Tablet & AS400 User Guide

An In Depth Reference Guide to Navigating the Sales Representative's Tablet & Menus

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2/5/20 *ed.*

Signing On

To sign on to Delta's AS400, you must first open and connect to the SonicWall. Next, click the Mocha TN5250 or Display icon on your desktop. To login, you must have a username and password. Your initial username is 'TerrXXX' (replace the XXX with your territory number – if your territory number is 245 then your username is Terr245). The first time you sign onto the AS400 your password will be the same as your username. When you sign on, you will be prompted to change your password. When logging onto Delta's AS400, it can sometimes take up to a minute for the AS400 to respond. This delay is normal and is not a reflection of your internet connection.

Keyboard Functionality

The type of tablet you have and how your keyboard is configured may affect how the AS400 interfaces with your keyboard. The following chart will help with basic navigation in your Sales Rep menus:

F1 – Returns you to the main menu
F2 – Returns you to the previous screen
Tab – Moves the cursor from field to field
Enter – Execute/submit key
Ctrl (left side of keyboard) – the reset key – use this key if the bottom of the screen shows an error message such as 'Function key not allowed' as well as 'X-HELP' at the very bottom. The AS400 is locked at this point until it is reset.

Basic User Tips

Keep in mind your tablet and keyboard charge separately. Both devices have their own unique chargers and charger ports. Remember to charge both regularly.

Data Entry – On any screen where you have entered data (e.g. data sheet or expense report) you must press the Enter key when finished for the data to be saved in Delta's files. If the screen does not respond when you press the Enter key, press the tab key to move the cursor out of the data field it is in and try pressing the Enter key again.

If an 'X' is in the bottom left corner of your screen, the AS400 is working to bring up the screen you requested. Give the AS400 sufficient time to load your information.

The AS400 is not accessible Monday thru Thursday from 11:45 p.m. to 2:00 a.m., and Friday from 11:45 p.m. to Saturday 12:00 p.m. CST. These times are restricted in order to perform file backups and maintenance.

Should you have any questions please contact Donnie Crook at 901.375.3618 or dcrook@deltaforemost.com.

The AS400 and The Sales Rep Main Menu

Customer Inquiry by Name - Option 1

Customer Inquiry by City State - Option 2

Customer Inquiry by Zip Code - Option 3

Options 1 through 3 are your primary ways to maintain and view data on the customers in your territory. Upon selecting one of these options (1, 2 or 3) a screen will display for you to enter your search. *e.g. if you are looking for one of your Outback locations, key in the first part of your customer's name (Out) to begin the search.* Once you find the customer you are looking for, type a "1" beside the customer and press enter.

This screen (screen 2) is the main inquiry / data entry portal for each of your customers. From this screen you will be able to view and maintain your customer data sheets, complaint reports, price deviation sheets, view all invoices and open orders, open items and comments.

Account Data Sheets
The top left section of screen 2 is customer data maintained by the home office. The top right section is the account buyer data, which you maintain. The middle section is made up of the following data provided by both the home office and yourself:

Send Premium to – for you to deliver, mail to a customer, etc.
Credit Limit – open credit, Turned over, 1 order at a time, etc.
Date Last Sold – last invoice date
Date Last Called and Follow Up Date - comes from the Account Date Sheet option 'F3' below
PO# - are PO's required (Yes or No)
Account Balance – amount customer owes Delta
Best Day to Call On & Time – for your reference

The following sections correspond to input and viewing options. These options are accessed by using the 'F' keyboard menu displayed on your tablet's screen from the "keys" button.

Data Sheet Entry – F3

Date Last Called – key date as MMDDYY no spaces or hyphens – you must fill in this field each time you call on a customer in order for them to show on your daily report
Follow Up Date – This is to be used as a follow up prompt
Comments - input your comments about the customer
Demos - Key product # for all products demonstrated
Products Sold - Key product # and dollar amount (no decimals) *e.g. 75250 for 752.50 and ship date for each product sold*
Personal Data - Use the *'F4" key* from this screen to enter personal information on the buyer or information on the company
Note: All information on this screen above will be shown on your daily report

Complaint Report Entry – F4
Use this option to enter complaint reports or to view old complaint reports. Once submitted, reports will automatically be sent to the home office.

Price Deviation Sheets – F5

Use this option to enter price deviations or to view old deviation requests. Deviations will automatically be sent to the home office.

Data Sheet Inquiry – F6

This inquiry shows the 'account data' on your customer. The information on this inquiry is the information you entered in the 'Data Sheet Entry (F3) section above. When you first select the 'F6' key you will be shown the information on your buyer and the company data. Press enter key to view your comments on the customer. Press enter key again to view past demos and products sold. Press the F2 key again to return to the Customer Inquiry Menu.

Customer Open Items Inquiry – F7

This inquiry displays the dollar amount the customer owes Delta and the invoices that make up this amount. All comments the credit department has made regarding these invoices are also displayed.

Invoice Inquiry – F8

This inquiry displays a list of all of your customer's invoices. Select any invoice to display the detail of the invoice. (More than one invoice may be selected at a time). If there are more products on the invoice than the screen displays, press the F3 key to view additional products. To view the **commissions** on the invoice, press 'F4' while the invoice detail is displayed. *See the commissions section later on in the guide.*

Open Orders – F9

This inquiry displays all orders the home office has entered for this customer, which have not yet been invoiced. Select the order to view the order details.

Calculate Freight – F10

Use this inquiry to determine the amount of freight Delta will charge this customer to ship an order (truck line shipments only). The leading number of a 5 digit product number denotes the product type: 1 – for liquids, powder products and equipment. 2 – for aerosols. 8 – for most F numbers. 5 – for the other F number products.

The actual product number is in the next 4 digits (if the product number is less than 4 digits you must use '0's to fill in the product number). e.g. FM 4024-ES is entered as 14024, FM 651-ES is entered as 10651, FM 32 is entered as 10032, FM 2153-ES (aerosol) is entered as 22153.

After entering the product number, press the enter key to input the quantity ordered (e.g. 1, then tab) and selling price (enter selling price with 4 decimals, e.g.: enter $23.65 as '236500') beside the product description and size being ordered. Enter to view the total merchandise value, freight, and taxes the customer will be charged. If you have more than one product on the order, press the enter key once the merchandise value, freight, and taxes are shown to add additional products. Repeat this process until all products are entered.

View Telesales Comments – F12

This inquiry displays telesales comments if our telesales department has called on this customer.

Potential New Customer - Option 4

This option allows you to create and maintain data sheets on potential new customers. There are a few different menus to interact with potential customers:

Create Potential Customer - Use this option to setup a potential new customer. You will need to fill in both the customer data and the buyer data. The only 'F' key function is the F3 key, which allows you to enter the data sheet information. This information will be transferred to your daily report.
Search Options for Potential Customers – Search by name, city, or zip code to view established potential customers.
Move Potential Customer to Customer Files – Use this screen when you make a sale to a potential customer. Once the sale has been shipped select the potential customer and press enter. A new search screen will appear. This is an alpha search of existing customers. Locate and select your new customer and press enter. This will move all of your data sheet information to the existing customer file and remove the record from the potential customer file.

Active / Inactive Customers - Option 5

This option is for sales reps that share a geographical area with another sales rep. There are 3 different searches: Name, Zip Code, and City, State. Any customer which is active or protected will have a '*' in front of their name, meaning you will not be able to view any detailed information on this customer. Any inactive or unprotected customer will have a '_' in front of their name, meaning you may select the customer in order to view or make data sheet entries.

Customer By Volume - Option 6

This menu is great for viewing your customers, sorted by volume in descending order. It also allows you to compare the amount of business you have gotten this year compared to the last two years.

Customers Buying Selected Product - Option 7

Use this option to locate all your customers buying any selected product with a given date range. To use this inquiry, first enter the product number then the date range you are looking for (MMDDYY). All product numbers in the computer are in the following 5 digit format: the leading number of a 5 digit product number denotes the product type: 1 – for liquids, powder products and equipment. 2 – for aerosols. 8 – for most F numbers. 5 – for the other F number products. The actual product number is in the next 4 digits (if the product number is less than 4 digits you must use '0's to fill in the product number). e.g. FM 4024-ES is entered as 14024, FM 651-ES is entered as 10651, FM 32 is entered as 10032, FM 2153-ES (aerosol) is entered as 22153.

Customer Ship-To By National Account - Option 8

This menu shows all national accounts both active/inactive currently in our system. This is an extremely valuable tool if you are trying to open a new location in your territory and want to view the other locations who are buying. You can search by letter or simply type 'A' to view the whole list. Active national accounts are denoted by a different color, and the words 'no credit needed' on the right hand side. Additionally, relevant info on buying (e.g. 7 digit PO) is listed by the name. If you press F5 on a specific national account, you can view the amount of company wide business with them over the last 3 years. *Type a 1 by any national account to see all of its invoices in chronological, descending order.*

Customer Inquiry By Last Bought Date - Option 9

This menu shows you which customers purchased from you in a specific date range. Type start and finish dates (MMDDYY) then press enter.

Customer Call Inquiry - Option 10

This menu allows you to follow how often you are calling on your top accounts. Accounts are organized by volume in descending order for the past year. It also shows the last contact date and the frequency you called on them in the year based on a data sheet/daily report entry in the AS400. The program only pulls from data in the AS400, so any hand written reports will not show up. *Type a 1 by an individual account to see notes from a specific call.*

Sales Charge Inquiry - Option 11

This menu catalogs your sales charges for a given date range. Note, on the top right of the menu the total sales charge is listed with the actual cost to you underneath.   *Type a start and end date (MMDDYY) then press enter.*

Order Inquiry - Option 12

This option displays the total value of shipments for the month, total premium items given away, as well as a list of all orders entered by the home office which have not been shipped. Select any order to view the order detail.

Shipment Inquiry - Option 13

This inquiry will show a list of all invoices shipped within a given date range. Enter dates using the MMDDYY format to see invoices shipped within the specified period. To view the invoice detail, enter a "1" by the invoice and select it. To view your commissions for that invoice, press 'F4' while the invoice detail is displayed.

Commissions (Within Shipment Inquiry, Option 13)

Learning to view your commissions and invoices on the AS400 is a necessity for tracking your monthly progress, especially because paper invoices and weekly commission statements are no longer being mailed. To view your monthly commissions, go to the shipment inquiry menu and enter a specific date range. *To view where you are currently at in a month, type the first day of the month and today's date. View your shipments and commissions in the top right corner of the menu. To view a detailed commission breakdown on an invoice, type a "1" by it and press enter. Now that you are viewing the invoice, press F4 to view the commission detail. This is the same display printed on the commission statements.*

Past Due Accounts Inquiry - Option 14

This menu allows you to view any sales that are delinquent. Since our terms are Net 30, any open invoice past 30 days will show even if the account regularly pays on a longer schedule. The account name, amount of invoice, days the invoice has been open, and contest points associated with the order are shown. *Enter a "1" by an account to view its account data sheet.*

Rep Prod Sales vs Company Avg. - Option 15

This menu lists Delta's products in order from the highest average volume per rep for the last year. Your average sales are shown in the first column, followed by the company average, followed by the difference between the two. The menu updates monthly and is a great way to see if you are getting your share of the top selling products.

Account Follow Up Inquiry - Option 16

The account follow up inquiry is a ticker file for you to know which customers you need to follow up on. The key for this file to work properly is for you to key in a follow up date from the data sheet entry screen (F3 from the main inquiry / data entry portal). Upon selecting this option you will be asked to enter a follow up date (MMDDYY). All accounts with a follow up date in the data sheet file with this date or older will be displayed. Select any of these accounts to go to the main inquiry / data entry portal for that customer.

Daily Pre-Plan Menu - Option 17

The Daily Pre-Plan programs will allow you to select and print customers you plan to call on. This option gives you 5 different sorts to select your accounts. To select an account, locate it in one of these searches and select it. In addition to these searches, you may select an account from the main inquiry / data entry portal (enter a 'Y' in the Add to Pre-Plan field in the top right section of this screen). Once you have selected the customers you wish to show on the Pre-Plan printout, select option 6 Display Pre-Plan Report. This screen will show you all the accounts you have selected. Use the field to the left of the customer name to determine the order the customer data will print on the Pre-Plan Report. If at this point you wish to add another customer, go back to one of the sorts and select an additional customer.

Submit Daily/Expense Report - Option 18

This option will submit both your daily report and expense report to the home office. Once you select this option you will be asked the date the report is for, the week rotation number, time started and stopped, and beginning to ending mileage. It is important to enter your mileage information accurately for tax purposes. Press the Enter key and you will see a recap of your daily report. To complete your expense report press the F9 key from this second screen. Your mileage is prefigured from the information you just provided. Fill in the gross amount for meals, entertainment, and any other item you may have for the day. Note that the 'entertainment' and 'other' fields also have description fields. Press the enter key once to see the edited amounts, press it again to see the extended amounts, press it a third time to return to the daily report screen. Then press the F12 key to submit both your daily report and expense report to the home office.

Daily Report Inquiry - Option 20

The daily report inquiry displays a summary of your daily reports by day. Select any report to view the report detail.

Expense Report Inquiry - Option 21

The expense report inquiry displays your expenses for the month by week. Select any month to display the weekly summary by day. Select any week to display the daily detail.

Product Inquiry - Option 26

This inquiry displays all sizes and book pricing for all of Delta's listed products. All product numbers in the computer are in the following 5 digit format: the leading number of a 5 digit product number denotes the product type: 1 – for liquids, powder products and equipment. 2 – for aerosols. 8 – for most F numbers. 5 – for the other F number products. The actual product number is in the next 4 digits (if the product number is less than 4 digits you must use '0's to fill in the product number). e.g. FM 4024-ES is entered as 14024, FM 651-ES is entered as 10651, FM 32 is entered as 10032, FM 2153-ES (aerosol) is entered as 22153. *Select any size product to view the multi-drum pricing and GSA pricing.*

Sample Inquiry - Option 27

This menu shows which customers you have given merchandise to at no charge. The customer, city, date of invoice, and no charge merchandise that was given. It is a great way to check on which accounts you gave a sample to and when to follow up and sell them! *You can view the specific invoice with a 1, the customer's account data with a 2 (if you want to read notes for example), and when you have taken care of that sample, a 'D' to remove it.*

Contest Points Inquiry - Option 28

A very important feature to view where you stand with contest points and walk thru's. *After entering the menu, select the contest you wish to view, type a '1' by it then press enter. From there your point summary will be broken down, press F7 for a detailed list.* This shows all your invoices that qualified for points. The first column 'Rep Points' is what you turned in on your slip. The second column 'Actual Points' is after they have been checked by the computer. The third column 'Walk Thru' is very important to keep an eye on. If the column says 'N/A' that indicates the qualifying product sold was a non-walk thru item. If it shows '8.00' this indicates the walk thru has been submitted to the office, it has been counted and you received the 8 additional contest points for it. If the column displays a date, this denotes the office has **not** received the walk thru yet and the date listed is the due date it must be received in the office by. If that date has passed and is still listed, the points were lost.

Freight & Sales Tax-New Customer - Option 29

Use this inquiry ONLY if you are calculating freight for a new customer. Freight and tax rates are more accurate in the option F10 menu from an account data sheet (*see data sheet entry above*). When you select this option you will be asked to provide City and State (needed to figure sales tax) and the zip code (needed from freight charges). After entering this information you will be asked for the product number of the item being shipped. *See the data sheet entry, Calculating Freight section above.*