
</tr>
<tr>
<td></td>
<td>This field contains the shipping charges (formatted as a dollar amount). If there are no shipping charges, the field contains six blank characters, followed by N/C (that is, “      N/C”).</td>
</tr>
<tr>
<td><strong>TAXDESC</strong></td>
<td>Tax text</td>
</tr>
<tr>
<td></td>
<td>If you’re charging sales tax for the order you’re billing, this field contains “Tax.” If not, the field is blank.</td>
</tr>
<tr>
<td><strong>TAX</strong></td>
<td>Tax amount</td>
</tr>
<tr>
<td></td>
<td>If you’re charging sales tax for this order, this field contains the tax, formatted as a dollar amount. If there’s no sales tax, this field is blank.</td>
</tr>
<tr>
<td><strong>SUBTOTAL</strong></td>
<td>Subtotal amount</td>
</tr>
<tr>
<td></td>
<td>This field contains the subtotal of the price, shipping charges, and sales tax, formatted as a dollar amount.</td>
</tr>
<tr>
<td><strong>CREDITTEXT</strong></td>
<td>Credit text</td>
</tr>
<tr>
<td></td>
<td>If there’s a credit, or partial payment, for the order you’re billing, this field contains “Credit.” If not, the field is blank.</td>
</tr>
<tr>
<td><strong>CREDIT</strong></td>
<td>Credit amount</td>
</tr>
<tr>
<td></td>
<td>If there’s a credit for this order, this field contains the credit, formatted as a dollar amount. If not, this field is blank.</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>Total amount</td>
</tr>
<tr>
<td></td>
<td>This field contains the subtotal amount minus the credit amount. The total amount is formatted as a dollar amount with a leading dollar sign ($).</td>
</tr>
</tbody>
</table>
Appendix D

Mail-merge bills and order acknowledgements

MESSAGE1A- MESSAGE1D
Message block one
The entries in these four fields depend on what you entered in the ‘1st message’ field on the ‘Billing series’ definition screen. Each field can be 40 characters long. (And each line can be used as a separate message.)

MESSAGE2A- MESSAGE2D
Message block two
The entries in these four fields depend on what you entered in the ‘2nd message’ field on the ‘Billing series’ definition screen. Each field can be 40 characters long. (And each line can be used as a separate message.)

EXPDATE
Expiration date
This field contains the “expire issue” date of the order you’re billing.

QUANTITY
Quantity
This field contains the number of copies this order receives.

SHIPADDR1- SHIPADDR6
Ship-to address
For group subscriptions, these fields contain the names of the ship-tos. If there are more than six names, then SHIPADDR1 through SHIPADDR5 contain the names of the first five ship-tos and SHIPADDR6 contains the words “and others.” For all other subscriptions these six fields contain the address of the ship-to customer.

PAYABLETXT
Payable to text
If you entered data in the ‘Checks payable to’ field on the publication definition general tab, this field contains “Check payable to:”. If not, this field is blank. (The spelling of “check” is changed to “cheque” if the bill is addressed to Canada, England, Scotland, Wales, United Kingdom, or Great Britain.)

PUBPAYABLE
Publication payable
This field contains the entry you made—if any—in the ‘Checks payable to:’ field on the publication definition general tab.

FEDTAXTXT
Federal tax ID text
If you made an entry in the ‘Federal tax ID number’ field on the ‘Companies’ definition screen, this field contains “Fed tax id #:”; if not, this field is blank.
Appendix D

Mail-merge bills and order acknowledgements

FEDTAXID  Company federal tax ID number
This field contains the entry you made—if any—in the ‘Federal tax ID number’ field on the ‘Companies’ definition screen.

PHONE  Customer telephone number (PHONE)
This field contains whatever phone number you entered for the customer to whom you’re mailing the bill. This field is useful if you use telephone collections for one of your billing efforts. You can create a custom mail-merge document with the telephone number. Then you can give this document to your telephone collections people as a lead.

SALUTATION  *Customer salutation
If you entered a salutation in the ‘Salutation’ field of the customer’s record, you’ll see that salutation in this field.

If you left the salutation field blank and entered a last name for the customer, QuickFill enters in this field the prefix you entered in the ‘Prefix’ field of the customer’s record, plus a space and the last name—for example, “Mr. Smith”.

If you left the salutation and the prefix fields blank, QuickFill enters the customer’s full name in this field.

If you left the salutation, prefix, and last name fields blank, QuickFill enters “Subscriber” in this field.

*Indicates customer and addressee fields that are either blank or contain zero when a bill is for an agency subscription.

MMERG2 format

If you select the “MMERG2” mail-merge format code in your billing package definitions, each record in your mail-merge file will include all of the “MMERG1” fields plus the following ones:

STREET  Addressee street1
This field contains the information entered on the first line of the address for the customer to whom the bill is being sent.

CITY  Addressee city
This field contains the city in which the customer to whom the bill is being sent lives.
Appendix D

Mail-merge bills and order acknowledgements

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>STATE</td>
<td>Addressee state</td>
</tr>
<tr>
<td>ZIP</td>
<td>Addressee zip or postal code</td>
</tr>
<tr>
<td>ZIP2</td>
<td>Addressee zip+2</td>
</tr>
<tr>
<td>CARRT</td>
<td>*Addressee carrier route</td>
</tr>
<tr>
<td>CNTRYCODE</td>
<td>*Addressee country code</td>
</tr>
<tr>
<td>CASSDATE</td>
<td>*Addressee CASS certification date</td>
</tr>
<tr>
<td>FAX</td>
<td>*Addressee fax number</td>
</tr>
<tr>
<td>EMAIL</td>
<td>*Addressee E-mail address</td>
</tr>
<tr>
<td>CUSAGENCY</td>
<td>Addressee customer number</td>
</tr>
</tbody>
</table>

This field contains the state in which the customer to whom the bill is being sent lives.

This field contains the zip or postal code for the customer to whom the bill is being sent.

This field contains the delivery point code for the customer to whom the bill is being sent.

This field contains the carrier route for the customer to whom the bill is being sent.

This field contains the country code for the country in which the customer to whom the bill is being sent lives.

This field contains the CASS certification date—if there is one—for the address of the customer you’re billing. If the customer’s CASS certification date is not in QuickFill, this field is blank.

This field contains whatever fax number you entered for the customer to whom you’re sending the bill. This field is useful if you fax bills for one of your billing efforts.

This field contains whatever e-mail address you entered for the customer to whom you’re sending the bill. This field is useful if you use e-mail to send bills for one of your billing efforts.

This field contains the customer number of the customer to whom the bill is being sent. If a bill is for an agency subscription, this field contains the agency code for the agency from which you received the subscription instead of a customer number.
Mail-merge bills and order acknowledgements

<table>
<thead>
<tr>
<th>SERIES</th>
<th>Billing series code</th>
</tr>
</thead>
<tbody>
<tr>
<td>This field contains the billing series code for the billing series to which the order belongs.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PACKAGE</th>
<th>Billing package code</th>
</tr>
</thead>
<tbody>
<tr>
<td>This field contains the billing package code associated with the billing series and effort number of the bill being sent to the customer.</td>
<td></td>
</tr>
</tbody>
</table>

* Indicates customer and addressee fields that are either blank or contain zero when a bill is for an agency subscription.

**MMERG3 format**

If you select the “MMERG3” mail-merge format code in your billing package definitions, each record in your mail-merge file will include all of the “MMERG1” and “MMERG2” fields plus the following ones:

<table>
<thead>
<tr>
<th>COMPANY</th>
<th>Addressee company</th>
</tr>
</thead>
<tbody>
<tr>
<td>This field contains the company for the customer to whom the bill is being sent.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>DEPT</th>
<th>*Addressee department</th>
</tr>
</thead>
<tbody>
<tr>
<td>This field contains the department for the customer to whom the bill is being sent.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PREFIX</th>
<th>*Addressee prefix</th>
</tr>
</thead>
<tbody>
<tr>
<td>This field contains the prefix for the customer to whom the bill is being sent.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>FNAME</th>
<th>*Addressee first name</th>
</tr>
</thead>
<tbody>
<tr>
<td>This field contains the first name of the customer to whom the bill is being sent.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LNAME</th>
<th>*Addressee last name</th>
</tr>
</thead>
<tbody>
<tr>
<td>This field contains the last name of the customer to whom the bill is being sent.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SUFFIX</th>
<th>*Addressee suffix</th>
</tr>
</thead>
<tbody>
<tr>
<td>This field contains the suffix for the customer to whom the bill is being sent.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>TITLE</th>
<th>*Addressee title</th>
</tr>
</thead>
<tbody>
<tr>
<td>This field contains the title for the customer to whom the bill is being sent.</td>
<td></td>
</tr>
</tbody>
</table>
Appendix D

Mail-merge bills and order acknowledgements

STREET2

Address street2

This field contains the information entered on the second line of the address for the customer to whom the bill is being sent.

COUNTRY

Address country

This field contains the name of the country in which the customer to whom the bill is being sent lives.

ZIPLOCATE

*Address postal code position

This field contains ‘L’ or ‘R’ to indicate whether the postal code should go to the left or to the right of the city name for the country in which the customer to whom the bill is being sent lives. (Please note, this field will contain “R” for the United States of America and Canada. For agency subscriptions, this field will be blank.)

SEX

*Address sex

This field contains the entry in the ‘Sex’ field for the customer to whom the bill is being sent.

DEMOCODEA-D

*Address demographic codes

DEMODATA1-2

These fields contain the entries in the demographic code fields (A, B, C, D, 1, and 2) for the customer to whom the bill is being sent.

USERID

*Address user ID

This field contains the entry in the user ID field for the customer to whom the bill is being sent.

PASSWORD

*Address password

This field contains the entry in the password field for the customer to whom the bill is being sent.

*Indicates customer and address fields that are either blank or contain zero when a bill is for an agency subscription.

MMERG4 format

The “MMERG4” format arranges the billing information into a series of 9 lines, with a type field, a description field and an amount field for each line. Unlike the MMERG1-3 formats there is no specifically identified field for the price, the tax,
Appendix D

Mail-merge bills and order acknowledgements

and the shipping. Instead there is simply an array of descriptions and amounts, which if arranged in columnar fashion will present all of the details. You do not need to worry about shifting fields up to avoid blank lines when the tax or shipping is not present.

The contents of each line is not fully predictable—it will depend on whether tax or shipping is included, on whether the order is partially paid, and on whether the subscription is for a single copy or multiple copies. Because of all of these variations you must include all 9 of the offer lines in your custom form or risk cutting off information and making the bill incomprehensible.

Each line of the price block contains a type code that indicates what is on that particular line. This may be useful if you need to programmatically pick out the lines containing the price, tax or shipping amounts from the other lines.

We supply a sample Microsoft Word mail-merge template that uses the “MMERG4” format. It is named Bill.dot for bills and Ack.dot for acknowledgements; you will find them in your QuickFil program directory.

Note: the list below provides descriptions only for the fields that are not in the “MMERG1,” “MMERG2,” or “MMERG3” formats.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RECNUM</td>
<td>Record number</td>
</tr>
<tr>
<td>PUBCODE</td>
<td>Publication code</td>
</tr>
<tr>
<td>SERIES</td>
<td>Billing series code</td>
</tr>
<tr>
<td>PACKAGE</td>
<td>Billing package code</td>
</tr>
<tr>
<td>ADDRESS1-ADDRESS6</td>
<td>Customer address</td>
</tr>
<tr>
<td>PUBNAME1-PUBNAME2</td>
<td>Publication name</td>
</tr>
<tr>
<td>DATE</td>
<td>Date</td>
</tr>
<tr>
<td>ORDERNUM</td>
<td>Order number</td>
</tr>
<tr>
<td>EFFORT</td>
<td>Effort number</td>
</tr>
<tr>
<td>TYPE1-TYPE9</td>
<td>Type codes</td>
</tr>
</tbody>
</table>

In these fields are codes that indicate the contents of the corresponding description and amount fields. The codes are as follows: 1 = term description, 2 = shipping, 3 = tax, 4 = dotted line, 5 = subtotal, 6 = credit, and 7 = amount due.
Appendix D

Mail-merge bills and order acknowledgements

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DESCRI1-</td>
<td>Descriptions</td>
</tr>
<tr>
<td>DESCR9</td>
<td>In these fields are the descriptive text for the corresponding type code field.</td>
</tr>
<tr>
<td>AMOUNT1-</td>
<td>Amounts</td>
</tr>
<tr>
<td>AMOUNT9</td>
<td>In these fields are the dollar amount for the corresponding description field.</td>
</tr>
<tr>
<td>AMOUNTDUE</td>
<td>Amount due</td>
</tr>
<tr>
<td>TERM</td>
<td>Term</td>
</tr>
<tr>
<td>QUANTITY</td>
<td>Quantity</td>
</tr>
<tr>
<td>SHIPMETHOD</td>
<td>Shipping method</td>
</tr>
<tr>
<td>SUBTYPE</td>
<td>Subscription type</td>
</tr>
<tr>
<td>PAYAMOUNT</td>
<td>Payment amount</td>
</tr>
<tr>
<td>PAYDATE</td>
<td>Payment date</td>
</tr>
</tbody>
</table>

In most cases, the entry in this field comes from the shipping code descriptions on the ‘Shipping’ tab of the ‘Publications’ definition screen.

The exceptions:

1. The order you’re billing is a group order and you’ve used more than one shipping code with a nonzero shipping charge. In this case, this field will contain the entry “Shipping.” (That’s because there’s no room to specify more than one type of shipping—for example, “airmail” and “first-class.”)

2. The order you’re billing uses a shipping code for which you’ve provided no description. Again, in this case, this field will contain the entry “Shipping.”

This field contains ‘S’ for single subscriptions, ‘2’ for two-party subscriptions, and ‘G’ for group subscriptions.

This field contains the amount paid, if any, for this order.

This field contains the date of the most recent payment for this order.
## Mail-merge bills and order acknowledgements

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PAYDESC</td>
<td>Payment description</td>
</tr>
<tr>
<td></td>
<td>This field contains the type of payment (e.g., cash or check, Visa, etc.) for this order.</td>
</tr>
<tr>
<td>CCNUM</td>
<td>Credit card number</td>
</tr>
<tr>
<td></td>
<td>If the order was paid by credit card, this field contains the credit card number used.</td>
</tr>
<tr>
<td>CCLAST4</td>
<td>Last four digits of credit card number</td>
</tr>
<tr>
<td></td>
<td>If the order was paid by credit card, this field contains the last four digits of the credit card number used.</td>
</tr>
<tr>
<td>CCEXP</td>
<td>Credit card expiration date</td>
</tr>
<tr>
<td></td>
<td>If the order was paid by credit card, this field contains the expiration date for the credit card number used.</td>
</tr>
<tr>
<td>DOCDESC1</td>
<td>Document descriptors</td>
</tr>
<tr>
<td>DOCDESC2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The entries in these two fields depend on what you entered on the first line of the 'Document descriptors' field on the 'Format' tab of the 'Billing series' definition screen.</td>
</tr>
<tr>
<td>MESSAGE1A</td>
<td>Message block one</td>
</tr>
<tr>
<td>MESSAGE1D</td>
<td></td>
</tr>
<tr>
<td>MESSAGE2A</td>
<td>Message block two</td>
</tr>
<tr>
<td>MESSAGE2D</td>
<td></td>
</tr>
<tr>
<td>EXPDATE</td>
<td>Expiration date</td>
</tr>
<tr>
<td>SHIPADDR1</td>
<td>Customer address</td>
</tr>
<tr>
<td>SHIPADDR6</td>
<td></td>
</tr>
<tr>
<td>COMADDR1</td>
<td>Company address</td>
</tr>
<tr>
<td>COMADDR5</td>
<td></td>
</tr>
<tr>
<td>COMPHONE</td>
<td>Company phone</td>
</tr>
<tr>
<td>PUBPAYABLE</td>
<td>Publication payable</td>
</tr>
<tr>
<td>CCARDS</td>
<td>Credit card info</td>
</tr>
</tbody>
</table>

Whether you get an entry in this field depends on whether you selected the 'Print credit card info block on bill' field on the “Billing packages” definition.
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Mail-merge bills and order acknowledgements

screen. If you left the credit card block field blank, this field will be blank. If you selected ‘Print credit card block on bill field’, you'll see abbreviations for the credit cards you accept in this field. For example, if you accept Mastercard and Visa, this field will contain "MC/VISA Number." (QuickFill determines which credit cards to display based on which merchant ID numbers you filled in on the “Companies” definition screen.)

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FEDTAXID</td>
<td>Company federal tax ID number</td>
</tr>
<tr>
<td>PONUM</td>
<td>Purchase order number</td>
</tr>
<tr>
<td>ADDRESSEE</td>
<td>Addressee</td>
</tr>
<tr>
<td>BILLTONUM</td>
<td>Bill-to customer</td>
</tr>
<tr>
<td>SHIPTONUM</td>
<td>Ship-to customer</td>
</tr>
<tr>
<td>AGENCY</td>
<td>*Agency</td>
</tr>
<tr>
<td>SALUTATN</td>
<td>*Customer salutation</td>
</tr>
<tr>
<td>PREFIX</td>
<td>*Addressee prefix</td>
</tr>
<tr>
<td>FNAME</td>
<td>*Addressee first name</td>
</tr>
<tr>
<td>LNAME</td>
<td>*Addressee last name</td>
</tr>
<tr>
<td>SUFFIX</td>
<td>*Addressee suffix</td>
</tr>
<tr>
<td>TITLE</td>
<td>*Addressee title</td>
</tr>
<tr>
<td>COMPANY</td>
<td>Addressee company</td>
</tr>
<tr>
<td>DEPT</td>
<td>*Addressee department</td>
</tr>
<tr>
<td>STREET1</td>
<td>Addressee street1</td>
</tr>
<tr>
<td>STREET2</td>
<td>Addressee street2</td>
</tr>
</tbody>
</table>

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Mail-merge bills and order acknowledgements

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CITY</td>
<td>Addressee city</td>
</tr>
<tr>
<td>STATE</td>
<td>Addressee state</td>
</tr>
<tr>
<td>ZIP</td>
<td>Addressee zip or postal code</td>
</tr>
<tr>
<td>ZIP2</td>
<td>Addressee zip+2</td>
</tr>
<tr>
<td>CNTRYCODE</td>
<td>*Addressee country code</td>
</tr>
<tr>
<td>COUNTRY</td>
<td>Addressee country</td>
</tr>
<tr>
<td>CARRT</td>
<td>*Addressee carrier route</td>
</tr>
<tr>
<td>CASSDATE</td>
<td>*Addressee CASS certification date</td>
</tr>
<tr>
<td>ZIPLOCATE</td>
<td>*Addressee postal code position</td>
</tr>
<tr>
<td>SEX</td>
<td>*Addressee sex</td>
</tr>
<tr>
<td>DEMOCODEA-D,</td>
<td>*Addressee demographic codes</td>
</tr>
<tr>
<td>DEMODATA1-2</td>
<td></td>
</tr>
<tr>
<td>PHONE</td>
<td>Customer telephone number</td>
</tr>
<tr>
<td>FAX</td>
<td>*Addressee fax number</td>
</tr>
<tr>
<td>EMAIL</td>
<td>*Addressee e-mail address</td>
</tr>
<tr>
<td>USERID</td>
<td>*Addressee user ID</td>
</tr>
<tr>
<td>PASSWORD</td>
<td>*Addressee password</td>
</tr>
</tbody>
</table>

*Indicates customer and addressee fields that are either blank or contain zero when a bill is for an agency subscription.
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Mail-merge renewal notices and blanket renewal notices

Renewal notices and blanket renewal notices

File contents by field

There are four possible mail-merge output formats for renewal notices, named MMERG1, 2, 3 and 4. MMERG4 is the most recently designed format and we recommend that new QuickFill users choose this format. The MMERG1, 2 and 3 formats are increasingly expansive: the MMERG2 format contains everything that the MMERG1 format has plus additional fields that make it possible to do a postal presort on the file. The MMERG3 format contains everything that the MMERG1 and MMERG2 formats have plus it has all of the address fields split out into their individual components.

MMERG1 format

RECNUM Record number
This field contains a sequential record number.

COMADDR1-5 Company address
The entries in these fields depend on whether you selected the ‘Print company name on renewals’ field in the ‘Companies’ definition screen. If you left the ‘Print company name on renewals’ field blank, these first five fields will be blank. If you checked this field, the five fields will contain the data you entered in the company ‘Name’ field; the two-line ‘Address’ field; and the city, state, zip, and country fields.

COMPHONE Company phone
This field always contains the phone number you entered in the ‘Phone’ field on the ‘Companies’ definition screen.
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Whether you get entries in the next three fields depends on whether you selected the ‘Print credit card info block on notice’ field on the ‘Renewal packages’ definition screen. If you left the credit card block field blank, these three fields will be blank. If you selected this field by clicking on it once so that the circle next to it was filled in, you’ll see the following in these three fields:

CCBLOCK1 “__________________ ___/___”
CCBLOCK2 “AMEX/MC/VISA/DISC Exp Date”
CCBLOCK3 “Signature ____________________”

The CCBLOCK2 may not contain exactly the same card names shown above. The ones that are displayed depend on which merchant ID numbers you filled in on the ‘Companies’ definition screen.

ADDRESS1 - Customer address
ADDRESS6

What you see in these fields depends on the specific order you’re renewing, of course. But it also depends on your entries in the following fields:

1. The ‘Send to ship-to’ field on the ‘Renewal series’ definition screen.
2. The ‘Send notice to’ field in the “Agency subscriptions” section on the same screen.

These six fields match the mailing label image you see when you use ‘Lookup’ to get details on a customer.

If you leave the ‘Send to ship-to’ field blank, QuickFill produces the address of the “bill-to” customer for the order you’re renewing. If you select the ‘Send to ship-to’ field by clicking on it once so that a check mark appears in it, QuickFill produces the address of one of the “ship-to” customers. If you elected to send renewal notices for agency subscriptions to the agency, then QuickFill inserts the agency address you filled in on the ‘Agencies’ definition screen.

PUBCODE Publication code

This field contains the code you entered on the publication definition general tab.

PUBNAME1 - Publication name
PUBNAME2

The entries in these fields come from the name you entered in the ‘Publication name’ field on the publication definition general tab. The lines break just the way you entered them. If you do not want the publication name in these fields, clear the ‘Print publication name...’ fields on the “Defining renewal series” screen.
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<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DATE</td>
<td>Date</td>
</tr>
<tr>
<td>ORDERNUM</td>
<td>Order number</td>
</tr>
<tr>
<td>EFFORT</td>
<td>Effort number</td>
</tr>
<tr>
<td>TERMDESC</td>
<td>Detail term description</td>
</tr>
<tr>
<td>OFFER2</td>
<td>Offer 2</td>
</tr>
<tr>
<td>OFFERTXT5</td>
<td>Offer text 5</td>
</tr>
<tr>
<td>PRICE1</td>
<td>Price 1</td>
</tr>
<tr>
<td>PRICE20</td>
<td>Price 20</td>
</tr>
<tr>
<td>BLANK1</td>
<td>Blank 1</td>
</tr>
<tr>
<td>BLANK3</td>
<td>Blank 3</td>
</tr>
</tbody>
</table>

This field contains the date in the ‘Date the renewal notices...’ field on the update screen at the time you ran the update. The date’s format matches your entry in the ‘Date format’ field on the ‘Preferences’ screen.

This field contains the order number of the order you’re renewing.

In this field is the number—from 1 through 12—of your renewal effort. (The first renewal notice you send is effort number 1, the second effort number 2, and so forth.)

Each renewal effort can include up to five different offers. On QuickFill’s standard renewal notices, you can see full pricing details for one offer. For more information on how QuickFill selects this “detail” offer, refer to “Renewal, Definitions,” “Renewal efforts” in the index for QuickFill’s online help system.

The next few fields vary depending on whether your publication uses unit pricing or stepped pricing. For unit pricing you’ll see the components of the “detail” offer in the TERMDESC through MINTEXT fields. For the remaining offers (for which the order you’re renewing qualifies), QuickFill produces only summaries of the pricing in the OFFER2 through OFFERTXT5 fields.

For stepped pricing the TERMDESC through OFFERTXT5 fields are replaced with 20 fields named PRICE_1 through PRICE_20 and three blank fields (BLANK1-3). Each of the PRICE_nn fields corresponds to one line of the pricing area of the renewal notice. The contents of these fields are not predictable. Because of the many possible variations in price/quantity levels, it is not possible to determine exactly which field will contain the shipping and which will contain the tax. We strongly advise that you always include all of the PRICE1 through PRICE_20 fields in your custom templates.

This field comes from the entry you made in the ‘Term description for renewal notice’ field in the ‘Offers’ definition screen. If you left this field blank, the term of the order you’re renewing appears as the number of issues followed by the number of copies—for example, “12 issues, 2 copies.” If either quantity is 1, then it is omitted. If both are 1, then only the words “1 copy” are printed.

The wording of the term is changed slightly if you indicated that the publication is something other than a periodical on the publication definition general tab.
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For services and memberships, the number of issues is never printed. For conferences the word “issues” is replaced with “sessions” and the word “copies” is replaced with “persons.” For memberships the word “copies” is replaced with “members.” For online services the word “copies” is replaced with “users.”

Examples:

- Two years
  - 12 issues 5 copies
  - Three years 10 copies
  - 2 registrants

PRICE Detail price

This field contains the price QuickFill calculates by using the price and term of the detail offer and the quantity of the order you’re renewing. The entry in this field is formatted as a dollar amount with a leading dollar sign ($). The decimal point is in the eighth position.

SHIPDESC Detail shipping description

In most cases, the entry in this field comes from the shipping code descriptions on the ‘Shipping’ tab of the ‘Publications’ screen.

The exceptions are:

1. The order you’re renewing is a group order and you’ve used more than one shipping code with a nonzero shipping charge. In this case, this field will contain the entry “Shipping.” (That’s because there’s no room to specify more than one type of shipping—for example, “airmail” and “first-class.”)

2. The order you’re renewing uses a shipping code for which you’ve provided no description. Again, in this case, this field will contain the entry “Shipping.”

3. Shipping charges do not apply to the order you’re renewing. In this case, this field will be blank.

SHIPCHARGE Detail shipping amount

This field contains the shipping charges, if any, for the order you’re renewing. QuickFill calculates these charges by using the term of the detail offer and the quantities and shipping codes for each ship-to. The charges are formatted as a dollar amount. If there are no shipping charges this field will be blank.

TAXDESC Tax text

If you’re charging sales tax for the order you’re renewing, this field contains “Tax.” If not, the field is blank.
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TAX  Detail tax amount
If you’re charging sales tax for the order you’re renewing, QuickFill calculates the tax by using the term and price of the detail offer and the total number of copies for the order. It also looks at the tax jurisdictions for each ship-to. If there is sales tax, this field contains the tax, formatted as a dollar amount. If there’s no sales tax, this field is blank.

CREDITTEXT  Credit text
If there’s an overpayment for the order you’re renewing, this field contains “Credit.” If not, the field is blank.

CREDIT  Credit amount
If there’s an overpayment on the order you’re renewing, this field contains the credit, formatted as a dollar amount. If not, this field is blank.

TOTALTEXT  Total text
If the detail offer has a minimum quantity of 1, this field contains the word “Total.” If not, the field contains the phrase “Total for X copies,” where “X” equals the minimum quantity.

TOTAL  Detail total amount
This field contains the price of the detail offer, plus the shipping amount of the detail offer, plus sales tax for the detail offer, minus any credit amount. This field is formatted as a dollar amount with a leading dollar sign ($).

MINTEXT  Minimum copy text
If the detail offer has a minimum quantity of 1, this field is blank. Otherwise, this field contains the phrase “X copy minimum for this price rate,” where “X” is the minimum quantity.

OFFER2  Offer 2 – Term description
This field contains the term description for your second offer. If you left the ‘Term description for renewal notice’ field blank for this offer, you’ll see a term description of “X,” where X is the term of the second offer. If you made an entry in this description field, that term appears in this field.

PRICE2  Offer 2 – Price
This field contains the per-copy price, calculated by using the second offer.

For single and two-party subscriptions, the per-copy price includes sales tax and shipping charges. QuickFill doesn’t include any credit amounts in this price.
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Mail-merge renewal notices and blanket renewal notices

For group subscriptions, the per-copy price does not include sales tax or shipping charges.

The entry in this field is formatted as a dollar amount with a leading dollar sign ($). The decimal point is in the eighth position.

**OFFERTXT2** Offer 2 – Offer message

If the minimum quantity for the second offer is 1, this field is blank. Otherwise you’ll see this entry in the field: “per copy. Minimum X.” where “X” is the minimum quantity you entered on the ‘Offers’ definition screen.

**OFFER3** Offer 3 – Term description

**PRICE3** Offer 3 – Price

**OFFERTXT3** Offer 3 – Offer message

**OFFER4** Offer 4 – Term description

**PRICE4** Offer 4 – Price

**OFFERTXT4** Offer 4 – Offer message

**OFFER5** Offer 5 – Term description

**PRICE5** Offer 5 – Price

**OFFERTXT5** Offer 5 – Offer message

**MESSAG1A** Message block one

**MESSAGE1D**

The entries in these four fields depend on what you entered in the ‘1st message’ field on the ‘Renewal series’ definition screen. Each field can be 40 characters long. (And each line can be used as a separate message.)

**MESSAGE2A** Message block two

**MESSAGE2D**

The entries in these four fields depend on what you entered in the ‘2nd message’ field on the ‘Renewal series’ definition screen. Each field can be 40 characters long. (And each line can be used as a separate message.)

**EXPDATE** Expiration date

This field contains the “expire issue” date of the order you’re renewing.
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### Mail-merge renewal notices and blanket renewal notices

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>QUANTITY</td>
<td>Quantity</td>
</tr>
<tr>
<td>Ship-to address</td>
<td>For group subscriptions, these fields contain the names of the ship-tos. If there are more than six names, then SHIPADDR1 through SHIPADDR5 contain the names of the first five ship-tos and SHIPADDR6 contains the words “and others.” For all other subscriptions these six fields contain the address of the ship-to customer.</td>
</tr>
<tr>
<td>Payable to text</td>
<td>If you entered a name in the ‘Checks payable to’ field on the publication definition general tab, this field contains “Check payable to.” If not, this field is blank.</td>
</tr>
<tr>
<td>Publication payable</td>
<td>This field contains the entry you made—if any—in the ‘Checks payable to:’ field on the publication definition general tab.</td>
</tr>
<tr>
<td>Federal tax ID text</td>
<td>If you made an entry in the ‘Federal tax ID number’ field on the ‘Companies’ definition screen, this field contains “Fed tax id #:”; if not, this field is blank.</td>
</tr>
<tr>
<td>Company federal tax ID number</td>
<td>This field contains the entry you made—if any—in the ‘Federal tax ID number’ field on the ‘Companies’ definition screen.</td>
</tr>
<tr>
<td>Customer telephone number</td>
<td>This field contains whatever phone number you entered for the customer to whom you’re mailing this renewal notice. This field is useful if you use telephone sales for one of your renewal efforts. You can create a custom mail-merge document with the telephone number. Then you can give this document to your telephone salespeople as a lead.</td>
</tr>
<tr>
<td>*Customer salutation</td>
<td>If you entered a salutation in the ‘Salutation’ field of the customer’s record, you’ll see that salutation in this field.</td>
</tr>
</tbody>
</table>
If you left the salutation field blank and entered a last name for the customer, QuickFill enters in this field the prefix you entered in the ‘Prefix’ field of the customer’s record, plus a space and the last name—for example, “Mr. Smith”.

If you left the salutation and prefix fields blank, QuickFill enters the customer’s full name in this field.

If you left the salutation, prefix, and last name fields blank, QuickFill enters “Subscriber” in this field.

*Indicates customer and addressee fields that are either blank or contain zero when a renewal notice is for an agency subscription.

**MMERG2 format**

If you select the “MMERG2” mail-merge format code in your renewal package definitions, each record in your mail-merge file will include all of the “MMERG1” fields plus the following ones:

**STREET1**  
Addressee street1

This field contains the information entered on the first line of the address for the customer to whom the renewal notice is being sent.

**CITY**  
Addressee city

This field contains the city in which the customer to whom the renewal notice is being sent lives.

**STATE**  
Addressee state

This field contains the state in which the customer to whom the renewal notice is being sent lives.

**ZIP**  
Addressee zip or postal code

This field contains the zip or postal code for the customer to whom the renewal notice is being sent.

**ZIP2**  
Addressee zip+2

This field contains the delivery point code for the customer to whom the renewal notice is being sent.
Mail-merge renewal notices and blanket renewal notices

**CARRT**  *Addressee carrier route*
This field contains the carrier route for the customer to whom the renewal notice is being sent.

**CNTRYCODE**  *Addressee country code*
This field contains the country code for the country in which the customer to whom the renewal notice is being sent lives.

**CASSDATE**  *Addressee CASS certification date*
This field contains the CASS certification date—if there is one—for the address of the customer to whom you’re sending the renewal notice. If the customer’s CASS certification date is not in QuickFill, this field is blank.

**FAX**  *Addressee fax number*
This field contains whatever fax number you entered for the customer to whom you’re sending the renewal notice. This field is useful if you fax renewal notices for one of your renewal efforts.

**EMAIL**  *Addressee E-mail address*
This field contains whatever e-mail address you entered for the customer to whom you’re sending the renewal notice. This field is useful if you use e-mail to send renewal notices for one of your renewal efforts.

**CUSAGENCY**  *Addressee customer number*
This field contains the customer number of the customer to whom the renewal notice is being sent. If a renewal notice is for an agency subscription and the renewal series definition is set up to send notices to the agency, this field contains the agency code instead of a customer number.

**PONUM**  *Purchase order number*
This field contains the purchase order number—if there is one—for the order you’re trying to renew. If there’s no number, this field is blank.

**SERIES**  *Renewal series code*
This field contains the renewal series code for the renewal series to which the order belongs.

**PACKAGE**  *Renewal package code*
This field contains the renewal package code associated with the renewal series and effort number of the renewal being sent to the customer.
Appendix D

Mail-merge renewal notices and blanket renewal notices

*Indicates customer and addressee fields that are either blank or contain zero when a renewal notice is for an agency subscription.

**MMERG3 format**

If you select the “MMERG3” mail-merge format code in your renewal package definitions, each record in your mail-merge file will include all of the “MMERG1” and “MMERG2” fields plus the following ones:

**COMPANY**  Addressee company

This field contains the company for the customer to whom the renewal notice is being sent.

**DEPT**  *Addressee department

This field contains the department for the customer to whom the renewal notice is being sent.

**PREFIX**  *Addressee prefix

This field contains the prefix for the customer to whom the renewal notice is being sent.

**FNAME**  *Addressee first name

This field contains the first name of the customer to whom the renewal notice is being sent.

**LNAME**  *Addressee last name

This field contains the last name of the customer to whom the renewal notice is being sent.

**SUFFIX**  *Addressee suffix

This field contains the suffix for the customer to whom the renewal notice is being sent.

**TITLE**  *Addressee title

This field contains the title for the customer to whom the renewal notice is being sent.

**STREET2**  Addressee street2

This field contains the information entered on the second line of the address for the customer to whom the renewal notice is being sent.
## Appendix D

### Mail-merge renewal notices and blanket renewal notices

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COUNTRY</td>
<td>Addressee country</td>
</tr>
<tr>
<td></td>
<td>This field contains the name of the country in which the customer to whom the renewal notice is being sent lives.</td>
</tr>
<tr>
<td>ZIPLOCATE</td>
<td>*Addressee postal code position</td>
</tr>
<tr>
<td></td>
<td>This field contains ‘L’ or ‘R’ to indicate whether the postal code should go to the left or to the right of the city name for the country in which the customer to whom the renewal notice is being sent lives. (Please note, this field will contain “R” for the United States of America and Canada. For agency subscriptions, this field will be blank.)</td>
</tr>
<tr>
<td>SEX</td>
<td>*Addressee sex</td>
</tr>
<tr>
<td></td>
<td>This field contains the entry in the ‘Sex’ field for the customer to whom the renewal notice is being sent.</td>
</tr>
<tr>
<td>DEMOCODEA-D</td>
<td>*Addressee demographic codes</td>
</tr>
<tr>
<td>DEMODATA1-2</td>
<td>These fields contain the entries in the demographic code fields (A, B, C, D, 1, and 2) for the customer to whom the renewal notice is being sent.</td>
</tr>
<tr>
<td>USERID</td>
<td>*Addressee user ID</td>
</tr>
<tr>
<td></td>
<td>This field contains the entry in the user ID field for the customer to whom the renewal notice is being sent.</td>
</tr>
<tr>
<td>PASSWORD</td>
<td>*Addressee password</td>
</tr>
<tr>
<td></td>
<td>This field contains the entry in the password field for the customer to whom the renewal notice is being sent.</td>
</tr>
<tr>
<td></td>
<td>*Indicates customer and addressee fields that are either blank or contain zero when a renewal notice is for an agency subscription.</td>
</tr>
</tbody>
</table>

### MMERG4 format

The MMERG4 format arranges the offer information into a series of 19 lines, with a type field, a description field and an amount field for each line. Unlike the MMERG1-3 formats there is no specifically identified field for the price, the tax, and the shipping. Instead there is simply an array of descriptions and amounts, which if arranged in columnar fashion will present all of the offer details. You do not need to worry about shifting fields up to avoid blank lines when the tax or shipping is not present.
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The contents of each line is not fully predictable—it will depend on how many offers are linked to the renewal effort, on whether tax or shipping is included, on whether the subscription is for a single copy or multiple copies and on whether the publication uses unit pricing or stepped pricing. Because of all of these variations you must include all 19 offer lines in your custom form or risk cutting off information and making the renewal notice incomprehensible.

Each line of the offer block contains a type code that indicates what is on that particular line. This may be useful if you need to programmatically pick out the lines containing the price, tax or shipping amounts from the other lines.

We supply a sample Microsoft Word mail-merge template that uses the MMERG4 format. It is named Renewal.dot and you will find it in your QuickFill program directory.

Note: the list below provides descriptions only for the fields that are not in the “MMERG1,” “MMERG2,” or “MMERG3” formats.

<table>
<thead>
<tr>
<th>FIELD</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PUBCODE</td>
<td>Publication code</td>
</tr>
<tr>
<td>SERIES</td>
<td>Renewal series code</td>
</tr>
<tr>
<td>PACKAGE</td>
<td>Renewal package code</td>
</tr>
<tr>
<td>ADDRESS1-ADDRESS6</td>
<td>Customer address</td>
</tr>
<tr>
<td>PUBNAME1-PUBNAME2</td>
<td>Publication name</td>
</tr>
<tr>
<td>DATE</td>
<td>Date</td>
</tr>
<tr>
<td>ORDERNUM</td>
<td>Order number</td>
</tr>
<tr>
<td>EFFORT</td>
<td>Effort number</td>
</tr>
<tr>
<td>TYPE1-TYPE19</td>
<td>Type codes</td>
</tr>
</tbody>
</table>

In these fields are codes that indicate the contents of the corresponding description and amount fields. The codes are as follows: 1 = term description, 2 = shipping, 3 = tax, 4 = credit, 5 = dotted line, 6 = amount due, 7 = other.

DESCRIPTIONS

These fields contain the descriptive text for the corresponding type code field.
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Mail-merge renewal notices and blanket renewal notices

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>AMOUNT1-</td>
<td>Amounts</td>
</tr>
<tr>
<td>AMOUNT19</td>
<td>These fields contain the amounts for each line of the offer area of the renewal notice.</td>
</tr>
<tr>
<td>AMOUNTDUE</td>
<td>Amount due</td>
</tr>
<tr>
<td>TERM</td>
<td>Term</td>
</tr>
<tr>
<td>QUANTITY</td>
<td>Quantity</td>
</tr>
<tr>
<td>SHIPMETHOD</td>
<td>Shipping method</td>
</tr>
<tr>
<td>SUBTYPE</td>
<td>Subscription type</td>
</tr>
</tbody>
</table>

AMOUNTDUE

This field contains the price of the detail offer, plus the shipping amount of the detail offer, plus sales tax for the detail offer, minus any credit amount. This field is formatted as a dollar amount with a leading dollar sign ($). The decimal point is in the eighth position.

TERM

This field contains the number of issues for this order.

QUANTITY

This field contains the number of copies this order receives.

SHIPMETHOD

In most cases, the entry in this field comes from the ‘Shipping’ tab on the ‘Publications’ screen.

The exceptions are:

1. The order you’re renewing is a group order and you’ve used more than one shipping code with a non-zero shipping charge. In this case, this field will contain the entry “Shipping.” (That’s because there’s no room to specify more than one type of shipping—for example, “airmail” and “first-class.”)

2. The order you’re renewing uses a shipping code for which you’ve provided no description. Again, in this case, this field will contain the entry “Shipping.”

3. Shipping charges do not apply to the order you’re renewing. In this case, this field will be blank.

SUBTYPE

This field contains ‘S’ for single subscriptions, ‘2’ for two-party subscriptions, and ‘G’ for group subscriptions.
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<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOCDESC1-</td>
<td>Document descriptors</td>
</tr>
<tr>
<td>DOCDESC2</td>
<td></td>
</tr>
<tr>
<td>MESSAGE1A-</td>
<td>Message block one</td>
</tr>
<tr>
<td>MESSAGE1D</td>
<td></td>
</tr>
<tr>
<td>MESSAGE2A-</td>
<td>Message block two</td>
</tr>
<tr>
<td>MESSAGE2D</td>
<td></td>
</tr>
<tr>
<td>EXPDATE</td>
<td>Expiration date</td>
</tr>
<tr>
<td>SHIPADDR1-</td>
<td>Customer address</td>
</tr>
<tr>
<td>SHIPADDR6</td>
<td></td>
</tr>
<tr>
<td>COMADDR1-</td>
<td>Company address</td>
</tr>
<tr>
<td>COMADDR5</td>
<td></td>
</tr>
<tr>
<td>COMPHONE</td>
<td>Company phone</td>
</tr>
<tr>
<td>PUBPAYABLE</td>
<td>Publication payable</td>
</tr>
<tr>
<td>CCARDS</td>
<td>Credit card info</td>
</tr>
<tr>
<td>FEDTAXID</td>
<td>Company federal tax ID number</td>
</tr>
<tr>
<td>PONUM</td>
<td>Purchase order number</td>
</tr>
<tr>
<td>ADDRESSSEE</td>
<td>Addressee</td>
</tr>
<tr>
<td>BILLTONUM</td>
<td>Bill-to customer</td>
</tr>
</tbody>
</table>

The entries in these two fields depend on what you entered on the first line of the ‘Document descriptors’ field on the ‘Format’ tab of the ‘Renewal series’ definition screen.

Whether you get an entry in this field depends on whether you selected the ‘Print credit card info block on notice’ field on the ‘Renewal packages’ definition screen. If you left the credit card block field blank, this field will be blank. If you selected the ‘Print credit card block on notice’ field, you’ll see abbreviations for the credit cards you accept in this field. For example, if you accept Mastercard and Visa, this field will contain “MC/VISA Number.” (QuickFill determines which credit cards to display based on which merchant ID numbers you filled in on the ‘Companies’ definition screen.)

This field contains the customer number for the person to whom the renewal notice is addressed.

This field contains the customer number of the bill-to customer for the order.
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Mail-merge renewal notices and blanket renewal notices

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SHIPTONUM</td>
<td>Ship-to customer</td>
</tr>
<tr>
<td>AGENCY</td>
<td>*Agency</td>
</tr>
<tr>
<td>SALUTATN</td>
<td>*Customer salutation</td>
</tr>
<tr>
<td>PREFIX</td>
<td>*Addressee prefix</td>
</tr>
<tr>
<td>FNAME</td>
<td>*Addressee first name</td>
</tr>
<tr>
<td>LNAME</td>
<td>*Addressee last name</td>
</tr>
<tr>
<td>SUFFIX</td>
<td>*Addressee suffix</td>
</tr>
<tr>
<td>TITLE</td>
<td>*Addressee title</td>
</tr>
<tr>
<td>COMPANY</td>
<td>Addressee company</td>
</tr>
<tr>
<td>DEPT</td>
<td>*Addressee department</td>
</tr>
<tr>
<td>STREET1</td>
<td>Addressee street1</td>
</tr>
<tr>
<td>STREET2</td>
<td>Addressee street2</td>
</tr>
<tr>
<td>CITY</td>
<td>Addressee city</td>
</tr>
<tr>
<td>STATE</td>
<td>Addressee state</td>
</tr>
<tr>
<td>ZIP</td>
<td>Addressee zip or postal code</td>
</tr>
<tr>
<td>ZIP2</td>
<td>Addressee zip+2</td>
</tr>
<tr>
<td>CNTRYCODE</td>
<td>*Addressee country code</td>
</tr>
<tr>
<td>COUNTRY</td>
<td>Addressee country</td>
</tr>
<tr>
<td>CARRT</td>
<td>*Addressee carrier route</td>
</tr>
<tr>
<td>CASSDATE</td>
<td>*Addressee CASS certification date</td>
</tr>
<tr>
<td>ZIPLOCATE</td>
<td>*Addressee postal code position</td>
</tr>
<tr>
<td>SEX</td>
<td>*Addressee sex</td>
</tr>
</tbody>
</table>

QuickFill
Mail-merge renewal notices and blanket renewal notices

DEMOCODEA-D,  *Addressee demographic codes
DEMODATA1-2

PHONE  Customer telephone number
This field contains whatever phone number you entered for the customer to whom you’re mailing this renewal notice. This field is useful if you use telephone sales for one of your renewal efforts. You can create a custom mail-merge document with the telephone number. Then you can give this document to your telephone salespeople as a lead.

FAX  *Addressee fax number

EMAIL  *Addressee e-mail address

USERID  *Addressee user ID

PASSWORD  *Addressee password

*Indicates customer and addressee fields that are either blank or contain zero when a renewal notice is for an agency subscription.
Appendix E

Postal Presort & QuickFill Label Splitter

- Overview
- Automatic postal presort files
- QuickFill Label Splitter
Appendix E
Postal presort & QuickFill Label Splitter

Overview
Each time the ‘Issue labels’ update is run, QuickFill produces label files from which Cheshire or pressure-sensitive labels may be printed. However, QuickFill can also be used to create issue label files that are compatible with postal presort packages (e.g., AccuMail, Prosort, ArcList). Postal presort label files can be produced in the following ways:

Automatic Postal Presort Files
Use this method to automatically produce postal presort files each time the ‘Issue labels’ update is run. (Refer to “Postal presort” in the built-in help system’s index for a description of the postal presort format.)

QuickFill Label Splitter
Use this method to produce postal presort files from any QuickFill label file (issue labels, one-shot labels, promotional labels, group subscription labels, subscription agency labels, renewal labels, and additions and removals labels—audit system only). You may also use this method to view your labels in QuickFill before importing them into a postal presort package.

Both of these methods will create files formatted for use with postal presort packages. QuickFill assigns names to these label files in the format QFLABnnn.DBF, where nnn is a number. QuickFill saves the postal presort files it produces in the mail-merge directory. The “About QuickFill” screen shows the exact location of this directory.

Automatic postal presort files
QuickFill determines whether or not to produce postal presort files based on the numbers in the ‘Minimum group size for presort’ field on the ‘Shipping’ tab of the Publication definition screen.

If you do not use postal presort or do not wish to automatically create postal presort files each time the ‘Issue labels’ update is run, enter all 9s in the ‘Minimum group size for presort’ field.

If you use postal presort on label groups larger than 50 labels, for example, enter the number 50 in this field, and QuickFill will produce postal presort files for any label groups that include more than 50 labels.

If you use postal presort on all label groups regardless of the number of labels, enter the number zero in this field, and QuickFill will produce postal presort files for your label groups.

Once your publication definition is set up to automatically create postal presort files and the ‘Issue labels’ update has been run, the update report (under ‘Print saved report’) will list the names of the postal presort files that were created.

The postal presort files will be stored in the mail-merge directory. The “About QuickFill” screen displays the exact location of this directory. At this point, these files have only been formatted for use with your postal presort package;
Appendix E

Postal presort & QuickFill Label Splitter

they have not been presorted. You can then import the files into your presort software, perform postal presort, and print the labels.

Label Splitter

Use the Label Splitter to change the format of any label files (issue labels, one-shot labels, promotional labels, group subscription labels, subscription agency labels, renewal labels and additions and removals labels—audit system only).

To use the Label Splitter, select 'Print' from either the 'File' or the 'Reports' menu, go to the 'Labels' tab of the 'Print Saved Reports' screen, select a label file, and click on the “Label Groups” button located to the right of the label file listing. Once QuickFill displays the label groups within the file (see the sample below), choose the format to be used for each label group in the 'Output Type' column. If you want to create separate files for some label groups, enter a file number (from 1 to 99) in the 'Group' column. When you are done, click on "OK" run the label splitter.

If you requested label files, the newly split label files will appear on the Labels tab of the 'Print Saved Reports' screen with file names similar to “Issue labels—Group 1”. If you requested dBase files, the files will appear on the Mail Merge tab with file names of the form QFLABnnn.DBF, where nnn is a number.

You do not have to use the same format for all of the label groups within a label file. For example, if you print all air mail labels in-house on pressure sensitive labels and send the rest of your labels to a mailing house, you would select

Analyzing label files

To use the Label Splitter, select ‘Print’ from either the ‘File’ or the ‘Reports’ menu, go to the ‘Labels’ tab of the ‘Print Saved Reports’ screen, select a label file, and click on the “Label Groups” button located to the right of the label file listing. Once QuickFill displays the label groups within the file (see the sample below), choose the format to be used for each label group in the ‘Output Type’ column. If you want to create separate files for some label groups, enter a file number (from 1 to 99) in the ‘Group’ column. When you are done, click on "OK" run the label splitter.

If you requested label files, the newly split label files will appear on the Labels tab of the ‘Print Saved Reports’ screen with file names similar to “Issue labels—Group 1”. If you requested dBase files, the files will appear on the Mail Merge tab with file names of the form QFLABnnn.DBF, where nnn is a number.

You do not have to use the same format for all of the label groups within a label file. For example, if you print all air mail labels in-house on pressure sensitive labels and send the rest of your labels to a mailing house, you would select

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Postal presort & QuickFill Label Splitter

‘Labels’ for label groups with a ship class of “A” and ‘dBase’ or ‘dBase Audit’ for the rest of your label groups.

Use this field to specify the type of file you would like QuickFill to create for a specific label group. For systems without the audit feature the choices are ‘Labels’ or ‘dBase’. In systems with the audit feature, there is a third format named ‘dBase Audit’. You should choose ‘Labels’ for the groups for which you want standard labels, printed directly from within QuickFill. You should choose ‘dBase’ for the groups where you want files that you can transmit to your mail shop or can feed into postal presort packages such as PostWare and ArcList. You should choose the ‘dBase Audit’ format if you need qualification data fields in the output file.

QuickFill suggests some choices for you for each of the groups based on the number of labels in the group. For issue and renewal label groups of less than 250 labels it assumes that you probably want printed labels since there is no cost benefit in performing a postal presort on small groups. For groups of 250 or more and for label types other than issue or renewal labels QuickFill assumes that you want dBase files. You can change the format of any group by clicking on the arrow buttons in the ‘Output type’ column.

Use the “Change All” button on the bottom left side of the label splitter screen to change the ‘Output Type’ for all of the label groups that are displayed. Each time you click the button, all of the label groups will be changed to the next
available output format. (For details on the each of these formats, refer to “Formats,” “issue labels” in the index for QuickFill’s online help system.)

| Group | Use this field to control the number of output files created for your labels. This field defaults to “1” for all label groups meaning that only one output file will be created. If you would like to create separate files for each label group, change the numbers in the ‘Group’ column (you may use the numbers 1 to 99). If you have multiple label groups that you would like to put in the same file, simply use the same number for each of those groups.

| Zone | Check this field for each label group for which you would like the ‘Label splitter’ report to include a periodical class zone, and county and intra-SCF reports. The label splitter produces the periodical class zone and county and intra-SCF reports based on the periodical class zone table and county and SCF table linked to a publication’s definition. (Refer to chapter 8, Definitions, p. 8.50, for information on linking these tables to a publication.)

| Pub | The publication code associated with the label group. This field is only displayed when analyzing additions and removals labels (audit system only), issue labels, renewal labels, and promotional labels.

| Bill/Ren Format | This field indicates whether or not bills and/or renewals were produced for a label group. It is only displayed when processing issue labels. The ‘Bill/Ren Format’ field may contain the following:

- **Bill/Renewal Format**
  - B-STD (Standard bills were produced for this group.)
  - R-STD (Standard renewals were produced for this group.)
  - B-MMERG1 (Mail-merge bills were produced for this group.)
  - R-MMERG1 (Mail-merge renewals were produced for this group.)
  - B-MMERG2 (Mail-merge bills were produced for this group.)
  - R-MMERG2 (Mail-merge renewals were produced for this group.)
  - B-MMERG3 (Mail-merge bills were produced for this group.)
  - R-MMERG3 (Mail-merge renewals were produced for this group.)
  - B-MMERG4 (Mail-merge bills were produced for this group.)
  - R-MMERG4 (Mail-merge renewals were produced for this group.)
  - R-LABEL (Renewal labels were produced for this group.)

If no bills or renewals were produced for your issue labels, this field will be blank.

| Form | The ‘Form’ field contains the Form set code (from the billing or renewal package) for the corresponding bills or renewals. This field is only displayed when analyzing issue labels and renewal labels. If the ‘Bill/Renewal Format’ field (when analyzing issue labels) is blank, the ‘Form’ field will also be blank.

| Package | The ‘Package’ field contains the Package code (from the billing or renewal package) for the corresponding bills or renewals. This field is only displayed when analyzing issue labels and renewal labels. If the ‘Bill/Renewal Format’ field (when analyzing issue labels) is blank, the ‘Package’ field will also be blank.
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Postal presort & QuickFill Label Splitter

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Issue</td>
<td>The issue number being served to the label group. This field is only displayed when analyzing issue labels.</td>
</tr>
<tr>
<td>Premium</td>
<td>The premium code if the label group has premiums to be served with the issue. This field is only displayed when analyzing issue labels.</td>
</tr>
<tr>
<td>Split</td>
<td>The split code associated with the label group. This field is only displayed when analyzing issue labels.</td>
</tr>
<tr>
<td>Svc</td>
<td>The service code associated with the label group. This field is only displayed when analyzing issue labels.</td>
</tr>
<tr>
<td>Ship</td>
<td>The shipping code associated with the label group. This field is only displayed when analyzing issue labels.</td>
</tr>
<tr>
<td>Copies</td>
<td>The number of copies associated with the label group. This field is only displayed when analyzing issue labels.</td>
</tr>
<tr>
<td>Labels</td>
<td>The number of labels in the label group.</td>
</tr>
</tbody>
</table>

**Label Splitter Report**

Whenever the label splitter is run, QuickFill produces a ‘Label splitter’ report. This report contains the information from the label splitter screen (output type, publication, bill/renewal format, etc.) as well as the filename (including path information) for each file created. If your publication definition is linked to a periodical class zone table and a county and SCF table, and the ‘Zone’ fields were checked, the report will also include periodical class and county and intra-SCF reports. The ‘Label splitter’ report may be viewed and/or printed from the ‘Reports’ tab of the ‘Print Saved Reports’ screen.
Appendix F

QuickFill & ODBC

- Overview
- ODBC tables
QuickFill includes an ODBC (Open Database Connectivity) driver which allows you to retrieve data from your database and create reports other than those provided by QuickFill itself. Common desktop applications such as Microsoft Access, Microsoft Excel and Crystal Reports all can be used to create reports using the ODBC driver. For a complete walkthrough on how to create such a report using Microsoft Excel ask for a copy of the QuickFill Application Note entitled *Sales Analysis Using QuickFill and PivotTables*.  

All of the above mentioned desktop applications provide a “drag and drop” style of constructing queries that does not require any knowledge of the SQL language. In the event that the application you are using requires you to enter SQL queries manually, you will need to know the details of the SQL syntax supported by the ODBC driver. You can find this in the documentation provided by ATI, the publisher of the tool kit used to build the ODBC driver, which can be found at:


Be aware that QuickFill’s ODBC driver is read-only and does not support any SQL commands other than the SELECT command.

If you have used ODBC before you are no doubt aware that you must create a “data source” using the ODBC control panel in Windows before you can access your data. Rest assured that this is not necessary with QuickFill. QuickFill automatically creates data sources for you whenever you open a database in QuickFill. The data sources are assigned names of the form “QuickFill XXXX Database” where the XXXX is the name of the QuickFill database.

*Note: Importing versus Linking in Microsoft Access*  

Microsoft Access allows you to specify whether you want to import external data or simply link to it. If you import the data you are creating a copy of the data that is frozen in time. Changes you make in your QuickFill database will not be reflected in the imported copy of the data. On the other hand, if you link to the data the ODBC driver will fetch a fresh copy of the data from the QuickFill database every time you run the query.
Once you have specified a QuickFill database as your data source, you’ll be given access to all of the QuickFill ODBC tables. You can then use your ODBC application to create queries, forms, reports, etc. that retrieve data from these tables.

Note: currency fields
QuickFill’s ODBC driver displays currency fields in pennies, not dollars. When using an ODBC application, you can change the display from pennies to dollars, by defining your query(s) to divide currency fields by 100. For example, using Microsoft Access you can design a query to display the earned income in dollars for each order, by using the expression “Amount:[ORD_EIC]/100.” You can do this by right clicking in an empty field and selecting “Build…” from the menu that appears. Using Microsoft Excel, change the column’s number format property to “Currency.”

In addition, currency fields use QuickFill’s internal accounting convention. That is, debit balances have positive values and credit balances have negative values. (Refer to chapter 11, Accounting, p. 11.4, for more information about accounting in QuickFill.)

Linking ODBC tables
You can link (or join) ODBC tables based on fields that they have in common. This allows you to retrieve subscriptions purchased by a particular customer, or orders for a particular subscription. In theory you can link any two fields that have common data in them but in practice you will find that the speediest joins are made using the fields with “DBA” in their name. The DBA fields are database address fields that uniquely identify every record in a QuickFill database. Every record has a database address contained in a field that matches the record name. For example, the subscription record (or SUB record) has a database address field that is named SUB_DBASUB. Most records also contain fields that link them to their associated records. For example, the subscription record contains a link to its associated customer record in the SUB_DBACUS field. When joining two tables it is best to use fields that have matching names after the underscore. The best joins for the most commonly used tables are these:

- PUB to SUB (publication to subscriptions) Join PUB_DBAPUB to SUB_DBAPUB
- SUB to ORD (subscription to orders) Join SUB_DBASUB to ORD_DBASUB
- SUB to SHP (subscription to ship-tos) Join SUB_DBASUB to SHP_DBASUB
- CUS to SUB (customer to subscriptions) Join CUS_DBACUS to SUB_DBACUS
The following pages contain lists of QuickFill’s ODBC tables and their fields. This information changes as QuickFill changes. Thus, we recommend that you refer to “About ODBC and QuickFill” in the built-in help system for an up-to-date, detailed list.

<table>
<thead>
<tr>
<th>BPK</th>
<th>Billing package record</th>
</tr>
</thead>
<tbody>
<tr>
<td>BPK_DBABPK</td>
<td>Billing package database address</td>
</tr>
<tr>
<td>BPK_CODE</td>
<td>Package code</td>
</tr>
<tr>
<td>BPK_FIXCOST</td>
<td>Fixed cost in pennies</td>
</tr>
<tr>
<td>BPK_VARCOST</td>
<td>Variable cost in pennies</td>
</tr>
<tr>
<td>BPK_CCINFO</td>
<td>Print credit card information block</td>
</tr>
<tr>
<td>BPK_DESC</td>
<td>Description</td>
</tr>
<tr>
<td>BPK_CIRC</td>
<td>Circular ID</td>
</tr>
<tr>
<td>BPK_LETT</td>
<td>Letter ID</td>
</tr>
<tr>
<td>BPK_CARD</td>
<td>Card ID</td>
</tr>
<tr>
<td>BPK_BUCK</td>
<td>Buckslip ID</td>
</tr>
<tr>
<td>BPK_ENV</td>
<td>Envelope ID</td>
</tr>
<tr>
<td>BPK_REPL</td>
<td>Reply envelope ID</td>
</tr>
<tr>
<td>BPK_FORM</td>
<td>Form set code</td>
</tr>
<tr>
<td>BPK_MISC1</td>
<td>Miscellaneous user field 1</td>
</tr>
<tr>
<td>BPK_MISC2</td>
<td>Miscellaneous user field 2</td>
</tr>
<tr>
<td>BPK_TYPE</td>
<td>Output type</td>
</tr>
<tr>
<td>BPK_CUSTCODE</td>
<td>Mail-merge format code</td>
</tr>
</tbody>
</table>
### Appendix F

**QuickFill’s ODBC tables**

<table>
<thead>
<tr>
<th>BSR</th>
<th>Billing series record</th>
</tr>
</thead>
<tbody>
<tr>
<td>BSR_DBABSR</td>
<td>Billing series database address</td>
</tr>
<tr>
<td>BSR_DBABPK1</td>
<td>Database address of billing package used for effort 1</td>
</tr>
<tr>
<td>BSR_DBABPK2</td>
<td>Database address of billing package used for effort 2</td>
</tr>
<tr>
<td>BSR_DBABPK3</td>
<td>Database address of billing package used for effort 3</td>
</tr>
<tr>
<td>BSR_DBABPK4</td>
<td>Database address of billing package used for effort 4</td>
</tr>
<tr>
<td>BSR_DBABPK5</td>
<td>Database address of billing package used for effort 5</td>
</tr>
<tr>
<td>BSR_DBABPK6</td>
<td>Database address of billing package used for effort 6</td>
</tr>
<tr>
<td>BSR_DBABPK7</td>
<td>Database address of billing package used for effort 7</td>
</tr>
<tr>
<td>BSR_DBABPK8</td>
<td>Database address of billing package used for effort 8</td>
</tr>
<tr>
<td>BSR_DBAMSG11</td>
<td>Database address of message 1 for effort 1</td>
</tr>
<tr>
<td>BSR_DBAMSG12</td>
<td>Database address of message 1 for effort 2</td>
</tr>
<tr>
<td>BSR_DBAMSG13</td>
<td>Database address of message 1 for effort 3</td>
</tr>
<tr>
<td>BSR_DBAMSG14</td>
<td>Database address of message 1 for effort 4</td>
</tr>
<tr>
<td>BSR_DBAMSG15</td>
<td>Database address of message 1 for effort 5</td>
</tr>
<tr>
<td>BSR_DBAMSG16</td>
<td>Database address of message 1 for effort 6</td>
</tr>
<tr>
<td>BSR_DBAMSG17</td>
<td>Database address of message 1 for effort 7</td>
</tr>
<tr>
<td>BSR_DBAMSG18</td>
<td>Database address of message 1 for effort 8</td>
</tr>
<tr>
<td>BSR_DBAMSG21</td>
<td>Database address of message 2 for effort 1</td>
</tr>
<tr>
<td>BSR_DBAMSG22</td>
<td>Database address of message 2 for effort 2</td>
</tr>
<tr>
<td>BSR_DBAMSG23</td>
<td>Database address of message 2 for effort 3</td>
</tr>
<tr>
<td>BSR_DBAMSG24</td>
<td>Database address of message 2 for effort 4</td>
</tr>
<tr>
<td>BSR_DBAMSG25</td>
<td>Database address of message 2 for effort 5</td>
</tr>
<tr>
<td>BSR_DBAMSG26</td>
<td>Database address of message 2 for effort 6</td>
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<td>BSR_DBAMSG27</td>
<td>Database address of message 2 for effort 7</td>
</tr>
<tr>
<td>BSR_DBAMSG28</td>
<td>Database address of message 2 for effort 8</td>
</tr>
<tr>
<td>BSR_CODE</td>
<td>Billing series code</td>
</tr>
<tr>
<td>BSR_DESC</td>
<td>Description</td>
</tr>
<tr>
<td>BSR_FBILLDAYS</td>
<td>Days after issue for first bill</td>
</tr>
<tr>
<td>BSR_FBILLDATE</td>
<td>Date of first bill</td>
</tr>
</tbody>
</table>

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# Appendix F

## QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>BSR_FBILLPOLICY</td>
<td>Billing policy flag</td>
</tr>
<tr>
<td>BSR_COMBO</td>
<td>True if billing series is eligible for combination billing</td>
</tr>
<tr>
<td>BSR_WHO1</td>
<td>Billto or Shipto for effort 1</td>
</tr>
<tr>
<td>BSR_WHO2</td>
<td>Billto or Shipto for effort 2</td>
</tr>
<tr>
<td>BSR_WHO3</td>
<td>Billto or Shipto for effort 3</td>
</tr>
<tr>
<td>BSR_WHO4</td>
<td>Billto or Shipto for effort 4</td>
</tr>
<tr>
<td>BSR_WHO5</td>
<td>Billto or Shipto for effort 5</td>
</tr>
<tr>
<td>BSR_WHO6</td>
<td>Billto or Shipto for effort 6</td>
</tr>
<tr>
<td>BSR_WHO7</td>
<td>Billto or Shipto for effort 7</td>
</tr>
<tr>
<td>BSR_WHO8</td>
<td>Billto or Shipto for effort 8</td>
</tr>
<tr>
<td>BSR_TIMING1</td>
<td>Days until next effort 1</td>
</tr>
<tr>
<td>BSR_TIMING2</td>
<td>Days until next effort 2</td>
</tr>
<tr>
<td>BSR_TIMING3</td>
<td>Days until next effort 3</td>
</tr>
<tr>
<td>BSR_TIMING4</td>
<td>Days until next effort 4</td>
</tr>
<tr>
<td>BSR_TIMING5</td>
<td>Days until next effort 5</td>
</tr>
<tr>
<td>BSR_TIMING6</td>
<td>Days until next effort 6</td>
</tr>
<tr>
<td>BSR_TIMING7</td>
<td>Days until next effort 7</td>
</tr>
<tr>
<td>BSR_TIMING8</td>
<td>Days until next effort 8</td>
</tr>
<tr>
<td>BSR_SUSPEND</td>
<td>Suspend on this effort</td>
</tr>
<tr>
<td>BSR_NUMEFFS</td>
<td>Number of efforts in series</td>
</tr>
<tr>
<td>BSR_PRTPUB1</td>
<td>Print publication name on top half of bill</td>
</tr>
<tr>
<td>BSR_PRTPUB2</td>
<td>Print publication name on bottom half of bill</td>
</tr>
<tr>
<td>BSR_DOCDESC1</td>
<td>Wording in lieu of “Subscription”</td>
</tr>
<tr>
<td>BSR_DOCDESC2</td>
<td>Wording in lieu of “Invoice”</td>
</tr>
<tr>
<td>BSR_DOCDESC3</td>
<td>Wording in lieu of “Please return…”</td>
</tr>
<tr>
<td>BSR_DOCDESC4</td>
<td>Wording in lieu of “For your”</td>
</tr>
<tr>
<td>BSR_DOCDESC5</td>
<td>Wording in lieu of “records”</td>
</tr>
</tbody>
</table>

## BTA

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BTA_DBABTA</td>
<td>Batch account record database address</td>
</tr>
<tr>
<td>BTA_DBABTH</td>
<td>Batch header database address</td>
</tr>
<tr>
<td>BTA_RENUNUM</td>
<td>Reference number</td>
</tr>
<tr>
<td>BTA_ORDNUM</td>
<td>Order number</td>
</tr>
<tr>
<td>BTA_AMOUNT</td>
<td>Amount in pennies</td>
</tr>
<tr>
<td>BTA_TYPE</td>
<td>Transaction type</td>
</tr>
<tr>
<td>BTA_PUB</td>
<td>Publication code</td>
</tr>
</tbody>
</table>

## Batch accounting record

- BTA_DBABTA: Batch account record database address
- BTA_DBABTH: Batch header database address
- BTA_RENUNUM: Reference number
- BTA_ORDNUM: Order number
- BTA_AMOUNT: Amount in pennies
- BTA_TYPE: Transaction type
- BTA_PUB: Publication code
## Appendix F

### QuickFill’s ODBC tables

**BTA_GLACCT**  General ledger account code  
**BTA_BASIS**  Accounting basis  

### BTH  Batch header record

- **BTH_DBABTH**  Batch header record database address  
- **BTH_DATE**  Batch date  
- **BTH_NUM**  Batch number  
- **BTH_TYPE**  Batch type

### BTL  Batch log record

- **BTL_DBABTL**  Batch log record database address  
- **BTL_DBABTH**  Batch header database address  
- **BTL_REFNUM**  Reference number  
- **BTL_ORDNUM**  Order number  
- **BTL_TYPE**  Transaction type  
- **BTL_PUB**  Publication code  
- **BTL_DESC**  Description

### BTP  Batch payment record

- **BTP_DBABTP**  Batch payment record database address  
- **BTP_DBABTH**  Batch header database address  
- **BTP_ORDNUM**  Order number  
- **BTP_PUB**  Publication code  
- **BTP_PAYTYPE**  Payment type  
- **BTP_CCNUM**  Credit card number  
- **BTP_CCEXPDT**  Credit card expiration date  
- **BTP_CCAUTH**  Credit card authorization

### CHN  Channel record

- **CHN_DBACHN**  Channel database address  
- **CHN_CODE**  Channel code  
- **CHN_DESC**  Description  
- **CHN_SOURCE**  Channel source
# Appendix F

## QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>CMB</th>
<th>Combo order record</th>
</tr>
</thead>
<tbody>
<tr>
<td>CMB_DBACMB</td>
<td>Combo order database address</td>
</tr>
<tr>
<td>CMB_DBABSR</td>
<td>Billing series database address</td>
</tr>
<tr>
<td>CMB_NUM</td>
<td>Combo number</td>
</tr>
<tr>
<td>CMB_DATE</td>
<td>Combo date</td>
</tr>
<tr>
<td>CMB_FIRSTBILLDATE</td>
<td>Date first bill was sent</td>
</tr>
<tr>
<td>CMB_LASTBILLDATE</td>
<td>Date last bill was sent</td>
</tr>
<tr>
<td>CMB_LASTBILLEFF</td>
<td>Last billing effort number</td>
</tr>
<tr>
<td>CMB_TOTALDUE</td>
<td>Total amount due</td>
</tr>
<tr>
<td>CMB_TOTALPAID</td>
<td>Total amount paid</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CNR</th>
<th>Cancel reasons record</th>
</tr>
</thead>
<tbody>
<tr>
<td>CNR_DBACNR</td>
<td>Cancel reason database address</td>
</tr>
<tr>
<td>CNR_CODE</td>
<td>Cancel reason code</td>
</tr>
<tr>
<td>CNR_DESC</td>
<td>Description</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>COM</th>
<th>Company record</th>
</tr>
</thead>
<tbody>
<tr>
<td>COM_DBACOM</td>
<td>Company database address</td>
</tr>
<tr>
<td>COM_CODE</td>
<td>Company code</td>
</tr>
<tr>
<td>COM_NAME</td>
<td>Company name</td>
</tr>
<tr>
<td>COM_STREET1</td>
<td>Street address 1</td>
</tr>
<tr>
<td>COM_STREET2</td>
<td>Street address 2</td>
</tr>
<tr>
<td>COM_CITY</td>
<td>City</td>
</tr>
<tr>
<td>COM_STATE</td>
<td>State</td>
</tr>
<tr>
<td>COM_ZIP</td>
<td>Zip</td>
</tr>
<tr>
<td>COM_COUNTRY</td>
<td>Country</td>
</tr>
<tr>
<td>COM_PHONE</td>
<td>Phone number</td>
</tr>
<tr>
<td>COM_FEDID</td>
<td>Federal tax ID</td>
</tr>
<tr>
<td>COM_ACCTPOL</td>
<td>Accounting policy</td>
</tr>
<tr>
<td>COM_NAME_ON_BILL</td>
<td>Print company name on bill</td>
</tr>
<tr>
<td>COM_NAME_ON_REN</td>
<td>Print company name on renewal</td>
</tr>
<tr>
<td>COM_AMEXM_MID</td>
<td>American Express merchant ID (mail)</td>
</tr>
<tr>
<td>COM_AMEXI_MID</td>
<td>American Express merchant ID (internet)</td>
</tr>
<tr>
<td>COM_VISA_MID</td>
<td>Visa merchant ID (mail)</td>
</tr>
<tr>
<td>COM_VISAI_MID</td>
<td>Visa merchant ID (internet)</td>
</tr>
<tr>
<td>COM_MASTM_MID</td>
<td>Mastercard merchant ID (mail)</td>
</tr>
</tbody>
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---

F.8  QuickFill
## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>COM_MASTI_MID</td>
<td>Mastercard merchant ID (internet)</td>
</tr>
<tr>
<td>COM_DISCM_MID</td>
<td>Discover merchant ID (mail)</td>
</tr>
<tr>
<td>COM_DISCI_MID</td>
<td>Discover merchant ID (internet)</td>
</tr>
<tr>
<td>COM_DINERSM_MID</td>
<td>Diner’s Club merchant ID (mail)</td>
</tr>
<tr>
<td>COM_DINERSI_MID</td>
<td>Diner’s Club merchant ID (internet)</td>
</tr>
<tr>
<td>COM_CCFORMATM</td>
<td>Credit card output format (mail)</td>
</tr>
<tr>
<td>COM_CCFORMATI</td>
<td>Credit card output format (internet)</td>
</tr>
<tr>
<td>COM_CLIENTIDM</td>
<td>Credit card client ID (mail)</td>
</tr>
<tr>
<td>COM_CLIENTIDI</td>
<td>Credit card client ID (internet)</td>
</tr>
<tr>
<td>COM_EXTRACT</td>
<td>Accounting extraction counter</td>
</tr>
<tr>
<td>COM_YEAR</td>
<td>Accounting year</td>
</tr>
<tr>
<td>COM_PERIOD</td>
<td>Accounting period</td>
</tr>
<tr>
<td>COM_GLFORMAT</td>
<td>File format for journal extract files</td>
</tr>
<tr>
<td>COM_GLSEPARATOR</td>
<td>Publication code/account code separator for journal extract files</td>
</tr>
<tr>
<td>COM_GLCREATE</td>
<td>Y if GL accounts should be created when published or modified</td>
</tr>
</tbody>
</table>

### County table record

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTY_DBACTY</td>
<td>County table database address</td>
</tr>
<tr>
<td>CTY_SEQ</td>
<td>Sequence number</td>
</tr>
<tr>
<td>CTY_DESC</td>
<td>County table description</td>
</tr>
<tr>
<td>CTY_FROMZIP</td>
<td>Low zip code</td>
</tr>
<tr>
<td>CTY_TOZIP</td>
<td>High zip code</td>
</tr>
</tbody>
</table>

### Customer record

<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CUS_DBACUS</td>
<td>Customer database address</td>
</tr>
<tr>
<td>CUS_CUSTNUM</td>
<td>Customer number</td>
</tr>
<tr>
<td>CUS_DEMCODEA</td>
<td>Demographic code A</td>
</tr>
<tr>
<td>CUS_DEMCODEB</td>
<td>Demographic code B</td>
</tr>
<tr>
<td>CUS_DEMCODEC</td>
<td>Demographic code C</td>
</tr>
<tr>
<td>CUS_DEMCODED</td>
<td>Demographic code D</td>
</tr>
<tr>
<td>CUS_CASSDATE</td>
<td>Date of CASS certification</td>
</tr>
<tr>
<td>CUS_CREATION_DATE</td>
<td>Date customer record was created</td>
</tr>
<tr>
<td>CUS_POSTAL_DATE</td>
<td>Date of last postal address change</td>
</tr>
<tr>
<td>CUS_EMAIL_DATE</td>
<td>Date of last email address change</td>
</tr>
</tbody>
</table>
### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CUS_FAX_DATE</td>
<td>Date of last fax number change</td>
</tr>
<tr>
<td>CUS_PHONE_DATE</td>
<td>Date of last phone number change</td>
</tr>
<tr>
<td>CUS_LASTFIRST</td>
<td>Last name/suffix, first name</td>
</tr>
<tr>
<td>CUS_FIRSTLAST</td>
<td>Prefix/First name/Last name/Suffix</td>
</tr>
<tr>
<td>CUS_LNAME</td>
<td>Last name</td>
</tr>
<tr>
<td>CUS_INITIAL</td>
<td>First initial</td>
</tr>
<tr>
<td>CUS_FNAME</td>
<td>First name</td>
</tr>
<tr>
<td>CUS_PREFNAME</td>
<td>Name prefix</td>
</tr>
<tr>
<td>CUS_SUFFIX</td>
<td>Name suffix</td>
</tr>
<tr>
<td>CUS_TITLE</td>
<td>Title</td>
</tr>
<tr>
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<td>Department</td>
</tr>
<tr>
<td>CUS_COMPANY</td>
<td>Company</td>
</tr>
<tr>
<td>CUS_STREET1</td>
<td>Street address 1</td>
</tr>
<tr>
<td>CUS_STREET2</td>
<td>Street address 2</td>
</tr>
<tr>
<td>CUS_CITY</td>
<td>City</td>
</tr>
<tr>
<td>CUS_STATE</td>
<td>State</td>
</tr>
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<tr>
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<td>CUS_BADSEED</td>
<td>Bad debt/Seed flag</td>
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<td>CUS_RENT_POSTAL</td>
<td>Postal address use flag</td>
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<td>Email address use flag</td>
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<td>Phone number use flag</td>
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<td>CUS_RENT_FAX</td>
<td>Fax number use flag</td>
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</tr>
<tr>
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_{QuickFill_}
## Appendix F

### QuickFill’s ODBC tables

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<thead>
<tr>
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<tr>
<td>CUS_FAX_VALID</td>
<td>For future use</td>
</tr>
<tr>
<td>CUS_DEMDATA1</td>
<td>Demographic data 1</td>
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<tr>
<td>CUS_DEMDATA2</td>
<td>Demographic data 2</td>
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**FOR (also FRN)**

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<td>Foreign country database address</td>
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<td>Foreign country code</td>
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<td>Foreign country name</td>
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<td>FOR_SHIPCLASS</td>
<td>Default shipping class</td>
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<td>Foreign postal code position</td>
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**GLO**

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<td>Sequence number</td>
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<td>GLO_HOME</td>
<td>Home country code</td>
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<td>GLO_LAST_WID</td>
<td>Last WID imported (applies to QFIE users)</td>
</tr>
<tr>
<td>GLO_MATCHCODE_FORMAT</td>
<td>Sort order for matchcode</td>
</tr>
<tr>
<td>GLO_DATE_FORMAT</td>
<td>Date format</td>
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<tr>
<td>GLO_MATCH</td>
<td>Minimum match requirement</td>
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<tr>
<td>GLO_MATCH_EXACT</td>
<td>Exact match score</td>
</tr>
<tr>
<td>GLO_MATCH_NEAR</td>
<td>Near match score</td>
</tr>
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<td>GLO_SHIPDESA-Z</td>
<td>Description for shipping classes A-Z</td>
</tr>
<tr>
<td>GLO_LNAME_SOUNDEX</td>
<td>Value for last name soundex mismatch</td>
</tr>
<tr>
<td>GLO_LNAME_ACTUAL</td>
<td>Value for last names mismatch</td>
</tr>
<tr>
<td>GLO_FNAME_INIT_NM</td>
<td>Value for first name initials mismatch</td>
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<tr>
<td>GLO_FNAME_INIT_OK</td>
<td>Value for full first name vs. initial</td>
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<td>Value for first name soundex mismatch</td>
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<tr>
<td>GLO_FNAME_ACTUAL</td>
<td>Value for first name mismatch</td>
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<tr>
<td>GLO_SUFFIX_MISMATCH</td>
<td>Value for suffix mismatch</td>
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## Appendix F

### QuickFill’s ODBC tables

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<td>Value for zip4 on one address only</td>
</tr>
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<td>GLO_ZIP4_MISMATCH</td>
<td>Value for zip4 mismatch</td>
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<tr>
<td>GLO_BOX_ONE_ONLY</td>
<td>Value for PO box on one address only</td>
</tr>
<tr>
<td>GLO_BOX_MISMATCH</td>
<td>Value for PO box mismatch</td>
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<tr>
<td>GLO_HOUSE_ONE_ONLY</td>
<td>Value for house number on one address only</td>
</tr>
<tr>
<td>GLO_HOUSE_MISMATCH</td>
<td>Value for house number mismatch</td>
</tr>
<tr>
<td>GLO_STREET_ONE_ONLY</td>
<td>Value for street1 on one address only</td>
</tr>
<tr>
<td>GLO_STREET_SOUNDEX</td>
<td>Value for street1 soundex mismatch</td>
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<tr>
<td>GLO_STREET_ACTUAL</td>
<td>Value for street1 mismatch</td>
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<tr>
<td>GLO_UNIT_ONE_ONLY</td>
<td>Value for unit number on one address only</td>
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<tr>
<td>GLO_UNIT_MISMATCH</td>
<td>Value for unit number mismatch</td>
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<td>Value for prefix direction on one address</td>
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<tr>
<td>GLO_PDIR_MISMATCH</td>
<td>Value for prefix direction mismatch</td>
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<tr>
<td>GLO_SDIR_ONE_ONLY</td>
<td>Value for suffix direction on one address</td>
</tr>
<tr>
<td>GLO_SDIR_MISMATCH</td>
<td>Value for suffix direction mismatch</td>
</tr>
<tr>
<td>GLO_COMP_ONE_ONLY</td>
<td>Value for company on one address only</td>
</tr>
<tr>
<td>GLO_COMP_SOUNDEX</td>
<td>Value for company soundex mismatch</td>
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<tr>
<td>GLO_COMP_ACTUAL</td>
<td>Value for company mismatch</td>
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<td>GLO_LABEL_MISMATCH</td>
<td>Value for label images mismatch</td>
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<tr>
<td>GLO_LIMIT_ADDRESS</td>
<td>Address length indicator</td>
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<tr>
<td>GLO_REGION1-6</td>
<td>Name for regions 1-6</td>
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<tr>
<td>GLO_RENT_POSTAL</td>
<td>Default allowed usage of postal address</td>
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<tr>
<td>GLO_RENT_EMAIL</td>
<td>Default allowed usage of email address</td>
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<tr>
<td>GLO_RENT_PHONE</td>
<td>Default allowed usage of phone number</td>
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<tr>
<td>GLO_RENT_FAX</td>
<td>Default allowed usage of fax number</td>
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<tr>
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<td>Unique database identifier</td>
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### GLX

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<td>GLX_ACCT</td>
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<td>Period to date amount in pennies</td>
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<td>GLX_YTDAMOUNT</td>
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<td>Inception to date amount in pennies</td>
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<td>GLX_UNEXAMOUNT</td>
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<td>Publication code for accounting system</td>
</tr>
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*QuickFill*
## QuickFill’s ODBC tables

### GLX_PASSACCT
- Account number for accounting system

### GLX_BASIS
- Accounting basis

### HIS

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<tr>
<td>HIS_DBASUB</td>
<td>Subscription database address</td>
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<tr>
<td>HIS_DATE</td>
<td>Date of transaction</td>
</tr>
<tr>
<td>HIS_BATCH</td>
<td>Batch number</td>
</tr>
<tr>
<td>HIS_TRAN</td>
<td>Transaction type</td>
</tr>
<tr>
<td>HIS_USER</td>
<td>QuickFill user ID associated with subscription</td>
</tr>
<tr>
<td>HIS_CRDB</td>
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</tr>
<tr>
<td>HIS_DUE</td>
<td>Amount due in pennies</td>
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<tr>
<td>HIS_DESC</td>
<td>Description</td>
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### ISS

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<td>Publication database address</td>
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<tr>
<td>ISS_PUB</td>
<td>Publication code</td>
</tr>
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<td>ISS_NUM</td>
<td>Issue number</td>
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<td>ISS_PAID</td>
<td>Non-comp copies served</td>
</tr>
<tr>
<td>ISS_COMP</td>
<td>Comp copies served</td>
</tr>
<tr>
<td>ISS_WEIGHT</td>
<td>Mailing weight</td>
</tr>
<tr>
<td>ISS_PAGES</td>
<td>Number of pages in issue</td>
</tr>
<tr>
<td>ISS_ADGPAGES</td>
<td>Number of ad pages in issue</td>
</tr>
<tr>
<td>ISS_DATE</td>
<td>Issue date</td>
</tr>
<tr>
<td>ISS_CALDATE</td>
<td>Issue date</td>
</tr>
<tr>
<td>ISS_DESC1</td>
<td>Issue description - part 1</td>
</tr>
<tr>
<td>ISS_DESC2</td>
<td>Issue description - part 2</td>
</tr>
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<td>ISS_VOLISS</td>
<td>Volume issue</td>
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<tr>
<td>ISS_AUDITISS</td>
<td>Audit issue</td>
</tr>
<tr>
<td>ISS_FREE</td>
<td>Free non-comp issues served</td>
</tr>
<tr>
<td>ISS_MAILD</td>
<td>Total copies mailed</td>
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### Subscription history record

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<td>Sequence number</td>
</tr>
<tr>
<td>HIS_DBASUB</td>
<td>Subscription database address</td>
</tr>
<tr>
<td>HIS_DATE</td>
<td>Date of transaction</td>
</tr>
<tr>
<td>HIS_BATCH</td>
<td>Batch number</td>
</tr>
<tr>
<td>HIS_TRAN</td>
<td>Transaction type</td>
</tr>
<tr>
<td>HIS_USER</td>
<td>QuickFill user ID associated with subscription</td>
</tr>
<tr>
<td>HIS_CRDB</td>
<td>Amount credited/debited in pennies</td>
</tr>
<tr>
<td>HIS_DUE</td>
<td>Amount due in pennies</td>
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<td>HIS_DESC</td>
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### Issue table

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<td>ISS_DBAPUB</td>
<td>Publication database address</td>
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<td>Publication code</td>
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<td>Issue number</td>
</tr>
<tr>
<td>ISS_PAID</td>
<td>Non-comp copies served</td>
</tr>
<tr>
<td>ISS_COMP</td>
<td>Comp copies served</td>
</tr>
<tr>
<td>ISS_WEIGHT</td>
<td>Mailing weight</td>
</tr>
<tr>
<td>ISS_PAGES</td>
<td>Number of pages in issue</td>
</tr>
<tr>
<td>ISS_ADGPAGES</td>
<td>Number of ad pages in issue</td>
</tr>
<tr>
<td>ISS_DATE</td>
<td>Issue date</td>
</tr>
<tr>
<td>ISS_CALDATE</td>
<td>Issue date</td>
</tr>
<tr>
<td>ISS_DESC1</td>
<td>Issue description - part 1</td>
</tr>
<tr>
<td>ISS_DESC2</td>
<td>Issue description - part 2</td>
</tr>
<tr>
<td>ISS_VOLNUM</td>
<td>Volume number</td>
</tr>
<tr>
<td>ISS_VOLISS</td>
<td>Volume issue</td>
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<tr>
<td>ISS_AUDITISS</td>
<td>Audit issue</td>
</tr>
<tr>
<td>ISS_FREE</td>
<td>Free non-comp issues served</td>
</tr>
<tr>
<td>ISS_MAILD</td>
<td>Total copies mailed</td>
</tr>
<tr>
<td>ISS_SINGLECOPIES</td>
<td>Single copies sold</td>
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## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>QuickFill’s ODBC tables</th>
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<tbody>
<tr>
<td>ISS_TRADESHOWS</td>
<td>Copies distributed at trade shows</td>
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<tr>
<td>ISS_LASTUPDT</td>
<td>Last update date and time</td>
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<tr>
<td>ISS_EIC_CURRENT</td>
<td>Earned income cash as current issue</td>
</tr>
<tr>
<td>ISS_EIC_BACK</td>
<td>Earned income cash as back issue</td>
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<tr>
<td>ISS_EIA_CURRENT</td>
<td>Earned income accrual as current issue</td>
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<tr>
<td>ISS_EIA_BACK</td>
<td>Earned income accrual as back issue</td>
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### LIS

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<td>List code</td>
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<td>LIS_DESC</td>
<td>Description</td>
</tr>
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<td>LIS_CPM</td>
<td>Cost per thousand in pennies</td>
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<td>Date of list</td>
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### MPK

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<th>Marketing package record</th>
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<td>MPK_VARCOST</td>
<td>Variable cost in pennies</td>
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<td>Description</td>
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<td>MPK_REPL</td>
<td>Reply envelope ID</td>
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### MPL

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<tr>
<td>MPL_DESC</td>
<td>Description</td>
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Appendix F

QuickFill’s ODBC tables

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<th>User’s Guide</th>
<th>F.15</th>
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MPL_HOUSE  

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<td>Message line 2</td>
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<td>Message line 3</td>
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<td>2nd premium database address</td>
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<td>3rd premium database address</td>
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<td>Price for region 3 in pennies</td>
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<td>Price for region 4 in pennies</td>
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<td>Free issues</td>
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<td>OFF_PREMDEL</td>
<td>Deliver premium with 1st issue</td>
</tr>
<tr>
<td>OFF_FBILLDAYS</td>
<td>Days until first bill</td>
</tr>
<tr>
<td>OFF_FBILLPOLICY</td>
<td>Billing policy flag</td>
</tr>
<tr>
<td>OFF_PUB</td>
<td>Publication code</td>
</tr>
<tr>
<td>OFF_DESC</td>
<td>Description</td>
</tr>
<tr>
<td>OFF_TERMDESC</td>
<td>Term description for renewal</td>
</tr>
<tr>
<td>OFF_FREE_TIMING</td>
<td>Free issues are first/last</td>
</tr>
<tr>
<td>OFF_FREEQUAL</td>
<td>Qualifications for free issues</td>
</tr>
<tr>
<td>OFF_PREMQUAL</td>
<td>Qualifications for premium</td>
</tr>
<tr>
<td>OFF_PREMBILLTO</td>
<td>Send premium to bill-to</td>
</tr>
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## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>ORD</th>
<th>Order record</th>
</tr>
</thead>
<tbody>
<tr>
<td>ORD_DBAORD</td>
<td>Order database address</td>
</tr>
<tr>
<td>ORD_DBASUB</td>
<td>Subscription database address</td>
</tr>
<tr>
<td>ORD_DBACMB</td>
<td>Combo database address</td>
</tr>
<tr>
<td>ORD_DBARSR</td>
<td>Renewal series database address</td>
</tr>
<tr>
<td>ORD_DBABSR</td>
<td>Billing series database address</td>
</tr>
<tr>
<td>ORD_DBASAG</td>
<td>Agency database address</td>
</tr>
<tr>
<td>ORD_NUM</td>
<td>Order number</td>
</tr>
<tr>
<td>ORD_COMBO</td>
<td>Combo number</td>
</tr>
<tr>
<td>ORD_PUB</td>
<td>Publication code</td>
</tr>
<tr>
<td>ORD_AGENCY</td>
<td>Agency code for subscription agency order</td>
</tr>
<tr>
<td>ORD_DATE</td>
<td>Order date</td>
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<tr>
<td>ORD_DBA_RENEWED_ORDER</td>
<td>Database address of the renewed order</td>
</tr>
<tr>
<td>ORD_DBA_RENEWAL_ORDER</td>
<td>Database address of the renewal order</td>
</tr>
<tr>
<td>ORD_DBA_REPLACED_ORDER</td>
<td>Database address of replaced order</td>
</tr>
<tr>
<td>ORD_DBA_REPLACEMENT_ORDER</td>
<td>Database address of replacement order</td>
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<tr>
<td>ORD_FIRSTISSUESERVED</td>
<td>Date first issue was served</td>
</tr>
<tr>
<td>ORD_LASTISSUESERVED</td>
<td>Date most recent issue was served</td>
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<tr>
<td>ORD_FBILLDATE</td>
<td>Send first bill on or after this date</td>
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<tr>
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<td>Date of the first bill</td>
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<tr>
<td>ORD_LASTBILLDATE</td>
<td>Date of most recent bill</td>
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<tr>
<td>ORD_LASTPAYDATE</td>
<td>Date of most recent payment</td>
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<tr>
<td>ORD_LASTRENDATE</td>
<td>Date of most recent renewal notice</td>
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<td>Date premium was sent</td>
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<td>Price of order in pennies</td>
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<td>Sales tax in pennies</td>
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<tr>
<td>ORD_SHIPPING</td>
<td>Shipping charge in pennies</td>
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<tr>
<td>ORD_FPRICEIN</td>
<td>Full price in pennies including tax and shipping</td>
</tr>
<tr>
<td>ORD_FPRICE</td>
<td>Full price in pennies after cancel adjustment</td>
</tr>
<tr>
<td>ORD_FPAY</td>
<td>Amount paid in pennies</td>
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<tr>
<td>ORD_REFUND</td>
<td>Amount refunded in pennies</td>
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<tr>
<td>ORD_REFUNDDUE</td>
<td>Refund amount in pennies not yet paid out</td>
</tr>
<tr>
<td>ORD_AR</td>
<td>Amount due in pennies</td>
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<tr>
<td>ORD_EIA</td>
<td>Earned income accrual in pennies</td>
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<tr>
<td>ORD_EIC</td>
<td>Earned income cash in pennies</td>
</tr>
<tr>
<td>ORD_DIA</td>
<td>Deferred income accrual in pennies</td>
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</tbody>
</table>
## Appendix F

**QuickFill’s ODBC tables**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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<tbody>
<tr>
<td>ORD_DIC</td>
<td>Deferred income cash in pennies</td>
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<tr>
<td>ORD_WOA</td>
<td>Writeoff accrual in pennies</td>
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<tr>
<td>ORD_CCAMT</td>
<td>Unprocessed credit card amount in pennies</td>
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<tr>
<td>ORD_DISCRATE</td>
<td>Discount rate for subscription agency order</td>
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<td>ORD_BATCH</td>
<td>Batch number</td>
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<tr>
<td>ORD_TYPE</td>
<td>Order type</td>
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<td>ORD_REPLACEMENT</td>
<td>Replacement order flag</td>
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<tr>
<td>ORD_CONTROLLED</td>
<td>Controlled order flag</td>
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<tr>
<td>ORD_WEB</td>
<td>Web order flag</td>
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<tr>
<td>ORD_QUANTITY</td>
<td>Number of copies</td>
</tr>
<tr>
<td>ORD_ISSUES</td>
<td>Number of issues</td>
</tr>
<tr>
<td>ORD_FREE</td>
<td>Number of free issues</td>
</tr>
<tr>
<td>ORD_EXT</td>
<td>Number of extension issues</td>
</tr>
<tr>
<td>ORD_ISSREM</td>
<td>Number of issues remaining</td>
</tr>
<tr>
<td>ORD_SERVED</td>
<td>Number of issues served</td>
</tr>
<tr>
<td>ORD_EARNSRVD</td>
<td>Number of earned issues served</td>
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<tr>
<td>ORD_FIRSTISS</td>
<td>Issue number of first issue served</td>
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<tr>
<td>ORD_FIRSTISSDATE</td>
<td>Issue date of first issue served</td>
</tr>
<tr>
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<td>Issue number of next issue to be served</td>
</tr>
<tr>
<td>ORD_NEXTISSDATE</td>
<td>Issue date of next issue to be served</td>
</tr>
<tr>
<td>ORD_LASTISS</td>
<td>Issue number of last issue served</td>
</tr>
<tr>
<td>ORD_LASTISSDATE</td>
<td>Issue date of last issue served</td>
</tr>
<tr>
<td>ORD_PREMQUAL</td>
<td>Qualified for premium</td>
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<td>Deliver premium with first issue</td>
</tr>
<tr>
<td>ORD_PREMBILLTO</td>
<td>Send premium to bill-to</td>
</tr>
<tr>
<td>ORD_PREMSRV</td>
<td>Premium served</td>
</tr>
<tr>
<td>ORD_FBILLDAYS</td>
<td>Days until first bill</td>
</tr>
<tr>
<td>ORD_LASTBILLEFF</td>
<td>Last billing effort number</td>
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<tr>
<td>ORD_RSPBILLNUM</td>
<td>Responded to billing effort</td>
</tr>
<tr>
<td>ORD_LASTRENEFF</td>
<td>Last renewal effort number</td>
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<tr>
<td>ORD_RSPRENUM</td>
<td>Responded to renewal effort</td>
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<tr>
<td>ORD_STATUS</td>
<td>Order status</td>
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<td>ORD_CBILLSENT</td>
<td>Cancel bill sent</td>
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<tr>
<td>ORD_DELTACAN</td>
<td>Order canceled</td>
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<tr>
<td>ORD_DELTAADJ</td>
<td>Order written off</td>
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<tr>
<td>ORD_DELTAPRF</td>
<td>Free issue served first</td>
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<td>Service code</td>
</tr>
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<td>Billing policy flag</td>
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# Appendix F

## QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>ORD_GIFTCOMP</td>
<td>Gift/Complimentary flag</td>
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<td>Shipping class</td>
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<td>Premium code</td>
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<td>Payment type</td>
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<td>Credit card number</td>
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<td>Credit card expiration date</td>
</tr>
<tr>
<td>ORD_CCAUTH</td>
<td>Credit card authorization</td>
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<tr>
<td>ORD_CVV2</td>
<td>Credit card verification value</td>
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<tr>
<td>ORD_PONUM</td>
<td>Purchase order number</td>
</tr>
<tr>
<td>ORD_TAXJR</td>
<td>Tax jurisdiction</td>
</tr>
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<td>ORD_SUBCLASS</td>
<td>Subscription class</td>
</tr>
<tr>
<td>ORD_REQTYPE</td>
<td>Request type</td>
</tr>
<tr>
<td>ORD_SOURCE</td>
<td>Order source code</td>
</tr>
<tr>
<td>ORD_CHANNEL</td>
<td>Order channel code</td>
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<tr>
<td>ORD_CNREASON</td>
<td>Cancel reason code</td>
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### PAY

<table>
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<th>Description</th>
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<tr>
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<td>Payment transaction record database address</td>
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<tr>
<td>PAY_DBASUB</td>
<td>Subscription database address</td>
</tr>
<tr>
<td>PAY_PUB</td>
<td>Publication code</td>
</tr>
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<td>PAY_ORDNUM</td>
<td>Order number</td>
</tr>
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<td>PAY_ORDTYPE</td>
<td>Order type</td>
</tr>
<tr>
<td>PAY_ORDDATE</td>
<td>Order date</td>
</tr>
<tr>
<td>PAY_ORDPRICE</td>
<td>Order price in pennies</td>
</tr>
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<td>PAY_COPIES</td>
<td>Number of copies</td>
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<td>PAY_TRANDATE</td>
<td>Transaction date</td>
</tr>
<tr>
<td>PAY_tran</td>
<td>Transaction type</td>
</tr>
<tr>
<td>PAY_AMOUNT</td>
<td>Amount of the transaction in pennies</td>
</tr>
<tr>
<td>PAY_TYPE</td>
<td>Payment type</td>
</tr>
<tr>
<td>PAY_CCNUM</td>
<td>Credit card number or check number</td>
</tr>
<tr>
<td>PAY_SUBCHANNEL</td>
<td>Original subscription channel code</td>
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<td>PAY_ORDCHANNEL</td>
<td>Order channel (for new and renewal orders)</td>
</tr>
<tr>
<td>PAY_CUSTNUM</td>
<td>Customer number for the bill-to customer</td>
</tr>
<tr>
<td>PAY_NAME</td>
<td>Lastname/suffix, firstname for bill-to customer</td>
</tr>
<tr>
<td>PAY_COMPANY</td>
<td>Company name for the bill-to customer</td>
</tr>
<tr>
<td>PAY_STATE</td>
<td>State for the bill-to customer</td>
</tr>
</tbody>
</table>

QuickFill
## Appendix F

**QuickFill’s ODBC tables**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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<tbody>
<tr>
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<td>Zip/postal code for the bill-to customer</td>
</tr>
<tr>
<td>PAY_CNTRYCODE</td>
<td>Country code for the bill-to customer</td>
</tr>
<tr>
<td>PAY_ACTIVEP</td>
<td>The number of active periodical subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_ACTIVEB</td>
<td>The number of active book subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_ACTIVES</td>
<td>The number of active service subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_ACTIVEC</td>
<td>The number of active conference subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_ACTIVEM</td>
<td>The number of active membership subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_ACTIVEO</td>
<td>The number of active online service subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_INACTIVEP</td>
<td>The number of inactive periodical subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_INACTIVEB</td>
<td>The number of inactive book subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_INACTIVES</td>
<td>The number of inactive service subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_INACTIVEC</td>
<td>The number of inactive conference subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_INACTIVEM</td>
<td>The number of inactive membership subscriptions held by the bill-to customer</td>
</tr>
<tr>
<td>PAY_INACTIVEO</td>
<td>The number of inactive online service subscriptions held by the bill-to customer</td>
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### PRE

**Premium record**

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<td>Premium record database address</td>
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<td>PRE_CODE</td>
<td>Premium code</td>
</tr>
<tr>
<td>PRE_DESC</td>
<td>Premium description</td>
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<tr>
<td>PRE_PICKNUM</td>
<td>Pick number</td>
</tr>
<tr>
<td>PRE_REPRINT</td>
<td>Editorial reprint</td>
</tr>
<tr>
<td>PRE_VALUE</td>
<td>Value of the premium in pennies</td>
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### PRO

**Prospect record**

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<tr>
<td>PRO_DBACUS</td>
<td>Customer database address</td>
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## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
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<th>List database address</th>
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<td>Prospect date</td>
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<td>PRO_PUB</td>
<td>Publication code</td>
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<tr>
<td>PRO_LIST</td>
<td>List code</td>
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<td>PRO_REQTYPE</td>
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**PUB**

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<td>Company database address</td>
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<tr>
<td>PUB_DBATAX</td>
<td>Tax table database address</td>
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<tr>
<td>PUB_DBASPT</td>
<td>Split table database address</td>
</tr>
<tr>
<td>PUB_DBAZON</td>
<td>Periodical class zone table database address</td>
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<tr>
<td>PUB_DBACTY</td>
<td>County table database address</td>
</tr>
<tr>
<td>PUB_DBASCF</td>
<td>SCF table database address</td>
</tr>
<tr>
<td>PUB_DBARSR</td>
<td>Default renewal series database address</td>
</tr>
<tr>
<td>PUB_DBABSRSR</td>
<td>Default billing series database address</td>
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<td>Publication code</td>
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<tr>
<td>PUB_NEWISS</td>
<td>Database address for the issue record marked with the new orders issue pointer</td>
</tr>
<tr>
<td>PUB_EXPISS</td>
<td>Database address for the issue record marked with the controlled expire issue pointer</td>
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<tr>
<td>PUB_MINREFUND</td>
<td>Minimum refund amount in pennies</td>
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<tr>
<td>PUB_OVERPAYREF</td>
<td>Auto refund of overpayments</td>
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<td>Issues per year</td>
</tr>
<tr>
<td>PUB_GRACEISS</td>
<td>Grace issues</td>
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<tr>
<td>PUB_RENEWBACK</td>
<td>Maximum issues to backstart renewal</td>
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<tr>
<td>PUB_REINSBACK</td>
<td>Maximum issues to backstart reinstate</td>
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<td>Bill unpaid balance on cancel</td>
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<tr>
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<td>Label top line option 2</td>
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<tr>
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</tr>
<tr>
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### Appendix F

**QuickFill’s ODBC tables**

<table>
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<tr>
<td>PUB_AUDIT_TYPE</td>
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<td>PUB_FBILLDAYS</td>
<td>Days until first bill</td>
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<tr>
<td>PUB_MINGRACE</td>
<td>Minimum term for gracing</td>
</tr>
<tr>
<td>PUB_DEDUCT_GRACED</td>
<td>Deduct graced issues from renewal</td>
</tr>
<tr>
<td>PUB_ACTIVE</td>
<td>Print issue labels</td>
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<td>PUB_ORDERS</td>
<td>Accept orders</td>
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<td>Export publication to the QFIE web server</td>
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<td>Publication name part 1</td>
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<tr>
<td>PUB_NAME2</td>
<td>Publication name part 2</td>
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<td>PUB_PAYTO</td>
<td>Checks payable to</td>
</tr>
<tr>
<td>PUB_QFMDATE</td>
<td>Date of qualification form</td>
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<tr>
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<td>Shipping code override for region 1</td>
</tr>
<tr>
<td>PUB_OVERRIDE_SHIP2</td>
<td>Shipping code override for region 2</td>
</tr>
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<td>Shipping code override for region 3</td>
</tr>
<tr>
<td>PUB_OVERRIDE_SHIP4</td>
<td>Shipping code override for region 4</td>
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<td>Shipping code override for region 5</td>
</tr>
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<td>Shipping code override for region 6</td>
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<td>Minimum cancel amount in pennies</td>
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<tr>
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<td>Pricing scheme</td>
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<td>Charge tax on shipping</td>
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<td>Qual data required for paid subscriptions flag</td>
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<td>Minimum label group size for presort</td>
</tr>
<tr>
<td>PUB_DELAY_RENBILL</td>
<td>Delay renewal bill</td>
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<tr>
<td>PUB_SHIPCOSTA-Z</td>
<td>Shipping cost per issue in pennies for shipping classes A-Z</td>
</tr>
<tr>
<td>PUB_PRESORT</td>
<td>Presort flags (for each shipping class)</td>
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**QDT**

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<th>Field</th>
<th>Description</th>
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<tr>
<td>QDT_DBAQDT</td>
<td>Qualification data database address</td>
</tr>
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<td>Sequence number</td>
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<tr>
<td>QDT_DBASHP</td>
<td>Ship-to database address</td>
</tr>
<tr>
<td>QDT_DATE</td>
<td>Qualification date</td>
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</table>

*User’s Guide*
### Appendix F

#### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>QFM</th>
<th>Qualification form record</th>
</tr>
</thead>
<tbody>
<tr>
<td>QFM_SEQ</td>
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</tr>
<tr>
<td>QFM_DBAQFM</td>
<td>Qualification form database address</td>
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<tr>
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<td>Publication database address</td>
</tr>
<tr>
<td>QFM_QUEST</td>
<td>Question number</td>
</tr>
<tr>
<td>QFM_QUESTDESC</td>
<td>Question description</td>
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<td>QFM_REQD</td>
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<td>QFM_VALUES</td>
<td>Number of values that may be entered</td>
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<tr>
<td>QFM_CODE</td>
<td>Code value</td>
</tr>
<tr>
<td>QFM_CODEDESC</td>
<td>Code description</td>
</tr>
<tr>
<td>QFM_DISP_SEQ</td>
<td>Display sequence number for web server</td>
</tr>
<tr>
<td>QFM_TAB_ORDER</td>
<td>Table column order for web server</td>
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<tr>
<td>QFM_DISP_TYPE</td>
<td>Question display type for web server</td>
</tr>
<tr>
<td>QFM_OTHER_BOX</td>
<td>Other box required on web server</td>
</tr>
<tr>
<td>QFM_EXQUESTDESC</td>
<td>Extended question description for web server</td>
</tr>
<tr>
<td>QFM_EXCODEDESC</td>
<td>Extended code description for web server</td>
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<table>
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<tr>
<th>REF</th>
<th>Renewal effort record</th>
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</thead>
<tbody>
<tr>
<td>REF_DBAREF</td>
<td>Renewal effort database address</td>
</tr>
<tr>
<td>REF_DBAPUB</td>
<td>Publication database address</td>
</tr>
<tr>
<td>REF_DBARPK</td>
<td>Renewal package database address</td>
</tr>
<tr>
<td>REF_DBAOFF1</td>
<td>Offer database address 1</td>
</tr>
<tr>
<td>REF_DBAOFF2</td>
<td>Offer database address 2</td>
</tr>
<tr>
<td>REF_DBAOFF3</td>
<td>Offer database address 3</td>
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<tr>
<td>REF_DBAOFF4</td>
<td>Offer database address 4</td>
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<td>REF_DBAOFF5</td>
<td>Offer database address 5</td>
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<td>REF_DBACHN</td>
<td>Channel database address</td>
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<td>REF_PUB</td>
<td>Publication code</td>
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<td>REF_CODE</td>
<td>Renewal effort code</td>
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### QuickFill’s ODBC tables

**REF DESC**
- Description

**REF DATEMAIL**
- Date mailed

**REF QTYMAIL**
- Quantity mailed

**REF PREPAY DOLLARS**
- Prepayment discount in pennies

**REF PREPAY PERCENT**
- Prepayment discount as a percentage, scaled by 100

**RNL**
- Run log record
  - RNL DBARNL: Run log database address
  - RNL DATETIME: Run date and time
  - RNL BUILD: QuickFill build number
  - RNL DESC: Run description
  - RNL PUB: Publication code (for updates only)
  - RNL CURRISS: Current issue (for updates only)
  - RNL NOW_LATER: Run now, run later indicator
  - RNL USER: QuickFill user associated with the run
  - RNL MACHINE: Computer name of the machine associated with the run
  - RNL PARM: Run parameters

**RPK**
- Renewal package record
  - RPK DBARPK: Renewal package database address
  - RPK CODE: Package code
  - RPK FIXCOST: Fixed cost in pennies
  - RPK VARCOST: Variable cost in pennies
  - RPK CCINFO: Print credit card information block
  - RPK DESC: Description
  - RPK CIRC: Circular ID
  - RPK LETT: Letter ID
  - RPK CARD: Card ID
  - RPK BUCK: Buckslip ID
  - RPK ENV: Envelope ID
  - RPK REPL: Reply envelope ID
  - RPK FORM: Form set code
  - RPK MISC1: Miscellaneous user field 1
  - RPK MISC2: Miscellaneous user field 2
# Appendix F

## QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
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<tr>
<td>RPK_CUSTCODE</td>
<td>Mail-merge format code</td>
</tr>
<tr>
<td>RPK_DELIVERY</td>
<td>Delivery method</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>RQS</td>
<td>Requalification source</td>
</tr>
<tr>
<td>RQS_DBARQS</td>
<td>Requalification source database address</td>
</tr>
<tr>
<td>RQS_CODE</td>
<td>Requalification source code</td>
</tr>
<tr>
<td>RQS_DESC</td>
<td>Requalification source description</td>
</tr>
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<td>Date mailed</td>
</tr>
<tr>
<td>RQS_QTYMAIL</td>
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<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RSR</td>
<td>Renewal series record (no message links)</td>
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<td>Renewal series database address</td>
</tr>
<tr>
<td>RSR_DBAPUB</td>
<td>Publication database address</td>
</tr>
<tr>
<td>RSR_DBAREF1</td>
<td>Database address of renewal effort 1</td>
</tr>
<tr>
<td>RSR_DBAREF2</td>
<td>Database address of renewal effort 2</td>
</tr>
<tr>
<td>RSR_DBAREF3</td>
<td>Database address of renewal effort 3</td>
</tr>
<tr>
<td>RSR_DBAREF4</td>
<td>Database address of renewal effort 4</td>
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<tr>
<td>RSR_DBAREF5</td>
<td>Database address of renewal effort 5</td>
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<td>RSR_DBAREF6</td>
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<tr>
<td>RSR_DBAREF7</td>
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<tr>
<td>RSR_DBAREF8</td>
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<td>RSR_DBAREF9</td>
<td>Database address of renewal effort 9</td>
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<tr>
<td>RSR_DBAREF10</td>
<td>Database address of renewal effort 10</td>
</tr>
<tr>
<td>RSR_DBAREF11</td>
<td>Database address of renewal effort 11</td>
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<tr>
<td>RSR_DBAREF12</td>
<td>Database address of renewal effort 12</td>
</tr>
<tr>
<td>RSR_DBARSR_NEXT</td>
<td>Database address of next renewal series</td>
</tr>
</tbody>
</table>

*Note: Renewal series table and Microsoft Access*

Microsoft Access has a limit of 32 indexes for ODBC tables. If you are using Microsoft Access and want to use renewal series data from QuickFill, you can either use the RSR table (this table does not contain links to the messages used by a renewal series) or, if you have some technical expertise in using Access, use the RSX table (this table contains links to the messages used by a renewal series) and write SQL pass-through queries to get around this limitation.
### Appendix F

**QuickFill’s ODBC tables**

<table>
<thead>
<tr>
<th>Table Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RSR_DBARSR_NEXT_CONTR</td>
<td>Database address of next renewal series for controlled subscriptions (audit system)</td>
</tr>
<tr>
<td>RSR_DABRSR_NEXT_GIFT</td>
<td>Database address of next renewal series for gift subscriptions</td>
</tr>
<tr>
<td>RSR_DBABSR_NEXT</td>
<td>Database address of next billing series</td>
</tr>
<tr>
<td>RSR_DBABSR_NEXT_GIFT</td>
<td>Database address of next billing series for gift subscriptions</td>
</tr>
<tr>
<td>RSR_PUB</td>
<td>Publication code</td>
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<tr>
<td>RSR_CODE</td>
<td>Renewal series code</td>
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<tr>
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<td>Description</td>
</tr>
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<td>Series type</td>
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<tr>
<td>RSR_WITHISS2</td>
<td>With issue for effort 2</td>
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<td>RSR_WITHISS3</td>
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<td>RSR_WITHISS4</td>
<td>With issue for effort 4</td>
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<td>RSR_WITHISS5</td>
<td>With issue for effort 5</td>
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</tr>
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<td>RSR_WHO2</td>
<td>Billto or Shipto for effort 2</td>
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<td>Billto or Shipto for effort 3</td>
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<td>Billto or Shipto for effort 11</td>
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<td>RSR_WHO12</td>
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<tr>
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<tr>
<td>RSR_TIMING2</td>
<td>Days between or issues remaining 2</td>
</tr>
<tr>
<td>RSR_TIMING3</td>
<td>Days between or issues remaining 3</td>
</tr>
</tbody>
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Appendix F

QuickFill’s ODBC tables

<table>
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<tr>
<th>Field</th>
<th>Description</th>
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<tbody>
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<td>Days between or issues remaining 5</td>
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<td>Days between or issues remaining 12</td>
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<td>Start when issues remaining</td>
</tr>
<tr>
<td>RSR_STARTDAYS</td>
<td>Days delay before starting</td>
</tr>
<tr>
<td>RSR_ENDISSUE</td>
<td>End when issues remaining</td>
</tr>
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<td>Send notice for agency subscriptions to subscriber</td>
</tr>
<tr>
<td>RSR_AUTORENEW</td>
<td>Auto-renewal series</td>
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<tr>
<td>RSR_CCREUSE</td>
<td>Re-use credit card</td>
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<tr>
<td>RSR_PRTPONUM</td>
<td>Print purchase order number</td>
</tr>
<tr>
<td>RSR_PRTPUB1</td>
<td>Print pub name on top half</td>
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<td>RSR_PRTPUB2</td>
<td>Print pub name on bottom half</td>
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<td>Wording in lieu of “Subscription”</td>
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<td>Wording in lieu of “Renewal”</td>
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<td>Wording in lieu of “Please return”</td>
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<td>Wording in lieu of “For your”</td>
</tr>
<tr>
<td>RSR_DOCDESC5</td>
<td>Wording in lieu of “records”</td>
</tr>
</tbody>
</table>

**RSX**

Renewal series record (with message links)

Note: Renewal series table and Microsoft Access

Microsoft Access has a limit of 32 indexes for ODBC tables. If you are using Microsoft Access and want to use renewal series data from QuickFill, you can either use the RSR table (this table does not contain links to the messages used by a renewal series) or, if you have some technical expertise in using Access, use the RSX table (this table contains links to the messages used by a renewal series) and write SQL pass-through queries to get around this limitation.

<table>
<thead>
<tr>
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<th>Description</th>
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<tbody>
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<td>Renewal series database address</td>
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</tbody>
</table>
## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Database Address</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RSX_DBAPUB</td>
<td>Publication database address</td>
</tr>
<tr>
<td>RSX_DBAREF1</td>
<td>Database address of renewal effort 1</td>
</tr>
<tr>
<td>RSX_DBAREF2</td>
<td>Database address of renewal effort 2</td>
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<tr>
<td>RSX_DBAREF3</td>
<td>Database address of renewal effort 3</td>
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<td>Database address of renewal effort 4</td>
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<td>Database address of renewal effort 12</td>
</tr>
<tr>
<td>RSX_DBAMSG11</td>
<td>Database address of message 1 for effort 1</td>
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<tr>
<td>RSX_DBAMSG12</td>
<td>Database address of message 1 for effort 2</td>
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<td>RSX_DBAMSG13</td>
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</tr>
<tr>
<td>RSX_DBAMSG212</td>
<td>Database address of next renewal series</td>
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</table>
Appendix F

QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RSX_DBARSX_NEXT_CONTR</td>
<td>Database address of next renewal series for controlled subscriptions (audit system)</td>
</tr>
<tr>
<td>RSX_DABRSX_NEXT_GIFT</td>
<td>Database address of next renewal series for gift subscriptions</td>
</tr>
<tr>
<td>RSX_DBABSR_NEXT</td>
<td>Database address of next billing series</td>
</tr>
<tr>
<td>RSX_DBABSR_NEXT_GIFT</td>
<td>Database address of next billing series for gift subscriptions</td>
</tr>
<tr>
<td>RSX_PUB</td>
<td>Publication code</td>
</tr>
<tr>
<td>RSX_CODE</td>
<td>Renewal series code</td>
</tr>
<tr>
<td>RSX_DESC</td>
<td>Description</td>
</tr>
<tr>
<td>RSX_TYPE</td>
<td>Series type</td>
</tr>
<tr>
<td>RSX_WITHISS1</td>
<td>With issue for effort 1</td>
</tr>
<tr>
<td>RSX_WITHISS2</td>
<td>With issue for effort 2</td>
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<tr>
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<td>With issue for effort 3</td>
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<td>Billto or Shipto for effort 2</td>
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<td>Billto or Shipto for effort 3</td>
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<td>Billto or Shipto for effort 4</td>
</tr>
<tr>
<td>RSX_WHO5</td>
<td>Billto or Shipto for effort 5</td>
</tr>
<tr>
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<td>Billto or Shipto for effort 6</td>
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<td>Billto or Shipto for effort 7</td>
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<td>Billto or Shipto for effort 11</td>
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<td>RSX_WHO12</td>
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<tr>
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<td>Days between or issues remaining 1</td>
</tr>
<tr>
<td>RSX_TIMING2</td>
<td>Days between or issues remaining 2</td>
</tr>
<tr>
<td>RSX_TIMING3</td>
<td>Days between or issues remaining 3</td>
</tr>
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## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Table</th>
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<tbody>
<tr>
<td>RSX_TIMING4</td>
<td>Days between or issues remaining 4</td>
</tr>
<tr>
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<td>Days between or issues remaining 5</td>
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<tr>
<td>RSX_TIMING6</td>
<td>Days between or issues remaining 6</td>
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<tr>
<td>RSX_TIMING7</td>
<td>Days between or issues remaining 7</td>
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<td>RSX_TIMING8</td>
<td>Days between or issues remaining 8</td>
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<td>RSX_TIMING9</td>
<td>Days between or issues remaining 9</td>
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<td>RSX_TIMING10</td>
<td>Days between or issues remaining 10</td>
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<tr>
<td>RSX_TIMING11</td>
<td>Days between or issues remaining 11</td>
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<tr>
<td>RSX_TIMING12</td>
<td>Days between or issues remaining 12</td>
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<tr>
<td>RSX_NUMEFFS</td>
<td>Number of efforts in series</td>
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<tr>
<td>RSX_STARTISSUE</td>
<td>Start when issues remaining</td>
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<tr>
<td>RSX_STARTDAYS</td>
<td>Days delay before starting</td>
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<tr>
<td>RSX_ENDISSUE</td>
<td>End when issues remaining</td>
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<td>RSX_AGENCY</td>
<td>Send notice for agency subscriptions to customer</td>
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<tr>
<td>RSX_AUTORENEW</td>
<td>Auto-renewal series</td>
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<td>RSX_CCREUSE</td>
<td>Re-use credit card</td>
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<td>RSX_PRTPONUM</td>
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<td>RSX_PRTPUB1</td>
<td>Print pub name on top half</td>
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<tr>
<td>RSX_PRTPUB2</td>
<td>Print pub name on bottom half</td>
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<td>RSX_DOCDESC1</td>
<td>Wording in lieu of “Subscription”</td>
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<tr>
<td>RSX_DOCDESC2</td>
<td>Wording in lieu of “Renewal”</td>
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<tr>
<td>RSX_DOCDESC3</td>
<td>Wording in lieu of “Please return”</td>
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<tr>
<td>RSX_DOCDESC4</td>
<td>Wording in lieu of “For your”</td>
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<td>RSX_DOCDESC5</td>
<td>Wording in lieu of “records”</td>
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### Subscription agency record

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<td>Agency database address</td>
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<td>SAG_CODE</td>
<td>Agency code</td>
</tr>
<tr>
<td>SAG_NAME</td>
<td>Company name</td>
</tr>
<tr>
<td>SAG_DEPT</td>
<td>Department name</td>
</tr>
<tr>
<td>SAG_STREET1</td>
<td>Street address 1</td>
</tr>
<tr>
<td>SAG_STREET2</td>
<td>Street address 2</td>
</tr>
<tr>
<td>SAG_CITY</td>
<td>City</td>
</tr>
<tr>
<td>SAG_STATE</td>
<td>State</td>
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<tr>
<td>SAG_ZIP</td>
<td>Zip</td>
</tr>
<tr>
<td>SAG_CNTRYCODE</td>
<td>Country code</td>
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## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Table</th>
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</tr>
</thead>
<tbody>
<tr>
<td>SAG_COUNTRY</td>
<td>Country name</td>
</tr>
<tr>
<td>SAG_PHONE</td>
<td>Phone number</td>
</tr>
<tr>
<td>SAG_FAX</td>
<td>Fax number</td>
</tr>
<tr>
<td>SAG_EMAIL</td>
<td>Email address</td>
</tr>
<tr>
<td>SAG_FORMAT</td>
<td>Foreign postal code position</td>
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<tr>
<td>SAG_DISCTRTENEW</td>
<td>Discount rate new orders (scaled by 100, e.g., 7.5% = 750)</td>
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<tr>
<td>SAG_DISCTRTEREN</td>
<td>Discount rate renewal orders (scaled by 100, e.g., 7.5% = 750)</td>
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<td>SCF</td>
<td>SCF table record</td>
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<tr>
<td>SCF_DBACTY</td>
<td>SCF table database address</td>
</tr>
<tr>
<td>SCF_SEQ</td>
<td>Sequence number</td>
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<tr>
<td>SCF_DESC</td>
<td>SCF table description</td>
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<tr>
<td>SCF_FROMZIP</td>
<td>Low zip</td>
</tr>
<tr>
<td>SCF_TOZIP</td>
<td>High zip</td>
</tr>
<tr>
<td>SHP</td>
<td>Ship-to record</td>
</tr>
<tr>
<td>SHP_DBASHP</td>
<td>Ship-to database address</td>
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<tr>
<td>SHP_DBASUB</td>
<td>Subscription database address</td>
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<tr>
<td>SHP_DBACUS</td>
<td>Ship-to customers database address</td>
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<tr>
<td>SHP_QUANTITY</td>
<td>Ship-to quantity</td>
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<tr>
<td>SHP_SHIPCLASS</td>
<td>Ship-to shipping class</td>
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<td>SHP_RENEW_FLAG</td>
<td>Individually renewed flag</td>
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<tr>
<td>SHP_PRIOR_QUANTITY</td>
<td>Ship-to prior quantity</td>
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<td>Customer number</td>
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<tr>
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<td>Demographic code B</td>
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<tr>
<td>SHP_DEMCODEC</td>
<td>Demographic code C</td>
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<tr>
<td>SHP_DEMCODED</td>
<td>Demographic code D</td>
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<td>SHP_CASSDATE</td>
<td>Date of CASS certification</td>
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<tr>
<td>SHP_CREATION_DATE</td>
<td>Date customer record was created</td>
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<td>SHP_POSTAL_DATE</td>
<td>Date of last postal address change</td>
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<tr>
<td>SHP_EMAIL_DATE</td>
<td>Date of last email address change</td>
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<tr>
<td>SHP_FAX_DATE</td>
<td>Date of last fax number change</td>
</tr>
<tr>
<td>SHP_PHONE_DATE</td>
<td>Date of last phone number change</td>
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<td>SHP_LASTFIRST</td>
<td>Last name/suffix, first name</td>
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## Appendix F

### QuickFill's ODBC tables

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>SHP_FIRSTLAST</td>
<td>Prefix/first name/last name/suffix</td>
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<tr>
<td>SHP_LNAME</td>
<td>Last name</td>
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<tr>
<td>SHP_INITIAL</td>
<td>First initial</td>
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<tr>
<td>SHP_FNAME</td>
<td>First name</td>
</tr>
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<td>SHP_PREFIX</td>
<td>Name prefix</td>
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<tr>
<td>SHP_SUFFIX</td>
<td>Name suffix</td>
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<tr>
<td>SHP_TTITLE</td>
<td>Title</td>
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<td>Company</td>
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<tr>
<td>SHP_STREET1</td>
<td>Street address 1</td>
</tr>
<tr>
<td>SHP_STREET2</td>
<td>Street address 2</td>
</tr>
<tr>
<td>SHP_CITY</td>
<td>City</td>
</tr>
<tr>
<td>SHP_STATE</td>
<td>State</td>
</tr>
<tr>
<td>SHP_ZIP</td>
<td>Zip/Postal code</td>
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<tr>
<td>SHP_ZIP2</td>
<td>Zip+2</td>
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<td>SHP_CARRT</td>
<td>Carrier route</td>
</tr>
<tr>
<td>SHP_CTRYCODE</td>
<td>Country code</td>
</tr>
<tr>
<td>SHP_COUNTRY</td>
<td>Country name</td>
</tr>
<tr>
<td>SHP_TAXJR</td>
<td>Tax jurisdiction</td>
</tr>
<tr>
<td>SHP_PHONE</td>
<td>Phone number</td>
</tr>
<tr>
<td>SHP_FAX</td>
<td>Fax number</td>
</tr>
<tr>
<td>SHP_EMAIL</td>
<td>Email address</td>
</tr>
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<td>SHP_USERID</td>
<td>User ID</td>
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<td>Password</td>
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<td>SHP_SALUTE</td>
<td>Salutation</td>
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<tr>
<td>SHP_SEX</td>
<td>Sex</td>
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<td>Taxable</td>
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<td>Random number</td>
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<td>SHP_BADSEED</td>
<td>Bad debt/Seed flag</td>
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</tr>
<tr>
<td>SHP_RENT_EMAIL</td>
<td>Email address use flag</td>
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<tr>
<td>SHP_RENT_PHONE</td>
<td>Phone number use flag</td>
</tr>
<tr>
<td>SHP_RENT_FAX</td>
<td>Fax number use flag</td>
</tr>
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<td>For future use</td>
</tr>
<tr>
<td>SHP_EMAIL_VALID</td>
<td>For future use</td>
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<tr>
<td>SHP_PHONE_VALID</td>
<td>For future use</td>
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<td>SHP_FAX_VALID</td>
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<td>Demographic data 1</td>
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<tr>
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<td>Demographic data 2</td>
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## Appendix F

### QuickFill’s ODBC tables

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<tr>
<th>SHP_FORMAT</th>
<th>Foreign postal code position</th>
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<td>Match code</td>
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<td><strong>SPL</strong></td>
<td><strong>Split record</strong></td>
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<td>Split code database address</td>
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<tr>
<td>SPL_CODE</td>
<td>Split code</td>
</tr>
<tr>
<td>SPL_DESC</td>
<td>Split description</td>
</tr>
<tr>
<td><strong>SPR</strong></td>
<td><strong>Split table row</strong></td>
</tr>
<tr>
<td>SPR_DBASPR</td>
<td>Split table row database address</td>
</tr>
<tr>
<td>SPR_DBASPT</td>
<td>Split table database address</td>
</tr>
<tr>
<td>SPR_SPLIT</td>
<td>Split code</td>
</tr>
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<td>SPR_FILENUM</td>
<td>File number</td>
</tr>
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<td>Service code</td>
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<tr>
<td>SPR_SORT_SERVICE</td>
<td>Sort by service flag</td>
</tr>
<tr>
<td>SPR_LOW_ISSREM</td>
<td>Low issues remaining</td>
</tr>
<tr>
<td>SPR_HIGH_ISSREM</td>
<td>High issues remaining</td>
</tr>
<tr>
<td>SPR_SERVED</td>
<td>Issues served</td>
</tr>
<tr>
<td>SPR_TERM</td>
<td>Term</td>
</tr>
<tr>
<td>SPR_GIFTS</td>
<td>Gift subs flag</td>
</tr>
<tr>
<td>SPR_COMPS</td>
<td>Complimentary subs flag</td>
</tr>
<tr>
<td>SPR_PAID</td>
<td>Paid subs flag</td>
</tr>
<tr>
<td>SPR_SUBTYPE</td>
<td>Subscription type flag</td>
</tr>
<tr>
<td>SPR_NEWREN</td>
<td>New/Renewal flag</td>
</tr>
<tr>
<td>SPR_COUNTRY</td>
<td>Foreign country code</td>
</tr>
<tr>
<td>SPR_LOW_ZIP</td>
<td>Low zip code</td>
</tr>
<tr>
<td>SPR_HIGH_ZIP</td>
<td>High zip code</td>
</tr>
<tr>
<td>SPR_TRACK</td>
<td>Tracking code</td>
</tr>
<tr>
<td>SPR_SOURCE</td>
<td>Order source code of the current order</td>
</tr>
<tr>
<td>SPR_BILLSERIES</td>
<td>Billing series</td>
</tr>
<tr>
<td>SPR_RENSERIES</td>
<td>Renewal series</td>
</tr>
<tr>
<td>SPR_SHIPCLASS</td>
<td>Shipping class</td>
</tr>
<tr>
<td>SPR_LOW_COPIES</td>
<td>Low number of copies</td>
</tr>
<tr>
<td>SPR_HIGH_COPIES</td>
<td>High number of copies</td>
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<td>Low random number</td>
</tr>
<tr>
<td>SPR_HIGH_RANDOM</td>
<td>High random number</td>
</tr>
</tbody>
</table>
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QuickFill’s ODBC tables

| SPR_LOW_QUALAGE            | Low qualification age |
| SPR_HIGH_QUALAGE           | High qualification age|
| SPR_SUBCLASS              | Sub class             |
| SPR_REQTYPE               | Request type          |

**SPT**

| SPT_DBASPT                | Split table database address |
| SPT_DESC                  | Split table description    |

**SUB**

| SUB_DBASUB                | Subscription database address |
| SUB_DBACUS                | Customer database address    |
| SUB_DBAPUB                | Publication database address |
| SUB_DBATRK                | Tracking code database address |
| SUB_PUB                   | Publication code             |
| SUB_DATE                  | Subscription date            |
| SUB_STATUSDATE            | Status change date           |
| SUB_CANCELDATE            | Cancel date                  |
| SUB_TOTALAR               | Total amount due in pennies |
| SUB_RENUM                 | Number of renewals           |
| SUB_SERVICE               | Service code                 |
| SUB_TOTALISSREM           | Total issues remaining       |
| SUB_STATUS                | Subscription status          |
| SUB_EXPISS                | Issue number of expiration issue |
| SUB_EXPISSDATE            | Issue date of expiration issue |
| SUB_LASTISS               | Issue number of the last issue served |
| SUB_LASTISSDATE           | Issue date of last issue served |
| SUB_CANCELFLG             | Cancel at expiration flag    |
| SUB_FUT_PREMNEED          | Future order needs premium  |
| SUB_GIFTCOMP              | Gift/Complimentary flag      |
| SUB_TYPE                  | Subscription type            |
| SUB_TRACK                 | Tracking code                |
| SUB_CHANNEL               | Original channel             |
| SUB_LIST                  | List code                    |
| SUB_PLAN                  | Plan code                    |
| SUB_PACKAGE               | Package code                 |
## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Field</th>
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<tbody>
<tr>
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<td>Database address of the current order</td>
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<tr>
<td>SUB_BILL_ORDER</td>
<td>Database address of the billing order</td>
</tr>
<tr>
<td>SUB_LAST_ORDER</td>
<td>Database address of the last order</td>
</tr>
<tr>
<td>SUB_CLASS</td>
<td>Subscription class</td>
</tr>
<tr>
<td>SUB_CNREASON</td>
<td>Cancel reason code</td>
</tr>
<tr>
<td>SUB_REQTYPE</td>
<td>Request type</td>
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<td>SUB_QUANTITY</td>
<td>Number of copies</td>
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### SVC

**Service record**

<table>
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<th>Field</th>
<th>Description</th>
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<tbody>
<tr>
<td>SVC_DBASVC</td>
<td>Service record database address</td>
</tr>
<tr>
<td>SVC_CODE</td>
<td>Service code</td>
</tr>
<tr>
<td>SVC_DESC</td>
<td>Service description</td>
</tr>
<tr>
<td>SVC_NOSHIPPING</td>
<td>Indicates if shipping charges apply to this service code</td>
</tr>
<tr>
<td>SVC_NOTAX</td>
<td>Indicates if tax should not be charged for this service</td>
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</table>

### SVD

**Served table**

<table>
<thead>
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<th>Description</th>
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<td>Served database address</td>
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<tr>
<td>SVD_DBASUB</td>
<td>Subscription database address</td>
</tr>
<tr>
<td>SVD_SUBCLASS</td>
<td>Subscription class</td>
</tr>
<tr>
<td>SVD_REQTYPE</td>
<td>Request type</td>
</tr>
<tr>
<td>SVD_SERVICE</td>
<td>Service code</td>
</tr>
<tr>
<td>SVD_ONREASON</td>
<td>On reason</td>
</tr>
<tr>
<td>SVD_OFFREASON</td>
<td>Off reason</td>
</tr>
<tr>
<td>SVD_CANREASON</td>
<td>Cancel reason</td>
</tr>
<tr>
<td>SVD_DROP</td>
<td>Forced drop flag</td>
</tr>
<tr>
<td>SVD_QUANTITY</td>
<td>Number of copies</td>
</tr>
<tr>
<td>SVD_FIRSTISS</td>
<td>First issue served</td>
</tr>
<tr>
<td>SVD_LASTISS</td>
<td>Last issue served</td>
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### SVN

**Served name table**

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</tr>
<tr>
<td>SVN_DBASVD</td>
<td>Served database address</td>
</tr>
<tr>
<td>SVN_CUSTNUM</td>
<td>Customer number</td>
</tr>
</tbody>
</table>

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*QuickFill*
## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
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<td>SVN_NAME</td>
<td>Full name</td>
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<td>SVN_ZIP</td>
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### Tax Table

<table>
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<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TAX_DBATAIX</td>
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</tr>
<tr>
<td>TAX_SEQ</td>
<td>Sequence number</td>
</tr>
<tr>
<td>TAX_DESC</td>
<td>Tax table description</td>
</tr>
<tr>
<td>TAX_CODE</td>
<td>Jurisdiction code</td>
</tr>
<tr>
<td>TAX_RATE</td>
<td>Tax rate</td>
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### Tracking Code Record

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<th>Description</th>
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<tr>
<td>TRK_DBATRK</td>
<td>Tracking code database address</td>
</tr>
<tr>
<td>TRK_DBAPUB</td>
<td>Publication database address</td>
</tr>
<tr>
<td>TRK_DBAMPK</td>
<td>Marketing package database address</td>
</tr>
<tr>
<td>TRK_DBACHN</td>
<td>Channel database address</td>
</tr>
<tr>
<td>TRK_DBAMPL</td>
<td>Plan database address</td>
</tr>
<tr>
<td>TRK_DBALJS</td>
<td>List database address</td>
</tr>
<tr>
<td>TRK_DBAOFF1</td>
<td>Offer database address 1</td>
</tr>
<tr>
<td>TRK_DBAOFF2</td>
<td>Offer database address 2</td>
</tr>
<tr>
<td>TRK_DBAOFF3</td>
<td>Offer database address 3</td>
</tr>
<tr>
<td>TRK_DBAOFF4</td>
<td>Offer database address 4</td>
</tr>
<tr>
<td>TRK_DBAOFF5</td>
<td>Offer database address 5</td>
</tr>
<tr>
<td>TRK_DBARS</td>
<td>Renewal series database address</td>
</tr>
<tr>
<td>TRK_DBABRS</td>
<td>Billing series database address</td>
</tr>
<tr>
<td>TRK_DBABRSR_GIFT</td>
<td>Renewal series for gift subscriptions database address</td>
</tr>
<tr>
<td>TRK_DBABSR_GIFT</td>
<td>Billing series for gift subscriptions database address</td>
</tr>
<tr>
<td>TRK_PUB</td>
<td>Publication code</td>
</tr>
<tr>
<td>TRK_CODE</td>
<td>Tracking code</td>
</tr>
<tr>
<td>TRK_DATEMAIL</td>
<td>Date mailed</td>
</tr>
<tr>
<td>TRK_EXPIRE</td>
<td>Expiration date</td>
</tr>
<tr>
<td>TRK_QTYREQD</td>
<td>Quantity requested</td>
</tr>
<tr>
<td>TRK_QTYMAI</td>
<td>Quantity mailed</td>
</tr>
<tr>
<td>TRK_CPM</td>
<td>Cost per thousand in pennies</td>
</tr>
</tbody>
</table>
## Appendix F

### QuickFill’s ODBC tables

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TRK_PREPAY_DOLLARS</td>
<td>Prepayment discount in pennies</td>
</tr>
<tr>
<td>TRK_PREPAY_PERCENT</td>
<td>Prepayment discount as a percentage (scaled by 100)</td>
</tr>
<tr>
<td>TRK_DESC</td>
<td>Description</td>
</tr>
<tr>
<td>TRK_TYPE</td>
<td>Gift or complimentary</td>
</tr>
<tr>
<td>TRK_PLAN</td>
<td>Marketing plan code</td>
</tr>
<tr>
<td>TRK_LIST</td>
<td>List code</td>
</tr>
<tr>
<td>TRK_PACKAGE</td>
<td>Package code</td>
</tr>
<tr>
<td>TRK_CHANNEL</td>
<td>Channel code</td>
</tr>
<tr>
<td>TRK_EXPORT</td>
<td>Export tracking code to QFIE web server</td>
</tr>
</tbody>
</table>

### TXR

**Tax jurisdiction ranges record**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>TXR_DBATXR</td>
<td>Tax jurisdiction table database address</td>
</tr>
<tr>
<td>TXR_CNTRYCODE</td>
<td>Country code</td>
</tr>
<tr>
<td>TXR_ZIP_LOW</td>
<td>Low zip or postal code</td>
</tr>
<tr>
<td>TXR_ZIP_HIGH</td>
<td>High zip or postal code</td>
</tr>
<tr>
<td>TXR_JURCODE</td>
<td>Tax jurisdiction code</td>
</tr>
<tr>
<td>TXR_JURDESC</td>
<td>Tax jurisdiction description</td>
</tr>
</tbody>
</table>

### ZON

**Periodical class zone table record**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZON_DBAZON</td>
<td>Periodical class zone table database address</td>
</tr>
<tr>
<td>ZON_SEQ</td>
<td>Sequence number</td>
</tr>
<tr>
<td>ZON_DESC</td>
<td>Zone table description</td>
</tr>
<tr>
<td>ZON_FROMZIP</td>
<td>Low zip</td>
</tr>
<tr>
<td>ZON_TOZIP</td>
<td>High zip</td>
</tr>
<tr>
<td>ZON_NUM</td>
<td>Zone number</td>
</tr>
</tbody>
</table>
Appendix G

QuickFill
Internet Extensions

- Overview
- Internet menu
QuickFill Internet Extensions

Overview
The QuickFill Internet Extensions (QFIE) service allows you to utilize the Internet for accepting new orders and renewals to both audited and non-audited publications as well as allowing your subscribers to perform various subscription related tasks for themselves such as checking the status of their subscriptions, making payments, and changing their addresses.

QFIE consists of two main components. The first is a website that CWC customizes to integrate closely with your corporate website. This QFIE website, which is hosted on CWC’s dedicated servers, includes a database with information exported from your QuickFill database. Your customers can move seamlessly between your corporate website and the QFIE site. Once on the QFIE site they can view their subscriptions and enter transactions in a safe, secure environment as well as gain access to on-line content.

The second component consists of a variety of changes to QuickFill that allows it to export data to the Web, import transactions from the Web and to report on the effectiveness of your Web operations.

Definitions
It is not necessary to enter separate definitions for Web orders. QFIE uses the definitions exported from your QuickFill database to determine the offers that should be displayed for new orders and renewals. If there are certain publications or tracking codes that you do not want available on-line, you can simply uncheck the ‘Export this…to the web server’ field on the publication and tracking code definition screens.

Reporting
Once orders entered via QFIE are imported into your QuickFill database, you can track them using the same reports used to track mail, telephone, and fax orders. When running the new order, renewal, payment, or order reports you can choose to include or exclude Internet orders. You can also run these reports so that only Internet orders are included.
Appendix E

QuickFill Internet Extensions

Internet menu

The ‘Internet’ menu is only visible on your QuickFill main menu if you have purchased QuickFill Internet Extensions (QFIE). It offers the following commands:

Export database
Use this menu item to export a QuickFill database for use with QuickFill Internet Extensions.

Import transactions
Use this menu item to import transactions from a QuickFill Internet Extensions SQL Server database on the Internet to a QuickFill database.

Settings
Use this menu item to specify settings for the QFIE server and for the proxy server (if applicable) you use to access the Internet.

Transfer file maintenance
Use this menu item to transfer or delete zipped QuickFill Internet Extensions SQL Server database files created by the Internet export.

Internet report
Use this menu item to create a report that lists the settings used by QFIE as well as a list of the publications and tracking codes to be exported to the QFIE server when the Internet export is run.

Refer to “Internet (QFIE systems only)” in the table of contents for the built-in help system for more information on any of the above menu items.
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