SalesMate™ 7.4

TechMate International

Technology for the Moving Industry

Operator's Manual

December 2001

Preface

TechMate International is dedicated to the Moving Industry and is committed to be your technology partner (or Mate). **SalesMate** is one of the products in the **TechMate** family. **SalesMate 7.4** is a truly international product that can used for local, intrastate, office & industrial, interstate and international surveys and for rating with supported tariffs.

Following is a list of some of the significant features of SalesMate 7.4:

- SalesMate 7.4 operates with ***FirstMate V2.1***. ***FirstMate*** is a 32 bit Windows product offered by TechMate with a full interface for interchanging data with SalesMate. ***FirstMate can assume many of the setup functions*** formally done within SalesMate (e.g. entering Agency names, entering container rates and replacement valuation rates). Go to Section 2.0 for details. ***With either the Basic or Professional Editions of FirstMate, you can move customer data between SalesMate and FirstMate***.

- SalesMate 7.4 supports rating with the ability to fully customize tariffs for your needs.

- SalesMate 7.4 is multi-lingual. ***Languages currently available are English, French, German, Italian, Portuguese and Spanish***.

- SalesMate 7.4 supports modes of transport (e.g. Road, Sea, Storage, Air, Local) allowing you to do a room by room survey for each mode of transport.

- You can scan or key in Comments or Contents for Articles and Cartons. With this feature you could show an Article that needs "Special Care" or show two medium sized cartons with dishes and three medium cartons with kitchenware in the same room.

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1.0 INTRODUCTION

SalesMate™ is a powerful yet easy to use portable survey and estimating system designed specifically for the household goods moving salesperson. It's ability to quickly and accurately capture a comprehensive multi-modal survey, immediately rate the volume (size and weight) of the shipment and then print a professional survey report will give you a competitive edge and can significantly increase your close-ratio. The system allows you to indicate articles that are not going to eliminate disputes on moving day.

The survey is taken using a small hand held TELXON® (pronounced "tells on") PTC-600 computer and a bar coded household goods survey template. The salesperson simply scans the mode of transport, then rooms followed by scanning all the articles in each room. A single scan is all that is needed to change from one mode of transport to another or from one room to another. SalesMate then produces a detailed room by room survey for each mode of transport that can be printed at residence on a portable printer or back in your office. With SalesMate's multi-language ability, you can print the survey report in any of the supported languages. SalesMate allows you to customize the inventory by defining rooms or areas and articles not found on the template. The inventory can be further customized by showing the contents of cartons or putting comments on articles.

An Office & Industrial extended inventory option is available with SalesMate (contact TechMate International for details).

SalesMate can be configured to provide full rating capabilities for supported tariffs. For US domestic users with rating, supported tariffs are the HGB ICC 400-N, ICC 400-M, ICC 400-L, ICC 400-J, Allied's TPG, North American's Zip2Zip, Mayflower's APP1, and generic Intrastate and Local Tariffs. Each tariff can be edited and customized for your operation.

With SalesMate all manual calculations needed to calculate the volume or weight of the survey are eliminated. SalesMate's multi-lingual ability eliminates the need for translations back in your office. These time savings coupled with the production of a computer generated state-of-the-art household goods survey will result in a higher close ratio. SalesMate will pay for itself in short order.

1.1 GETTING STARTED

If you are a first time user, you should read and following the directions in the shaded boxes.

> These are designed as training aids and if performed, should be sufficient to get you ready to start using SalesMate in your business.

1.2 KEYPAD OVERVIEW

The keys located at the corners of the keypad and the blue keys are the main keys used to move within SalesMate. *Each key's function is described either by the letter or number on the key itself or by the description directly <u>above</u> the key*.

The TELXON PTC computer is turned ON and OFF with the **[ON/OFF]** key (the upper left key on the keypad). If the unit is ON and left unattended or unused for 2 minutes it will turn itself OFF to conserve its batteries. When turned ON, the computer will return to where it was (note that if you are entering data (e.g. a name) when the computer turns off, any partially entered data will be cleared).

The upper right key is the **[END]** key. It is used to end what you are doing. If you press the [END] key repeatedly you will always return to the home position (see **WHERE AM I ?** or **SalesMate Menu**).

The **[SETUP]** key is active when you are at a SalesMate Menu and will transfer you into Setup (you must have a least one Customer in SalesMate to enter Setup).

The middle blue key on the left is the **[SHIFT]** key. It is used to shift from one mode of transport to another at the SalesMate Menu and when doing the Survey. It is also used during data entry to shift the keypad between letters and numbers.

The middle blue key on the right is the **[CLEAR]** key. It is used to initiate entry or re-entry of data (e.g. enter a new Customer) when appropriate. Think of it as clearing out a field for entry of new data.

The two blue keys below [CLEAR] are the **[BACKSPACE]** (or !) and **[FORWARD]** (or !) keys. These two keys are used to move backward or forward through choices.

The big red key at the bottom right is the **[ENTER]** or **[YES]** key. It is used to complete data entry, enter a function or to answer YES to a Question (e.g. EDIT Dates?).

The **[SP]** key at the bottom left is used as the **[NO]** key (in repines to questions) or enter a space or "-" when entering.

The keys labeled "Symbol" and "Loc" are not used by SalesMate (they are used by LoadMate & TrakMate).
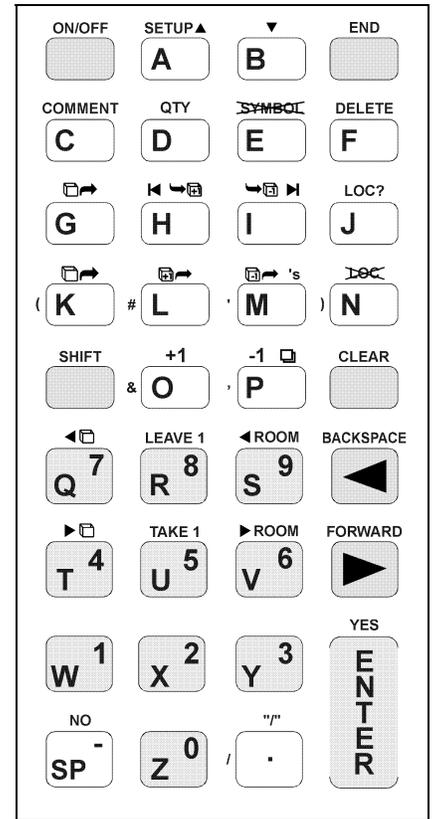
1.3 WHERE AM I ?

SalesMate uses the top and bottom lines of the display to tell you where you are and what you are doing.

The home position is the **SalesMate Menu**. This is where customers are entered, deleted and selected. It's easy for the first time user to get lost in the system. *No matter where you are, pressing the [END] key will eventually return you to the SalesMate Menu*. Note the top line on the following display:

```
-SalesMate Menu-
->JOHNSON      25
             374.2f³
    TOTAL  2619 #
```

If there are no Customers, SalesMate will remain at the prompt for a new Customer (as shown below). *You must have at least one Customer entered in order to move from this prompt (this includes entering SETUP).*

```
^SalesMate Menu-
-> _____
   New  Customer
```

Refer to the **SalesMate Menu** section for additional details on what you can do at the SalesMate Menu.

Turn your Computer ON at this time. If you are not at one of the two prompts above (the Customer name and numbers will vary) press [END] until you are at one of the two prompts above. If you are at the first prompt, press [CLEAR] and you will be at the prompt for a **New Customer**.

At the **New Customer** prompt, type smith followed by [ENTER] to complete the entry. You have just entered a new customer and the display should look like the example that follows. If so continue reading, if not repeat this section.

When a customer is entered or selected from the SalesMate Menu, that customer becomes active and you will move to the Customer Active Menu (you will always start at the option of editing dates for the active Customer.
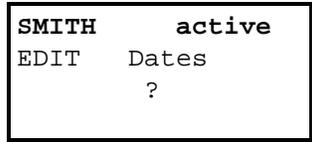
```
SMITH      active
EDIT   Dates
         ?
```

Refer to the **Customer active** section for additional details on what you can do when a Customer is active.

1.4 CONTRAST CONTROL

The a and b keys are used to control the **CONTRAST** of the TELXON PTC-600's display *while you are in SETUP*. Each time a or b is pressed while you are in SETUP, the screen contrast is increased or decreased making the background and characters lighter or darker.

There is one exception to the use of the a and b keys when you are in Setup. At the prompt showing the use of lb/ft3 or Kg/m³ they are used to change the unit of measure used by SalesMate for display.

If you have not already done so, we recommend that you go into SETUP and use the a and b keys to adjust the contrast for best viewing.

Press [SETUP] (the a key) to enter SETUP. Now press the a key and see what happens. The display should get darker and darker and then get light. Press the b key and the screen will get lighter. Continue with the a and b keys until the contrast in comfortable for your viewing. Press [END] when you are done to exit SETUP.

1.5 DATA ENTRY using KEYPAD

Since the keypad has a limited number of keys, some keys are used for either letters or numbers and special characters. The [SHIFT] key is similar to Caps Lock on a typewriter and is used to control if keys are being used for letters or for numbers. Special symbols such as parentheses, comma, pound sign, etc. are grouped with numbers and will be generically called Numbers in the remainder of this manual. Most of the special characters are in the margin just to the left of the key (e.g. just to the left of the l key is the special symbol "#"). The space, [SP] in the bottom left corner, and the period are considered Letters. An "^" will be displayed in the top left corner of the display if the keypad is used for Letters. If the top left character of the display is not "^", the keypad is being used for entry of Numbers. Again, [SHIFT] is used to switch the keypad between Letters and Numbers. SalesMate will automatically set for Letters or Numbers at the start of data entry for each field (e.g. Letters for names, Numbers for phone numbers) in order to minimize your need to use the [SHIFT] key.

If you make a mistake during data entry, the ! key will backspace and erase the last entered character or you can use the [CLEAR] key to clear the entire field and start over. ***Data entry of a field is completed when either the field is filled or the [ENTER] key is pressed***.

Use of the ! ***key during data entry is not recommended as the location of the cursor is not highlighted***. If the current entry cursor is at the end of entered data, the ! key will move the entry cursor to the first character and then the ! key will move the entry cursor forward one character position and entered characters can be overwritten. ***If you lose track of where the entry cursor is, press [CLEAR] to start over***.
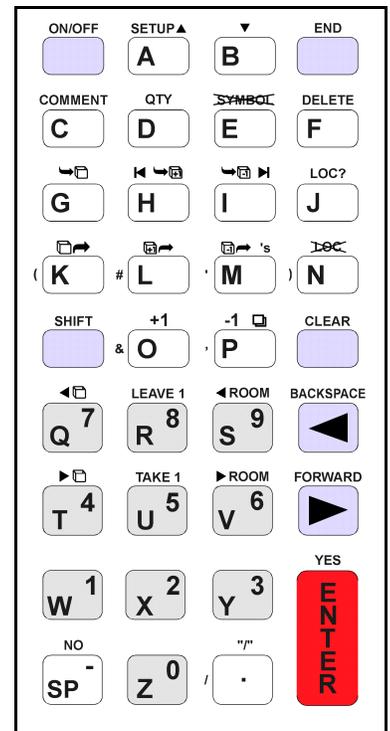
Turn the Computer ON (if necessary) and you should have **SMITH   active** displayed on the top line (if not, repeat the training exercise in Section 1.3). Press the ! key until you advance to EDIT Shipper as shown below.

```
SMITH     active
EDIT   Shipper
         ?
```

This is a question (do you want to edit the Shipper?). Press [YES] (the big red key) to start editing the Shipper. The first prompt is for the Shipper's first name.

```
^MITH     active
NAME >_____
first name
---Shipper    ---
```

Note the "^" in the upper left corner indicating entry of Letters. Now enter j oe and the display should appear as follows.

```
^MITH      active
NAME >JOE_____
first name
---Shipper    ---
```

If it does, press [ENTER] to complete entry of the first name (if not, press [CLEAR] and try again). You are now being prompted for the Shipper's last name on the third line of the display.

```
^MITH      active
NAME >JOE
_____
---Shipper    ---
```

Enter smi th as a last name and press [ENTER] to complete the entry. You will advance to a prompt for street address "Addr1>". Remember, if you let the computer time out (turn itself off) before you press [ENTER], partial data you have entered will be cleared.

SalesMate will automatically set the keypad to Letters for data fields where it logically makes sense (e.g. Shipper's name) or to Numbers for data fields that normally start with numbers (e.g. Addresses).

Now let's enter the street address "427 MAIN ST. #2". Since most addresses start with numbers, the initial data entry screen is set for numbers (notice the lack of the "^" character in the top left corner of the display).

```
SMITH     active
Addr1>_____
_____
---Shipper    ---
```

1. Press 427:

```
SMITH      active
Addr1>427_____
_____
---Shipper    ---
```

2. Press the [SHIFT] key. This will switch the keypad to Letters in preparation for entering a space [SP] and then the street's name. Note that the left character changed to "^" to indicate letters:

```
^MITH      active
Addr1>427_____
_____
--- Shipper   ---
```

3. Press [SP] (bottom left key) followed by main [SP] st. [SP] (if you make a mistake, you can use the ! key to backspace and erase one character at a time or the [CLEAR] key to clear the entire field and start over at step 1. Note that even though the field for the address wraps from one line to the next, the address will print as one line on reports. You should have the following:

```
^MITH      active
Addr1>427 MAIN S
T. _____
---Shipper    ---
```

4. Press the [SHIFT] key to switch back to numbers in preparation for entering #2. Then enter "#" using the | key and then 2. The display should be as follows:

```
SMITH      active
Addr1>427 MAIN ST.
#2_____
--- Shipper   ---
```

5. Press [ENTER] to compete the entry and SalesMate will advance to the next field. To review Address 1, press the ! key (notice that there are no underscores). If an error was made, you can press [CLEAR] and reenter the address.

```
SMITH      active
Addr1>427 MAIN ST.
#2
---Shipper    ---
```

6. Let's assume we are done editing the Shipper. Press [END] to end editing the Shipper and you will return to the **SMITH active** menu and advance to EDIT Consignee.

1.6 BAR CODE SCANNING

With proper technique, the success rate of reading bar code will be close to 100%. Place the template on a firm surface (e.g. clipboard). To scan a bar code, the bar code scanner (visible red light) is scanned horizontally through the bar code. The scanner is a contact scanner so the tip of the wand should be in light contact with the bar code. For best results, the scanner should be near perpendicular with the template. ***Do not press hard*** as this may eventually damage the template.

If you are a first time user and unfamiliar with reading bar code with a contact scanner, read the next section "BAR CODE SCANNING, PRACTICE" carefully and practice until scans are successful at least 8 out of 10 times.

Note that with a contact scanner you must move the scanner across the bar code and the bar code is read by the scanner sensing the amount of reflected light during the scan. The scanner needs to sense the start and end of the bar code so it is necessary to scan blank space both before and after the bar code. When moving the scanner across the bar code, faster is usually better. Bar codes may be scanned in either direction.

The bar code scanner can be mounted for either left or right handed operation. For right handed operation, the tip of the bar code scanner should point to the left. For left handed operation, the tip should point to the right.

1.6.1 BAR CODE SCANNING, PRACTICE

Turn the Computer ON (if necessary). You should have **SMITH active** on the top line of your display. If you are, skip to the next paragraph. If you are not, press the [END] key until you return to the SalesMate Menu. Then, locate Customer SMITH (using the ! and ! keys if necessary) and activate it by pressing the [ENTER] key (if a customer named SMITH has not been entered, press [CLEAR] and enter the customer SMITH. Customer SMITH will then be active.

Press ! until you get to **EDIT Survey** as follows:

```
SMITH     active
EDIT   Survey
        ?
```

Press the [ENTER] key to start editing the Survey (this will turn the bar code scanner on). Now try scanning one of the Mode bar codes at the top of the bar coded template and then try scanning the Room bar codes. Once you have mastered the room bar codes, try scanning some articles.

Start the scan by placing the tip of the scanner in light contact with the template so the red beam is approximately 1/2 inch to either side of the bar code (in the circle below) and then move the beam through the bar code **at a fast constant speed**, making sure to continue at least 1/4 inch beyond the bar code.

If you practice with the bar codes shown below, you will get an ALARM after every successful scan of the bar code but nothing will register on your display.

← ▮▮▮ ← (Start here) → ▮▮▮ →

Scan in either direction

To develop a rhythm, count 1 as you place the scanner in light contact with the template (allows time for the scanner to wake up) and then count 2 as you scan across the bar code. Each count should be approximately 1/4 second (a rapid scan will produce better results than a slow scan). You will hear a beep if the bar code is read successfully.

When you are done practicing, press [END] and then ! to return to the prompt to **EDIT Survey**. Then press [DELETE] and you should get the prompt "DELETE Inventory ARE YOU SURE?". Answer [YES] and read on (you have just deleted the practice Inventory).

1.7 AVAILABLE MEMORY

Available memory is displayed on the bottom line of the display when you enter SETUP. The amount of memory required for a customer is approximately 2500 bytes. When available memory is low, you need to delete customers in order to free up memory (refer to **DELETE CUSTOMERS**).

1.7.1 LOW MEMORY WARNING

When the amount of available memory is too low or is insufficient to perform an operation, the warning message **MEMORY IS LOW DELETE CUSTOMERS** will be displayed for a few seconds. You should proceed directly to the **SalesMate Menu** and look for customers to delete to free up memory.

1.8 LOW POWER/BATTERIES

Your TELXON computer operates with three (3) standard AA batteries. You should get approximately 30 hours of operation from alkaline batteries. If your batteries are low, the computer gives a **LOW POWER** warning and will turn itself off. *You should change batteries before you continue using SalesMate.* If the batteries are very low the Computer may not operate at all. *It is recommended that a spare set of alkaline batteries be kept on hand in case the batteries run low*.

If you are using rechargeable batteries, refer to the Guide to Maintaining NiCd Batteries manual for details on charging and changing batteries.

CAUTION: *Please note that TELXON PTC-600 memory is protected for only 15-20 minutes once batteries are removed. Leaving the TELXON PTC-600 without batteries will result in the loss of all Customers and Setup!*

It is possible for the computer to "***hang up***" if operated or stored with low batteries. *If this happens refer to Section 9.8 and carefully follow the steps for getting to the unit's system prompt and restarting SalesMate*.

2.0 SETUP – OVERVIEW

If you are using SalesMate with rating, FirstMate is required for the Setup of Container Rates and Replacement Valuation Rates when not included in a tariff. In addition, *Carriers and Agents can be entered in FirstMate and downloaded to SalesMate*.

In addition to the above, new releases of SalesMate, Languages, Printer Drivers and Tariffs are downloaded to *SalesMate* from *FirstMate*. Once the proper files are downloaded to *SalesMate*, you should proceed to SalesMate's SETUP.

2.1 SETUP IN SALESMATE

SETUP is used to select (or enter) Carrier(s), select (or enter) Agents (both for use as Origin and Destination Agents), initialize and customize tariffs for rating and to set default system parameters (e.g. the type of printer being used).

SETUP is entered from the SalesMate Menu or from the Customer active Menu by pressing [SETUP] (the ⱥ key). If you enter Setup from the SalesMate Menu, you will be at the following prompt (asking if you want to download files from FirstMate):

```
-SalesMate V7.4-
   Setup from
   FirstMate?
-Setup   98,156-
```

If Setup is entered from the Customer active Menu by pressing [SETUP], you will enter Setup the Carrier selection prompt or at the Printer selection prompt if you are an a print selection (e.g. Print Survey?). Following is the Carrier selection display:

```
-SalesMate V7.4-
Carrier   ? SCAC
ABC VAN LINES
-Setup   98,156-
```

> Press [SETUP] to enter Setup. If you do not enter Setup, press [END] until you return to one of the Customer active or SalesMate Menu displays and then press [SETUP].
>
> You should be at the display shown above. If the Carrier is not correct, press [NO] until your Carrier is displayed. If you do not use a Carrier, press [NO] until "----" is displayed as the key (where SCAC is in the example shown above).

Following is a summary of the SETUP parameters. If your system does not support languages or rating, some of the following parameters may be absent.

- *Setup from FirstMate ?*
- Carrier ?
- Agent ?
- Language, Metric/English & Factor
- Edit Tariffs ?   (with Rating option)
- Add to Unpacking (with Rating option)
- Printer
- Edit Articles (user defined)
- Speaker (ON or OFF)
- Salesman Code
- Paper Size (Letter, A4 or Legal) & Top Margin
- Bottom Margin & Margins on 1st page or all pages

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From within SETUP, pressing [END] will eventually return you to where you where before you entered SETUP.

The ! and ! keys are used to scroll forward and backward through the SETUP menu items.

Pressing [YES] when at the "Setup from FirstMate" display will actually exit SalesMate and give you a chance to "Download Files from FirstMate", re-start SalesMate or return the the Telxon's system prompt. To return to the system prompt, press [END] at the display "Download Files from FirstMate" and then press [YES].

Parameters that have values (e.g. FACTOR and SALESMAN'S CODE) are set or changed by simply keying in the desired value. Parameters with choices (Carrier ?, Agent ?, Add to Unpacking, PRINTER, SPEAKER VOLUME and Baud rate) are changed by pressing [NO] until the desired choice is displayed.

The CARRIER, AGENT and ARTICLES parameters have additional choices. As stated above, the current selection is shown on the display and [NO] is used to change to another Carrier (or no Carrier) or the Agent to be used as the default Origin Agent. [CLEAR] is used in initiate entry of another Carrier of Agent. If you want to review or edit the parameters for the Carrier, Origin Agent or ARTICLES, press [ENTER]. Go to **CARRIER SETUP**, **AGENT SETUP** or **EDIT ARTICLES** for details.

The initiation and editing of tariffs is entered by pressing [YES] at the **Edit Tariffs** prompt. Go to **EDIT TARIFF** for details.

> If your Carrier(s) were already entered proceed directly to Agent Setup (Section 2.2). Turn your Computer ON. If your Carrier(s) are not found, you will need to add your own Carrier. Read CARRIER SETUP and enter additional Carrier(s).

If you do not want to use a Carrier, leave the display for Carrier as follows (if a Carrier is set, press [NO] until you have the following display).

```
-SalesMate V7.4-
Carrier   ? ----


-Setup    98,156-
```

2.2 CARRIER SETUP

Carriers are identified by their SCAC code (a four character code. ***If you are using SalesMate for U.S. interstate rating, you must use the Carrier's SCAC code or your carrier's exceptions will not be used***. If you are using SalesMate to rate U.S. iterstate moves, the Carrier's Id must match the file name of the Replacement Valuation file. Carriers are displayed as follows:

```
-SalesMate V7.4-
Carrier   ? ALLV
Allied Van Lines
-Setup    98,156-
```

To change the Carrier, press [NO] and you will advance to the next available Carrier and then to no Carrier (indicated by "----").

To review the name, address, etc. of a Carrier, Press the [YES] key at the **Carrier ?** prompt. Following is a summary of the fields for a Carrier.

- NAME
- Address 1
- Address 2
- City

- State
- Postal Code
- Country
- Telephone
- Telephone 2

To add a Carrier press [CLEAR] at the **Carrier ?** prompt. You will be prompted for the SCAC code for the **NEW CARRIER** as follows:

```
-SalesMate V7.4-
Carrier   ? ____
   New Carrier
-Setup   98,156-
```

After keying in the Carrier's code (SCAC for U.S. Carriers), you will be prompted for the Carrier's name, etc.

Although Carriers can be entered in SalesMate, it is recommended that you enter your Carrier in FirstMate and download the Carrier file to SalesMate.

2.3 AGENT SETUP

Agents are identified by an 8 character Agent Code. Agents that are downloaded from FirstMate or entered in SalesMate's SETUP can be used for Origin and Destination Agents for individual Customers. ***The Agent that is currently selected will be set as the Origin Agent for a Customer at the time the Customer is created***. If is recommended that your Agency be entered in FirstMate and downloaded to SalesMate.

An Agent's name, address and telephone number can be reviewed and changed (if necessary) at any time. Press [YES] at the **Agent ?** prompt and you can then review the fields (with the ! and !   keys) and change any of them by pressing [CLEAR].

- NAME
- Address 1
- Address 2
- City
- State
- Postal Code
- Country
- Telephone
- Telephone 2

Multiple Agents can be defined. To add an Agent, press [CLEAR] at the **Agent ?** prompt.

```
-SalesMate V7.4-
Agent ? _____
   New Agent
-Setup   98,454-
```

To set the Agent to be used as the default Origin, press the [NO] key at the **Agent ?** prompt until your Agency is displayed.

You can delete an Agent by pressing the [DELETE] key at the **Agent ?** prompt.

2.4 LANGUAGE, METRIC/ENGLISH & FACTOR

SalesMate supports multiple languages. If more than one language has been installed, the language used for display can be changed by pressing the [NO] key at the Setup prompt shown below.

SalesMate also allows display of sizes and weights in Metric or British units. When ⱥ (the Setup key) is pressed at the prompt shown below, it will first change the unit of measure being used for display.

The default density factor, used to estimate weight, is shown on this display. The default factor can be changed by simply keying in a new factor.

```
-SalesMate V7.4-
^ 7.00  lb / ft³
 -> ENGLISH, US
-Setup   98,156-
```

2.5 TARIFF SETUP

> If you have SalesMate without rating, skip to Section 2.5 at this time.

In order to initialize and edit tariffs, press [YES] at the **Edit Tariffs** prompt in SETUP. If you have a version of SalesMate without rating, the following option will not be shown in Setup

```
-SalesMate V7.4-
EDIT   Tariffs ?

-Setup   76,555-
```

> Let's enter Tariff Setup. Press [YES] at the display shown above and you should proceed to a Select Tariff prompt similar to the one below.

2.5.1 TARIFF SETUP – CONTAINERS & VALUATION

Container and Valuation Files can be created and edited in FirstMate. SalesMate V7.4 allows you to also create and edit container and/or valuation files in SalesMate. After saying yes to Edit Tariffs, you will be given the change to edit Container and Valuation Files with the following prompt:

```
---- Tariff ----
 Edit Container
Valuation Files?
-Setup   76,555-
```

To edit Container and/or Valuation Files press the [YES] key and then select which of the files to edit. To procede to Tariff selection press [NO.

2.5.2 TARIFF SETUP - SELECTION

The first step is to select the tariff you wish to edit. Following is an example.

```
---- Tariff ----
Select ICC 400-M
eff:  1/ 1/2000?
-Setup   76,555-
```

Tariffs must be initialized before they can be used! To initialize or edit a tariff, press the [YES] key. To select another tariff, press [NO] or ! and SalesMate will advance through available tariffs.

> The displayed Tariff should be one you want to use. Press [YES] to select it. You will see "**initializing ...**" temporarily displayed if this is the first time the tariff has been selected. You will proceed to the first item in the tariff.

A Tariff can be de-activated at the Select Tariff prompt by pressing the [DELETE] key. If a tariff is de-activated or not initialized, it will not be available for Rating of a Move.

> You need to initialize all of the tariffs you want to use and set your defaults. If you are a first time user, we recommend that you do that after the initial training is complete. Press [END] to exit Tariff Setup and you will return to the prompt **Edit Tariffs**.
>
> We want to do one more thing before we continue. Press ! until you see the display for the **PRINTER**. It must be set to the printer used with your system. If it is not, Press [NO] until the proper printer is displayed. Now Proceed to **RATE THE MOVE (RATING)** (Section 7.0).

2.5.3 EDITING A TARIFF

Once a tariff has been initialized it is available for use, however you will want to edit the tariff to customize it for your use. *Note that it is necessary to use the* ! *key to advance to the next item* as the [YES] is now used to turn an item ON. There are a number of choices with displays while editing the items in the tariff.

- Enter (or change) a rate.
- Enter (or change) a schedule
- Enter (or change) a default option
- Turn a group of items off (or back on)
- Turn an individual item off (or back on)
- Specify if an item is allowed to be discounted during rating.
- For generic tariffs, you can select the type of transportation rates.

In the following example you are given a menu of choices that will be used as the default (in this example the choice has been preset to [1] for non-peak. To change press the appropriate number by the desired choice. If the selection is correct, press the ! key to advance to the next item in the tariff.:

```
---- Tariff ----
SEASON RATES [1]
1-NONPEAK 2-PEAK
-Setup   43,266-
```

For tariffs that use schedules you can preset the schedule. In the following example, you can preset the Cost Schedule at Origin (the [?] indicates that a default has not been set. You will only be allowed to put in valid choices (e.g. Schedules for the 400-M tariff can be A-D (assuming there are no exceptions for your carrier)). You can enter a schedule by pressing the appropriate key on the keypad, or press ! to continue to the next item.

```
---- Tariff ----
COST SCHEDULE at
Origin      [?]
-Setup   43,226-
```

In the following example, you are being told the "Lookup Rates" are being used for Transportation items. SalesMate supports rates/100 lbs. and Base/Excess rates. To change the type of rates, press the [NO] key and you will toggle between the available rate types. If the tariff being edited has defined the rate type, you will not be allowed to change it. In this example you are being informed that the transportation rates are discountable. The

small "v" after Discountable is informing you that you can change this item to be non discountable by pressing the b (small down arrow) key. If the item is set to "Non Discount", it can be changed to be discountable by pressing a (small up arrow).

```
---- Tariff ----
Transportation
       Lookup Rate
  Discountable v
```

Items or groups of items can be turned off or back on with the use of the [NO] and [YES] keys. In the following example, a Fuel Surcharge can be set by simply keying in the rate.

```
---- Tariff ----
Fuel Surcharge
       RATE   0.22
  Discountable v
```

To turn the Fuel Surcharge off, simple press the [NO] key. To turn the item back on, press the [YES] key during editing of the tariff, use the [YES] and ! keys to advance if the selection or rate is OK. To change a rate or selection, simply enter the new rate or selection (it is not necessary to press the [CLEAR] key first).

```
---- Tariff ----
Fuel Surcharge
      - NOT USED!
   Discountable v
```

If a group of items can be disabled, "[NO] if NOT USED" will be displayed on the bottom line of the display as shown in the following example.

```
---- Tariff ----
HourlyPACKING[?]YE
S,  or NO-Unit
[NO] if NOT USED
```

In this example, all hourly packing items will be disabled if you press [NO] (shown in following example). The "[-]" indicates that the option of Hourly Packing has been disabled. To turn hourly packing back on, simply press [YES].

```
---- Tariff ----
HourlyPACKING[-]
YES,  or NO-Unit
     -  NOT USED
```

If a group of items are turned off, the actual items in that group may or may be shown in the rest of the tariff during editing. For Elevator/Stair/Long Carries groupings, the items with the rates for each item will not be shown. In the example used of hourly packing, the actual packing and unpacking items will be shown in setup but will be disabled during rating.

Tariff defaults are copied to a customer when the customer is first rated. Changes made to the defaults will not affect estimates that have already been rated. If you need to have changes apply to an existing rated Customer, go to that Customer and press the [DELETE] key at the prompt **RATE the MOVE** and delete the rating, then Rate the Move again.

2.5.4 RE-INITIALIZING TARIFFS

A tariff can be cleared and removed from use or reset to it's original default settings by pressing [DELETE] at the prompt **Edit ---name--- Tariff defaults?** (you will then be prompted if you wish to **DELETE RATING ARE YOU SURE ?**). If you respond [YES] the tariff will be cleared. The tariff can re-initialized from the prompt **"Select ---name---eff: ----------?"** at any time.

If the tariff does include container rates, you will be asked to select a container rate file from those that are available.

2.5.5 CONTAINER RATES

In addition to entering Container rates in SalesMate V7.4, Container, packing & unpacking rates may be entered in FirstMate and downloaded to SalesMate for tariffs that do not have all scheduled container, packing & unpacking rates within the tariff.

2.5.6 VALUATION RATES

All Valuation rates have been moved to a single valuation file in SalesMate V7.4. This File can be created in FirstMate and downloaded to SalesMate or created in SalesMate. The Valuation file has settings for all Valuation variables.

2.6 ADD TO UNPACKING

The Add to Unpacking option applies to Carrier Packed Cartons only. The two options available are "all Cartons" and "Mattresses only". When "Mattresses only" is selected, only mattress will have the unpacking quantity automatically increased when a Carton is scanned or the quantity is increased. When "all Cartons" is set, the unpacking quantity will be increased for all Carrier Packed Cartons whenever they are scanned or their quantity increased.

2.7 PRINTER SELECTION

SalesMate currently supports Pentax PocketJet, Canon BJC-50, Can BJC-80, IBM DeskJet, Kodak Diconix, OKIDATA 184 and HP LaserJet printers. Contact TechMate International for details on cable requirements.

The PRINTER parameter in SETUP must be set to the proper printer. To change the printer, simply press [NO] at the following prompt and you will advance to the next supported printer.

```
-SalesMate V7.4-
     PRINTER
LaserJet/Pentax
-Setup   43,266-
```

The cables used to connect SalesMate to a printer are special cables available only from TechMate International. Standard cables purchased from computer stores will not work.

If the printer is not set properly, press [NO] until you have the proper printer set.

2.8 EDIT ARTICLES

SalesMate allows you to define a number of user defined Articles. *These articles can only be entered while doing a Survey for a Customer*. Once they have been defined they can be edited and deleted in Setup. Press

[YES] at the following prompt to view and edit user defined articles (you will hear an alarm if there are no user defined articles defined).

```
-SalesMate V7.4-
EDIT   Articles
         ?
-Setup   43,266-
```

To edit previously entered user defined articles, press [YES] at this display. You will then be shown the first user defined article as shown below:

```
ARTICLE      # 1
             10f

DOG HOUSE
-Setup   43,266-
```

To change the name of the article, press [CLEAR] and enter the new name. To change the size, press the a and b keys to increase or decrease the size (1 cubic foot at a time). To delete the user defined article, press [DELETE] and confirm by pressing [YES].

Press the keys to review forward or backwards through user defined articles.

2.9 SPEAKER ON/OFF

The Computer's speaker can be turned ON or OFF (however the speaker will always be ON when editing the Inventory as the audio feedback is required to indicate valid scans and entries).

2.10 SALESMAN'S CODE

The Salesman's Code should be set to match a Salesman's Code in FirstMate. The Salesman's Code is a number from 0 to 9998 (**_do not use 9999 as this is a special code reserved for debugging purposes only_**).

2.11 PAPER SIZE AND TOP MARGIN

SalesMate support printing reports on Letter, A4 and Legal size paper. To change the paper size selection, press [NO] until the proper paper size is shown.

SalesMate allows you to specify a top margin if you want to print on letterhead paper. The top margin is set is 1/8 of an inch increments. If you want a ½ inch top margin, simply key in 4 [Enter] to set a 4/8" top margin. To clear the top margin, enter 0 [Enter].

2.12 MARGIN ON ALL PAGES AND BOTTOM MARGIN

In addition to a top margin from the previous display, you can also specify a bottom margin. The bottom margin is also set in 1/8 of an inch increments.

If either top or bottom margins are set, you then have the choice if you want the margins on the 1st page only or on all pages. To change the choice, simply press [NO] until the desired selection is shown.

3.0 SalesMate MENU

The home position is the **SalesMate Menu**. When you are there, **"SalesMate Menu"** will be displayed on the top line of your display. This is where customers are entered, deleted and selected. *No matter where you are, pressing the [END] key will eventually return you to the SalesMate Menu*.

You can connect to *FirstMate* by pressing the ♭ key when you are connected to *FirstMate* and *FirstMate* is active.

3.1 NEW CUSTOMER ENTRY

New Customers can be entered from the **SalesMate Menu.** Press the [CLEAR] key to initiate entry of a new Customer when you are at the **SalesMate Menu**.

:

```
^SalesMate Menu-
-> _____
  New Customer
```

Enter a new Customer ID and the Customer will become active. See **Customer active**. The name displayed within SalesMate will be the Customer ID that is entered, or will be constructed from the Shippers first and last names when they are downloaded from *FirstMate* (if Jim Smith is entered as the first and last names, the Customer ID will be shown as "Smith J").

Let's enter a second customer. Press [END] until you get to the SalesMate Menu and then press [CLEAR] and you should be at the display shown above*. We are going to do something a little different here so don't press the [ENTER] key after typing in "DELETEME". Enter* del eteme *to enter a customer (since the name is 8 characters this filled up the field and therefore it is not necessary to press [Enter])*. You should now be at the following prompt.

```
DELETEME  active
EDIT  Dates
        ?
```

3.2 CUSTOMER DISPLAY & SELECTION

Each Customer is identified with a 1 to 8 character ID. The last name of the Customer is typically used (the ID is only used to uniquely identify the Customer).

Customers in SalesMate are displayed in the **SalesMate Menu** by showing the customer ID. The ! and ! keys are used to scroll forward and backward through customers one at a time (they are in alphabetical order). ***You can also enter a search key to move quickly to a customer by pressing the [NO] key and then entering your search key.*** Once the desired customer is diploid, press the [YES] key to work with that customer.

```
SalesMate- Menu
-> JOHNSON   25
          374.2f3
   TOTAL  2619 #
```

To enter a new Customer, press the [CLEAR] key and you will be prompted for a new Customer. To delete a Customer, press the [DELETE] key and you will be prompted if you want to delete the Customer. ***If there are no Customers in memory, SalesMate will display "[CLEAR] New Customer".***

Refer to the **Customer active** section for additional details on what you can do when a Customer is active.

Press the ! and ! keys and you should move between SMITH and DELETEME (and any other Customers that have been entered. If you get an alarm you are at the end of the list in that direction.

3.2.1 DISPLAY MODE SUBTOTALS

The total estimated size and weight of the Customer's survey is shown when you are at the SalesMate Menu as follows:

```
SalesMate- Menu
-> JOHNSON   25
          374.2f3
    TOTAL  2619 #
```

You can display the estimated size and weight of each mode of transport at the SalesMate Menu by pressing [SHIFT] and each mode will be shown in turn. The units of measure displayed is controlled by the parameter in Setup.

```
SalesMate- Menu
-> JOHNSON   15
 7.00x   100.0f3
  ROAD     700 #
```

When a Mode is displayed, the Weight Factor for that mode is displayed (originally set from Setup) and can be changed by simply keying in a new Factor. Each Mode can have its own weight factor.

3.3 LOCATE A CUSTOMER

You can enter a ***Search Key*** at the SalesMate Menu in order to quickly find a specific Customer. To enter a Search Key, simply press the [NO] key and you will be prompted for a Key as follows:

```
^SalesMate Menu-
-> _____
   ?    Customer
```

Customers are sorted alphabetically by their Customer ID. If you want to find a Customer with a Customer ID of "SMITH", enter "S" to move to the first Customer starting with "S" or enter "SMITH" and you will move directly to "SMITH". After using the Search Key, you can then use the ! and ! keys to find the desired Customer.

3.4 DELETE CUSTOMER

Customers are deleted while you are at the **SalesMate Menu**. ***When you delete a Customer from the SalesMate Menu, all information (e.g. Dates, Names and addresses, Inventory, Rating, etc.) for the Customer is deleted***. Use the ! and ! keys to locate the customer to be deleted and press [DELETE] (the Ⱡ key). The following prompt is made to make sure of the deletion:

```
^SalesMate Menu-
DELETE  CUSTOMER
 ARE YOU SURE ?
```

Respond [YES] and the Customer and all of the Customer's files are deleted. Pressing any other key will abort the deletion.

> If you are not positioned at Customer "DELETEME" use the ! and ! keys to move to it, now press [DELETE] and then [YES] to delete the Customer "DELETEME".

Customers can only be deleted from the SalesMate Menu.

3.5 CONNECT TO FIRSTMATE

To connect SalesMate to FirstMate for transferring Customers from and to FirstMate, press the "B" key at the SalesMate Menu. Note that FirstMate must be running with Ready for handheld displayed. You must use the "PC to Telxon" cable from TechMate. When you are connected, you will have the following display on your Telxon.

```
----------------
   FirstMate
   on line ..
----------------
```

SalesMate is passive during the connection to FirstMate. FirstMate controls the uploading and downloading of Customers.

Downloading of new tariffs, languages, etc is done through Setup (see the next section).

3.5 SETUP FROM FIRSTMATE

You can exit ***SalesMate*** by pressing [SETUP] at the SalesMate Main Menu and the responding [YES] to the following prompt:

```
-SalesMate V7.4-
   Setup from
   FirstMate?
-Setup  364,878-
```

If you respond [YES], you will return to a shell program that will allow you to download files from FirstMate or re-start SalesMate. If you are running OmniMate, you will be able to start LoadMate.

4.0 CUSTOMER ACTIVE

When a new customer is entered or when an existing customer is selected from the **SalesMate Menu**, that customer becomes active. When a Customer is first made active, you will be at the Customer active menu. Things to do for the customer (e.g. enter his name, address, do the survey etc.) are selected from the Customer active menu. They are summarized as follows (if your system does not support rating, some of the following parameters may be absent):

- EDIT Dates
- EDIT Shipper
- EDIT Consignee
- EDIT Agents
- EDIT Survey
- PRINT Survey
- RATE the MOVE
- PRINT Estimate

When a customer becomes active, the first choice is to edit the dates.

```
SMITH      active
EDIT   Dates
           ?
```

The ! and ! keys are used to review forward or backward through the available functions (if you are at the last choice, you will move to the choice at the other end of the menu). Press [YES] to perform the function.

If you want to delete a Customer, you must be at or return to the SalesMate Menu. However, individual parts of information can be deleted from the Customer active menu. For example, if the information for the Consignee is wrong, the Consignee can be deleted by pressing [DELETE] at the **Edit Consignee** prompt in the Customer active menu. Another important example is if a Customer has been rated by one tariff and you wish to rate with another tariff, the current rating can be deleted by pressing the [DELETE] key at the **Rate the Move** prompt. In both of these cases, only those portions of the Customer are deleted.

> You should be in the SalesMate Menu. If you are not at the display showing totals for SMITH, press ! or ! until to find SMITH. Then press [YES] to activate SMITH. You should then have SMITH active shown on the top line of your display. Now press the ! key and note that you are moving forward through the options available (Edit Dates, Edit Shipper, Edit Consignee, Edit Agents, Edit Survey & Print Survey). Now press the ! key and note that you move backwards through the options. Continue again until you end up at EDIT Survey as shown below.

```
SMITH      active
EDIT   Survey
           ?
```

When you are finished working with a Customer, press [END] to return to SaleMate's Main Menu.

> Continue reading, we will pick up training again when we reach **Section 5.0 Surveying**.

4.1 CUSTOMER INFORMATION

Dates, shipper and consignee are always printed on the customer's reports (fields not entered will be printed as blanks).

SalesMate keeps track of which fields have been entered for customer information. If the field being displayed has not been entered and no fields after it have been entered, it will be automatically cleared for entry. When a field is entered, you will advance to the next field. If it has been entered, the entered data will be displayed (this includes entering all blanks for a field). Use the ! and ! keys to review the fields that have been entered. settings. To change a field, press the [CLEAR] key and enter the desired information (the [END] key will abort the change and leave the field as it was).

4.1.1 DATES

Following is a summary of dates that can be entered and an example of the first prompt:

```
JOHNSON    active
ESTIMATE   Date
   _____
---- Dates  ----
```

- Estimate Date
- Pack Date
- Pack Date 2
- Load Date
- Load Date 2
- Delivery Date
- Delivery Date 2
- Unpacking Date

You are allowed ten characters for each date. You may enter them any way you like. The . key is a "/" when Numbers are being entered so a fast way to enter dates is by using / as a separator (e.g. 3/12/98). This is done by pressing 3. 12. 98 and then [ENTER].

In order for dates entered on SalesMate to be accepted by a Host PC System, they will most likely need to be entered in specified formats (e.g. 09/10/1996). SalesMate makes no attempt to format or check the format of dates.

4.1.2 SHIPPER & CONSIGNEE

Information about the Shipper & Consignee is printed on all reports. If information is not entered, space is left on the reports. Following are the fields for the Shipper and Consignee and the first prompt:

```
JOHNSON    active
NAME >_____
first name
---Shipper    ---
```

- first name
- last name
- Address 1
- Address 2 (optional address line)
- City
- State
- Postal code
- Country
- Telephone
- Telephone 2

4.1.3 AGENTS

The Agents associated with each Shipper (Origin Agent, Carrier, Destination Agent and National Account) are displayed and set within Edit Agents. Only those Agents selected will be printed on reports.

When a Customer is entered in SalesMate, the Carrier and Origin Agent for a Customer are initially set using the default Carrier and default Agent set in SETUP when the Customer is created.

When a Customer is downloaded from FirstMate, the Agents will be those selected in FirstMate.

The selections of Carrier, Origin Agent, Destination Agent and National Account can be reviewed, entered, deleted or changed by Editing Agents from the prompt **EDIT Agents**.

```
┌────────────────────┐
│ JOHNSON    active   │
│ Carrier    ? ----   │
│                     │
│                     │
└────────────────────┘
```

Use the [Enter] or > keys to advance to the next Agent. Use the < key to return to the previous Carrier or Agent. Use the [NO] key to change the Carrier or Agent shown. A setting of "----" is used to indicate that the Agent is not set for this Customer.

```
┌────────────────────┐
│ JOHNSON    active   │
│ Agent ? 001         │
│ TECHMATE INT'L      │
│    Orig Agent       │
└────────────────────┘
```

A Destination Agent will not be set when a Customer is created. To set a Destination Agent, press [NO] at the following display until the appropriate Agent (or none) is selected

```
┌────────────────────┐
│ JOHNSON    active   │
│ Agent ? --------    │
│                     │
│    Dest Agent       │
└────────────────────┘
```

Origin Agents, Destination Agents and National Accounts can be entered within the Edit Agents Menu by pressing [CLEAR] and entering an Id for the Agent. For Origin and Destination Agents, if the Agent Id is already defined in Setup, you will move directly to that Agent. If the Id is not currently set in Setup, you will be prompted for the Name, etc. of the Agent.

```
┌────────────────────┐
│ JOHNSON    active   │
│ Acct Id BIG         │
│ A Big Company       │
│ ---Nat'l Acct---    │
└────────────────────┘
```

When Agents, are entered, you will be prompted for the following fields after first entering the appropriate Id for the Agent:

- Name
- Address 1
- Address 2
- City
- State
- Postal code
- Country (used as Contact for National Account)
- Telephone

- Telephone 2

4.2 EDIT Survey

To enter or review the Customer's Inventory, press [YES] at the prompt to **EDIT Survey**. Go to Secion 5 for details.

```
JOHNSON    active
EDIT Survey
          ?
```

4.3 PRINT Survey

To print the inventory, press [YES] at the following prompt from the **Customer active** menu:

```
JOHNSON    active
PRINT  Survey
          ?
```

Go to the **PRINT REPORTS** section for details.

4.4 ESTIMATE/ORDER FOR SERVICE

An Estimate or Order for Service is produced by first rating and then printing. If the estimate has not been rated, or the inventory has been changed you will not be allowed to print an estimate/order for service.

4.4.1 RATING

To print an estimate/order for service, press [YES] at the following prompt from the **Customer active** menu:

```
JOHNSON    active
RATE the MOVE
          ?
```

Go to the **RATE THE MOVE (RATING)** section for details.

4.4.2 PRINT ESTIMATE

To print an estimate/order for service, press [YES] at the following prompt from the **Customer active** menu:

```
JOHNSON    active
PRINT ESTIMATE
          ?
```

In order to insure that the printed estimate/order for service is valid, rating of the move must be complete and the inventory can not have changed since the move was rated.

Go to the **PRINT REPORTS** section for details

SalesMate 7.4

5.0 SURVEYING

SalesMate distinguishes itself from other surveying systems by being truly portable and by replacing the manual process of making hash marks on a cube sheet and then having to laboriously calculate the size and weight of the shipment. The survey is taken with the small hand held computer and a bar coded template. In addition to eliminating the math (which is time consuming and very error prone) the customer is provided a detailed multi-modal room by room inventory, a very important sales tool for you.

Editing the Inventory is entered from the **EDIT Survey** prompt in the **Customer active** menu shown below:

```
TESTING   active
EDIT Survey
          ?
```

Back to training, you should have **SMITH active** shown on the top line of the display. If you do, skip to the next paragraph. If you do not, press [END] until you return to the SalesMate Menu, locate Customer SMITH (using the ! and ! keys if necessary) and activate it by pressing [ENTER] (if a customer named SMITH has not been entered, press [CLEAR] and enter the customer SMITH. Customer SMITH will then be active..

Now use ! and ! keys to move to EDIT Survey as show above and skip to the next paragraph, To make sure the survey is empty, press [DELETE] at the **EDIT Survey** prompt. If you hear an ALARM, there is no survey. If you are prompted **DELETE Survey ARE YOU SURE ?** there is an existing Inventory - press [YES] (the [ENTER] key) to delete the existing Inventory.

Press [YES] to start the Survey. Since we are starting a new survey, you will need to first select the Mode of Transport.

```
    Mode   ?
_____
```

Scan the bar code for "Local" at the top of your template and you should have the following displayed on your Computer:

```
End of Inventory
_____

---- LOCAL  ----
```

Since a Room has not be scanned at this time, you will be at the "End of Inventory".

5.1 BAR CODE TEMPLATE

The household goods bar coded template is two sided with each side divided into sections of Modes, Rooms, Articles, Cartons & Contents.

The hierarchy is Mode - Room - Article. When Mode is scanned you will always stay in the same room. If Mode is changed by pressing [SHIFT], you will stay in the same room if it has been entered or you will move to the first room in the new mode if the current room has not been entered. Before scanning Articles, you should always check to make sure you are in the proper Mode and Room.

5.1.1 MODE OF TRANSPORT

The first step in taking the Survey is scanning the Mode of Transport on the template (ROAD, SEA, AIR, STORAGE, LOCAL or NONE). When "NONE" is selected as the Mode of Transport "Inventory" will be shown on the bottom line of the display as follows:

```
End of Inventory
_____


---Inventory ---
```

When Road, Sea, Air, Storage or Local is the Mode of Transport, the mode will be shown on the bottom line display as follows (e.g. STORAGE):

```
Living Room
_____


----STORAGE ----
```

5.1.1 ROOMS/AREAS

Before Articles or Containers can be entered, you must select or scan a room. Bar codes are provided for the most common rooms found in a residence.

In addition, there is a miscellaneous room bar code (the one with underscores near the top right hand corner of the template) that is used to enter any room or area that you want to survey (e.g. BATHROOM). Each time you scan the miscellaneous room bar code, you will be prompted for the name of a new room or area. Approximately 50 additional rooms can be defined.

When entering Rooms, always make sure you are in the proper mode. The current room will be displayed on the top line of the display.

Let's enter a Room. Scan the bar code for "Living Room" and you will now be in the Living Room for the "Local" portion of the move.

```
Living Room
_____


---- LOCAL  ----
```

5.1.2 ARTICLES

Articles are arranged on the template in rooms or categories where they would most commonly be found (e.g. Sofas in the Living Room) to make them easier for you to find. Most articles on the template have a default size shown on the template following the description of the article.

In case you need to enter an article that is not on the template, there are two types of miscellaneous articles for your use. The one with all underscores, located directly under the Bedrooms or Miscellaneous headings, will prompt for a new article each time it is scanned. The numbered miscellaneous articles located at the end of the Miscellaneous section (e.g. 1 _____) are remembered. The first time a numbered miscellaneous article is scanned, SalesMate will prompt for the cubes and then for the name of the article. The definition of numbered miscellaneous articles is unique to each customer's inventory.

Note that when you use miscellaneous Articles, translation to another language is not supported.

5.1.3 CARTONS

Cartons are shown near the bottom of the template. They are arranged with Carrier Packed (CP) Cartons on the left and middle and Packed by Owner (PBO) Cartons on the right. CP Cartons have additional quantities for packing and unpacking. CP Cartons will be discussed in more detail later. When PBO Cartons are scanned only their weight is added and there is no provision for selling the carton, packing or unpacking.

5.1.4 COMMENTS & CONTENTS

Bar codes for comments and contents of cartons (or articles) are at the bottom of the template. They are entered, by first scanning the COMMENT/CONTENTS bar code (or by pressing the COMMENT key, and then scanning one of the bar codes. In addition to the contents located at the bottom of the template, any Article can be used as a content of a carton (or article).

The comments and contents shown at the bottom of the template can also be used for comments or articles (scanned without scanning the COMMENT/CONTENTS bar code).

5.2 KEYS USED DURING INVENTORY

A large number of keys on the keypad take on special meaning when you are editing the Inventory. ***The function of these key is shown on the keypad overlay just above the key***. As a quick overview, the a and b keys (note the ! and ! above them) are used to adjust the cubes of an article. The c key is used to initiate entry of a COMMENT for or CONTENT of an article. The d key is used increase the QUANTITY of an article. The f key is used to [DELETE] articles or rooms. For SalesMate systems with rating, the g, h & i keys are used to control packing and appliance servicing at origin (PK/SVO all or none, 1 more or 1 less), and the k, l & m keys are used to control unpacking of containers and appliance servicing at destination (UNPK/SVD all or none, 1 more or 1 less). The j or [LOC?] key is used to move an article to another room or mode. The o and p keys ([+ 1] and [- 1]) are used to add 1 to or subtract 1 from the quantity of an article. The 8 and 5 keys are used to identify articles that are not going ([LEAVE 1] to shown an article as not going or [TAKE 1] to reverse the decision to leave an article).

The [SHIFT] key is used to shift the Mode of Transport (limited to those that have been entered). The ! and ! keys are used to review backward or forwards through the inventory one article at a time. [! ROOM] and [! ROOM] (the 9 and 6 keys) are used to move backward of forward a room at a time within the current mode of transport. [! CARTON] and [! CARTON] (the 7 and 4 keys) are used to review backward or forward through Carrier Packed cartons in the inventory.
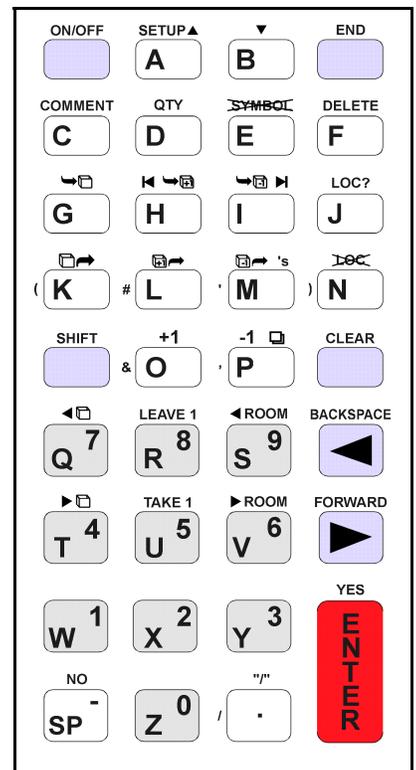
The key pad overlay is designed for use by both SalesMate and LoadMate. As a result, some of the keys are not used by SalesMate (Symbol and Loc).

5.3 SETTING THE CURRENT MODE

The mode of transport is set by simply scanning one of the Mode bar-codes on the template. When a new MODE is scanned, you will stay in the same Room.

5.3.1 CHANGING MODES

You can switch the mode of transport by scanning one of the MODE bar codes on the template. Once a mode has been scanned for a Customer, you can use the [SHIFT] key on the keypad to shift from one mode of transport to another.

> Let's enter another Mode of Transport. Scan the "Storage" bar code near the top on the front page of the template and you should be have the following.

```
End of Inventory
_____

----STORAGE ----
```

When you change Mode by scanning a bar code, you will stay in the same room from the previous mode. If you use the [SHIFT] key, you will stay in the same room if that room has been previously entered.

> Now press [SHIFT] and note that the mode has changed back to Road. You could have changed back to Road by scanning the bar code next to Road.

5.4 SETTING THE CURRENT ROOM

A room is entered by simply scanning a room bar code. The first time a room is scanned, the room will be entered and you will be positioned at the start of that room (this will be referred to as the ***current room***). The name of the current room is shown on the top line of the display. If a room bar code is scanned for a room that has already been entered, it will become the current room and you will be positioned at the start of the room.

After selecting the room, articles are entered by scanning the bar code by the article. Each time an article is scanned, 1 is added to the quantity. Again, all Articles (including Containers) scanned are placed in the current room.

> Turn your Computer ON (if necessary). Let's enter Living Room by scanning the bar code just to the left of Living Room in the Room/Area section of the template. You have now entered the Living Room and it becomes the current room.

```
Living Room
_____

----  ROAD  ----
```

> Let's enter a second room. Scan Dining Room and Dining Room is entered and it becomes the current room.

```
Dining Room
_____

----  ROAD  ----
```

5.4.1 MISCELLANEOUS ROOMS

A Miscellaneous room/area bar code is provided in the Room section of the template so that you can define rooms or areas that are not found on the template. Each time this bar code is scanned, you will be prompted for the name of a room (up to 16 characters can be used for the name).

```
^      Room      ?
_____
----  ROAD  ----
```

Let's enter a Miscellaneous room. Turn your Computer ON and scan the miscellaneous room bar code (it has all blanks and is located near the top right of template). You will hear a double beep as a reminder that you need to enter something. You should have the prompt shown above.

Enter hall [SP] closet and press [ENTER]. You are now at the start of the HALL CLOSET (it is the current room).

```
HALL CLOSET
_____
----  ROAD  ----
```

Miscellaneous rooms are placed after all pre-defined rooms and will be shown and reported in the order that they are defined. Note that the names of miscellaneous rooms or areas will be all capital letters.

5.4.2 CHANGING ROOMS

You can change rooms by simply scanning the bar code for the desired room and you will move to the start of that room.

You can also use [↑ ROOM] and [↓ ROOM] (the 9 and 6 keys) to move forward or backward one room at a time within a mode. *Remember that since Miscellaneous Rooms do not have specific bar codes, you must use the [↑ ROOM] and [↓ ROOM] keys to move to them*.

Let's practice changing rooms. Turn your Computer ON. The current room should be the HALL CLOSET. Scan the bar code for Living Room and Living Room becomes the current room.

```
Living Room
_____
----  ROAD  ----
```

Now press [↓ ROOM] (the 6 key) and Dining Room will be the current room.

```
Dining Room
_____
----  ROAD  ----
```

Press [↓ ROOM] again and you will move to the HALL CLOSET.

```
HALL CLOSET
_____
----  ROAD  ----
```

Press [↓ ROOM] one more time and you will move to the end of the inventory.

```
End of Inventory
_____


---- ROAD ----
```

Now, return to the Living Room by pressing [! ROOM] (the 9 key) until you reach the Living Room. Press [! ROOM] one more time and you will hear an ALARM as you are at the beginning of the inventory.

You may return to a room or area at any time to add, modify or delete articles.

The ! and ! keys will move you forward or backward one article at a time within a mode. When you reach the beginning or end of a room, you will move to the previous or next room.

5.4.3 DELETING A ROOM

An entire room can be deleted by pressing the [DELETE] key when you are positioned at the start of the room.. You will be prompted **DELETE Room ARE YOU SURE**?. *This should be used with caution as all of the contents of the room are deleted*.

5.5 ENTERING ARTICLES

Articles are entered by scanning the bar code next to the desired article. One (1) article is added in the current room each time an article's bar code is scanned. *Articles can be scanned in any order and from anywhere on the template*. If an article is scanned for the first time in a room, an entry is made and that article is displayed. If the article scanned has already been entered into the current room, the quantity is increased by 1 and the article is displayed.

```
Living Room
  1 _          8f
Table, End
---- ROAD ----
```

Turn your TELXON on. You should be in the Living Room. Locate the bar code for **Table, End** and scan it. You should see the display show above.

Scan **Table, End** again and the quantity will increase to 2 (see the display below).

```
Living Room
 2_           8f
Table, End
---- ROAD ----
```

5.5.1 ADJUST CUBES (SIZE)

While an article is displayed, it's size is displayed as follows:

```
Living Room
  2_          8f
Table, End
---- ROAD ----
```

When an article is scanned for the first time in a room, the default size from the inventory is used. The "f" following the number 8 above indicates that the size is being displayed in cubic feet. The size can be adjusted up or down by 10% or 1 cubic foot whichever is larger by using ! and ! (the a and b keys). Note that you are changing the size of the article for the current room only.

Let's assume the End Tables are only 5 cubic feet. Press ! three times and note that the cubes are reduced to 5.

```
Living Room
  2_           5f
Table, End
----  ROAD  ----
```

5.5.2 ADD OR DELETE QUANTITY

While an article is displayed, the quantity can be adjusted with [+1] and [-1] (the O and p keys). Each time [+1] is pressed, the quantity will be increased on 1. Each time [-1] is pressed, the quantity will be decreased by 1. If [-1] is pressed when the quantity is 1, you will be prompted if you desire to **DELETE ARTICLE ARE YOU SURE ?**.

Turn your Computer ON. Press [+1] and the quantity of the Table, End should increase to 3.

```
Living Room
  3_           5f
Table, End
----  ROAD  ----
```

Press [-1] and the quantity will be decreased to 2.

```
Living Room
  2_           5f
Table, End
----  ROAD  ----
```

5.5.3 ADD TO QUANTITY

If there are many items of a single type (e.g. 20 small cartons), scan or move to the article and then press the [QTY] key to initiate adding to the quantity.

Turn your Computer ON. Scan the bar code next to Carton, Small in the CARTONS section of the template.

```
Living Room
  1            2f
Carton, Small
----  ROAD  ----
```

Press the [SHIFT] key for the following prompt (for a quantity to be added):

```
Living Room
  1  +___add Qty
Carton, Small
----  ROAD  ----
```

Enter 19 [Enter] and 19 will be added to the quantity resulting in a quantity of 20:

```
Living Room
 20_          2f
Carton, Small
----  ROAD  ----
```

5.6 ARTICLES NOT GOING (LEAVE)

All articles (with the lone exception of Carrier Packed Containers used with rating) can be entered into the inventory and then designated as "not going". This is done with the [LEAVE 1] key. Each time [LEAVE 1] is pressed, 1 will be subtracted from the quantity and added to the number to be left. If you change your mind, the [TAKE 1] key is used to reverse the action of the [LEAVE 1] key. Each time [TAKE 1] is pressed, 1 is subtracted from the number being left and added back to the quantity going.

Let's enter a Grand Piano and show that it is not going. Scan the bar code for **Piano, Grand** (it is in the Living Room grouping on the template).

```
Living Room
  1  _        70f
Piano, Grand
----  ROAD  ----
```

Now press [LEAVE 1] and note that the quantity goes to zero. The **1L** indicates that 1 is being left.

```
Living Room
 0_     1L   70f
Piano, Grand
----  ROAD  ----
```

Now press [TAKE 1] and note that the quantity going returns to 1 and the number to be left changes to zero as follows. Press [LEAVE 1] again and you will return to the display above.

5.7 CP and PBO CARTONS

Cartons shown in the CARTONS section of the template are assumed to be CP (Carrier Packed) unless they are marked as PBO (Packed by Owner) on the template.   PBO cartons on the template are treated as normal articles and will not be listed in the Carton Summary with the Survey.

The total number of Cartons (CP only) will be shown in a special CONTAINER at the end of the Survey Report.

The ! CARTON and ! CARTON keys (the 4 and 7 keys) can be used to move forward and backwards through the Survey (within the current mode) looking only at CP Cartons.

PBO (Packed by Owner) Cartons are treated like normal articles in that only their quantity and weight is being entered. It is assumed that there is no option of selling the containers, packing or unpacking services. *PBO*

Cartons should only be used if there is no chance of selling Cartons or providing Packing or Unpacking Services.

CP Cartons maintain separate quantities for the number to be packed and to be unpacked. In the example below, the **5p** indicates that 5 may be Packed and the **0p** indicates that none are to be Unpacked.

```
┌─────────────────────────┐
│ Master Bedroom          │
│  5_       5p    0u      │
│ Wardrobe Carton         │
│ ----  ROAD  ----        │
└─────────────────────────┘
```

The parameter **Add to Unpacking** in **SETUP** determines if the unpacking quantity is increased for all Cartons or just for mattresses when a Carrier Packed Carton is entered. Since the most common cases are to have no unpacking or mattresses only, the default is MATTRESSES ONLY (only add to the unpacking number when a mattress is entered). If you are doing a full unpack, you can enter SETUP and change the parameter to ALL CARTONS before the inventory is taken, or adjust the Unpacking numbers manually.

Quantities for packing and unpacking are used only if the service is selected during rating.

The international version of SalesMate does not contain any Cartons that use packing and unpacking quantities.

> If you are using an international version of SalesMate skip the rest of this section.

Packing and Unpacking quantities are manually controlled with the keys **(PK/SVO   +1   -1)** and **(UNPK/SVD +1   -1)** (the g h i   & k l m keys). The key to the left or the three key group will set Packing or Unpacking to ALL or NONE. The key in the middle will increase the Packing or Unpacking number by 1 and the key to the right will decrease the Packing or Unpacking number by 1. Note that SalesMate will allow you to Pack or Unpack more Cartons than you enter.

> Lets try some CP Cartons. Turn your Computer ON. Let's move to the Dining Room by pressing [! ROOM]. Now scan the bar code for **Dish Pack** directly under the heading **CARTONS**. You should have the following displayed:

```
┌─────────────────────────┐
│ Dining Room             │
│   1       1p    0u      │
│ Disk Pack               │
│ ----  ROAD  ----        │
└─────────────────────────┘
```

> Now let's increase the number of Dish Packs to 5. Press [ADD 1] 4 times and note the quantity and number to be Packed increases to 5.

```
┌─────────────────────────┐
│ Dining Room             │
│   5       5p    0u      │
│ Disk Pack               │
│ ----  ROAD  ----        │
└─────────────────────────┘
```

> Now lets change the Packing and Unpacking quantities. Press UNPD/SVD (this is Unpack all or none) and the quantity to be Unpacked will change to be the same as the number of Dish Packs (5).

```
┌─────────────────────────┐
│ Dining Room             │
│   5       5p    5u      │
│ Disk Pack               │
│ ----  ROAD  ----        │
└─────────────────────────┘
```

Press PK/SVO and the Packing quantity will go to zero. Press it again and the Packing quantity will return to 5. Let's assume that you want 2 of the Dish Packs unpacked. Press the m key (Unpack 1 less) 3 times and the Unpacking quantity should be reduced to 2.

```
Dining Room
  5      5p   2u
Disk Pack
----  ROAD  ----
```

Let's try it another way. Press the K key and the number to be Unpacked will be all (or 5 in this case), press K again and the number will return to 0 where we started. Now press the l key twice and the number to be Unpacked will increase to 2.

5.8 MISCELLANEOUS ARTICLES

There are two types of miscellaneous articles on the template.   The one with all underscores located directly above the NURSERY heading or under the MISCELLANEOUS heading will prompt for a new article each time it is scanned. You are prompted for both the size (in cubes) and name of the article. Numbered miscellaneous articles, located at the bottom of the right column on each side of the template (e.g. 1 _____), are remembered (they are covered in the next section).

Scan the bar code with all blanks directly under **MISCELLANEOUS** on the page 2 of the template.

```
Utility Room
  1  _  -->? ___f
Miscellaneous
----  ROAD  ----
```

You are being prompted for the size. Let' s assume we have a large Trunk that is 15 cubes. Enter 15 followed by [ENTER]. You will now be prompted for the name of the article.

```
Utility Room
  1  _     ?  15f
_____
----  ROAD  ----
```

Enter t r u n k [ENTER] and a TRUNK has been entered.

```
Utility Room
  1  _        15f
TRUNK
----  ROAD  ----
```

Scan the same miscellaneous bar code again and note that you are prompted for another miscellaneous article. Press [END] to terminate the entry of another miscellaneous article.

5.8.1 NUMBERED MISCELLANEOUS ARTICLES

Ten Numbered miscellaneous articles are located on each side of the template (e.g. 1 _____). The first time a numbered miscellaneous article is scanned, you are prompted for the size and name of the article. If a numbered

miscellaneous article is scanned again, the initial definition will be used. The definition of numbered miscellaneous articles is unique to each Customer.

The description/name of a numbered miscellaneous article can be changed by pressing the [CLEAR] key when it is displayed, but note that this will change the name of the article for subsequent use in the current customer. The initial definition of the article will not be changed. In order to change or delete a miscellaneous article, you need to go into Setup.

5.9 COMMENTS (CONTENTS) FOR ARTICLES

While an article is displayed, a comment or content can be attached to an article by scanning the CONTENTS bar-code or pressing [COMMENT] (the C key) on the keypad. After scanning or pressing [COMMENT] you can scan any Article or Comment on the template or key in a comment. Comments are limited to 16 characters.

```
Living Room
  1  _       750#
Sofa, 3 Cushion
_____
```

Comments are printed on the Survey Report in italics after the article.

```
Living Room
  1  _       750#
Sofa, 3 Cushion
STRETCH WRAP
```

Comments can be changed by pressing the [CLEAR] key. To delete a Comment, press [CLEAR] and then immediately press [ENTER].

5.10 MOVING ARTICLES

An Article (or Carton) can be moved to another Mode (it will stay in the same room) or moved to another Room within the current mode. When the Article is displayed simply press the LOC? Key on your keypad and then scan the desired Room or Mode and the Article will be moved. Any other action will cancel the move. This feature was introduced with SalesMave V7.4f.

5.11 DELETING ARTICLES

While an article is displayed, it can be deleted by pressing [DELETE] (the f key). You will be prompted **DELETE ARTICLE ARE YOU SURE ?**. If you press [YES] all of the quantity for the article will be deleted from the room.

5.12 REVIEWING ARTICLES

The ! and ! keys can be used to review forward and backward through the customer's inventory one article at a time.

If you want to review the articles in a room or area, it is best to go to the start of the room by either scanning the bar code for the room or by using the [! ROOM] or [! ROOM] keys. Once you are at the start of a room, then use the ! key to review the articles in the room. ***When an article is displayed, it can be changed as desired***.

Let's review the articles in the Living Room. Press the [! ROOM] key until you get to the Living Room.

```
Living Room
_____

---- ROAD ----
```

Now press the ! key and you will review articles in the Living Room.

```
Living Room
 2_            3f
Table, End_____
---- ROAD ----
```

Continue pressing ! and you will eventually move to the Dining Room.

You have completed working with the inventory. Press [END] to return to the Customer active menu. Now proceed to **SETUP** (Section 2) and we will set the Carrier and your Agency and initialize tariffs in preparation for Rating.

5.13 APPLIANCE SERVICING

If you are not using Rating with SalesMate, skip this section

Articles that can have appliance servicing charges added during rating are marked with a single "$" on the template. The articles listed below have the possibility of being serviced (disconnection at origin and hookup at destination):

- Dryer, Electric
- Dryer, Gas
- Freezer 16 Over
- Refrigerator 11'-Over
- Washing Machine

Articles with the possibility of servicing are displayed as follows:

```
Utility Room
 1_        1s 1d
Dryer, Gas
---- ROAD ----
```

1s indicates the number to be serviced at origin and **1d** indicates the number requiring service at destination. Both of the service numbers will be increased each time the quantity is increased.

Quantities for servicing of appliances at origin and destination are used only if the service is selected during rating.

The service numbers can be manually adjusted in the same manner as CP Container Packing and Unpacking numbers. On the keypad SVO stands for SerVice at Origin and SVD stands for SerVice at Destination.

Let's try this. Scan **Utility Room** and then scan **Dryer, Gas** twice to enter two gas dryers.

```
Utility Room
 2_        2s 2d
Dryer, Gas        --
--  ROAD   ----
```

Now let's assume that only 1 Dryer is to be serviced at origin and destination. Press Ɩ   (service 1 less at origin) to reduce the origin service number to 1 and then Ɩ   (service 1 less at destination) to reduce the number to be serviced at destination to 1.

```
Utility Room
  2 _       1s 1d
Dryer, Gas
----  ROAD   ----
```

5.14 LIGHT & BULKY ARTICLES

Light & bulky articles have significance when rating with U.S. Interstate Tariffs. Light & bulky articles are marked on the U.S. version of the template with either a "$$" symbol or with a weight additive symbol (e.g. 700#). This is an indication that either a flat charge or weight additive may apply when rating with a U.S. interstate tariff (e.g. 400-M).

You can change the name of a Light & Bulky Article by pressing the [CLEAR] key and keying in a new name. This can be useful if the actual article having a flat charge or weight additive is not shown on the template. An example would be for a Skiff which is not on the template but is has the same weight additive as a Canoe, etc. >14'. In this case, simple scan Canoe, etc. >14', press [CLEAR} and enter "SKIFF.

5.14.1 AIRPLANES & ULTRALIGHTS

Planes are considered as a Light & Bulky Article, but you will be prompted for the length of the plane for rating purposes.

Now let's try Plane/Ultralight. Scan **Plane/Ultralight**. SalesMate prompts for the length of the plane as follows:

```
Garage
  1
Plane/Ultra  __'
----  ROAD   ----
```

Enter 10 for the length.

```
Garage
  1_        100f
Plane/Ultra  10'
----  ROAD   ----
```

6.0 PRINTING - SURVEY REPORT

The Shipper's Inventory can be printed at any time by responding [YES] to the prompt **PRINT Survey** in the **Customer active** menu. Dates, Shipper, Consignee, Origin Agent and Carrier Information are printed on the Inventory.

The survey is summarized by mode of transport and then by room/location with size, weight and item count per location. Each article is shown with the quantity and the size (or weight in some cases). The Inventory is summarized with the total number or articles, size (in cubic feet) and estimated weight.

Since cartons are left in the move/room/area where they were entered, a special carton summary is provided.   In addition, if any articles are being left, a special summary of articles not going is provided.

Connect SalesMate to the printer cable provided with your system. Make sure the printer is turned on, the paper positioned properly, the printer is ready.

To print the inventory, press [YES] at the prompt **PRINT Survey** and you will be prompted for the unit of measure desired and the language to be used during printing.

```
SMITH     active
 ->   # & ft3
 ?   ENGLISH
```

To change either the unit of measure to be used or the language, press [NO]. From the display above you would change to metric as follows:

```
SMITH      active
 ?    Kg & .1 m3
 -> ENGLISH
```

When the desired combination of language and unit of measure is displayed, press [YES] or !   and you will be prompted 1) if you want the size of each article to be printed, 2) if you only want subtotals for each Room, Modes and Survey or 3) if you do not want sizes on the Survey report. The current selection will be displayed as "Print Cubes", "Cube Totals", "no Cubes", "VALUE" or "Weight". Press [NO] if you want to change the selection. Press ! or [YES] to start printing when the desired selection is displayed. Following is an example:

```
SMITH      active

   Print Cubes ?
```

If the report does not print or is not printed properly, turn the printer off and back on again, make sure the cable is firmly seated, make sure the paper is aligned properly and make the proper printer is set in Setup.

If you have a version of SalesMate without rating, you have completed training. Press [END] until you return to the SalesMate Menu and our Customer SMITH should be displayed. Press [DELETE] to initiate deletion of TESTING and then [YES].

Now we recommend that you try a few practice surveys with SalesMate. If you have any questions, now is the time to call TechMate International. We would appreciate your comments on SalesMate and especially the training portion of this manual.

7.0 RATE the MOVE (RATING)

The Rating of a Move (preparing an Estimate or Order for Service) consists of the following steps:

- Selection of Tariff to be used.
- Rating of the Inventory.
- Adjusting the Weight (if desired).
- Entry/review of Parameters/Services.
- Display and review of total charges.

7.1 TARIFF SELECTION

The first step in Rating a Move is the selection of the tariff to be used. Only Tariffs that have been initialized in SETUP can be selected. If no tariffs have been initialized, the error message **Enter SETUP & Edit Tariff's !** will be displayed. If the tariff has already been selected, you will proceed directly to the weight.

The first available Tariff will be displayed as follows (the date is normally the effective revision date of the Tariff):

```
---- Rating ----
Select ICC 400-M
eff:  1/ 1/2001?
-- parameters --
```

Press [YES] if this is the desired tariff and you will advance to the shipment weight. If not, press [NO] or ! to advance to next available tariff.

> Let's go ahead and rate the move for TESTING. Press [YES] to select the tariff displayed and the inventory will be rated and you will proceed to the display of the weight.

7.2 RATING THE INVENTORY

After selecting the tariff, SalesMate rates the inventory (if there is one). A number of things are determined when the inventory is rated:

- The total weight of the inventory is calculated. Weights of Light & Bulky articles and for Automobiles are kept separate from other articles in the inventory as they are not used for some charges (e.g. long carries, stair flights).

- Quantities for CP Containers with packing and unpacking, pianos/organs and appliance with possible servicing are determined. This is so that services for these items is only prompted for if appropriate (e.g. you will be prompted for piano stair flights only if pianos or organs are in the inventory).

- Flat Charges and Weight Additives are determined when appropriate (this is obviously tariff dependent).

7.2.1 ADJUSTING THE WEIGHT

The weight is computed by multiplying the total cubes in the inventory times a factor plus the weight of any articles that have weight entered directly. The weight will be displayed as follows (if there is no inventory or the weight is less than 1000#, a weight of 1000# will be estimated). Following is the display:

```
+------------------------+
|  ---- Rating ----      |
|  Inventory Weight      |
|   ???? >   5,789#      |
|  -- parameters --      |
+------------------------+
```

To continue with the displayed weight, press ! or [Enter]. To ***adjust*** (override) the weight, simply key in a new weight and press [Enter]. Note that you are not allowed to enter a weight less than 1000 pounds. Pressing [END] at this time will cancel the rating process.

> Let's use the weight as displayed. Press ! to accept it. You will now proceed to the rating parameters.

7.2.2 CHANGING THE FACTOR

The weight is initially computed using the factor (or density) from SETUP. To change the factor for a mode of a Customer's survey, press [SHIFT] at the SalesMate Main Menu until the desired mode is displayed and then simply key in a new factor for that mode. Note that the factor does not apply to light & bulky articles

7.4 RATING PARAMETERS

After the tariff has been selected and the weight calculated (and adjusted if necessary), rating proceeds to the rating parameters for the selected tariff. Rating parameters consist of choices (e.g. type of contract), information needed by the tariff to rate the move (e.g. miles, rates or schedules) and services to be provided (e.g. packing, crating, etc.). These are obviously dependent upon the tariff and the survey.

There are a number of different types of choices, values and selections that need to be made. Some parameters are values (e.g. miles) and are simply keyed in when requested. If you wish to change a value, just key in the new value. Some choices are multiple choice (e.g. 1-peak, 2-non peak). In these cases, the current choice is shown within square brackets. If no choice has been made, the value will be [?] and a choice must be made to continue. Some of the choices or values can be set as defaults in Setup.

If the current setting displayed is correct, use the ! key to proceed to the next parameter. You can use the ! key to review previous settings.

Some settings require YES or NO responses. The current selection is shown in square brackets: ([Y] for yes, [N] for no or [?] if a selection has not been made.

Some services are prompted only if the condition is present in the Inventory (e.g. Unpacking by the unit is not be prompted for if there are no unpacking quantities entered in the Inventory).

> Since prompts are tariff dependent, specific help text is not provided. Go all the way through the rating parameters and respond to the prompts, they should be fairly obvious. After you have responded to all prompts, the move will be rated and you will be shown the estimated cost of the move. Press ! and you will proceed to PRINT Estimate.

If you press [END] during entry or review of the rating parameters, you will be asked if you want to proceed with rating.

```
+------------------------+
|  ---- Rating ----      |
|      Continue          |
|      RATING ?          |
|  -- parameters --      |
+------------------------+
```

Press [YES] to continue Rating. Respond [NO] or [END] to return to the **RATE the MOVE** prompt. ***All choices and selections up to and including Valuation should be made before Rating is allowed to proceed***. Any selections that have not been made will be assumed to be NO if Rating continues.

7.4.1 RE-RATING A MOVE

A move can be re-rated at any time to change choices and answer ***what-if*** questions. Respond [YES] to **RATE the MOVE** and then use with the !   key to review previous choices. After you have changed one or more choices, press [END] to end review of the rating parameters and you will be prompted if you wish to **Continue RATING ?**. If you respond [YES] the move will be rated. This may be repeated as many times as necessary.

8.0 ESTIMATE/ORDER FOR SERVICE REPORT

SalesMate provides a number of types of Estimate/Order for Service Reports.

To print an estimate/order for service, press [YES] at the following prompt from the Customer active menu:

```
---[JOHNSON ]---
PRINT ESTIMATE
        ?
---- active ----
```

In order to insure that the printed estimate/order for service is valid, rating of the move must be complete and the inventory unchanged since the move was last rated.

If you want to check which print mode is being used (DRAFT or NLQ), press ! and the current mode will be displayed. Press [NO] to change the mode. Press ! to return to the selection of the type of report.

The type of report is selected at the following display:

```
--- Printing ---
PRINT DETAILED
Estimate/Order ?
--- options ----
```

Pressing the [NO] key will change to the next report type. Available reports are:

- DETAILED
- SUBTOTALS
- Services INCLUDED
- WORKSHEET

If the Services Included report is selected, you can have Container Rates and Charges printed by responding [YES] to the following prompt. If you respond [NO], Rates and Charges will not be shown.

```
--- Printing ---
PRINT ServicINCL
Container Rates?
--- options ----
```

Connect SalesMate to the printer cable. Make sure the printer is turned on, the paper positioned properly, the printer is ON, the select button is ON and the green ready light is ON. Then press [Enter].

If the report is improper, turn the printer off and back on again, make sure the cable is firmly seated, make sure the paper is aligned at the top of the page, make sure that the proper printer is selected in SETUP.

If the print is very light or letters are not printing at all, check the ink cartridge or ribbon and replace if necessary. If you are using the Pentax PocketJet, check the small dial on the side of the printer. Normally a setting of 4-6 should be used (1 is for very light printing and 10 is for very dark printing). If you are using a printer using a cartridge, you should carry a spare as you will get very little warning when the cartridge goes dry.

APPENDIX A   STARTING SalesMate

The **SalesMate** program and dictionary files are typically stored in ROM (read only memory). A "FLASH Cable" and **FirstMate** running on an IBM Compatible Personal Computer are required to update the TELXON PTC-600. If you do not have a FLASH Cable or a Flash Box, the TELXON PTC-600 computer needs to be returned to TechMate International for updates.

SYSTEM DISPLAY "nn>" (69> or 99>)

These are the TELXON Computer's Operating System prompts. In unusual circumstances, the computer can exit SalesMate and return to the Computers Operating System and you will have one of these prompts displayed. To start SalesMate, go to either **STARTING SalesMate from "nn>"**.

If you press a wrong key from one of these prompts and get lost, pressing the [CLEAR] key repeatedly will eventually return you to the system prompt.

GETTING TO "nn>"

With SalesMate V7.4, you can get to the Telxon system display by entering Setup, and then move to the first prompt "Setup from FirstMate" (you may have to press the ! key to move back to this display). At "Setup from FirstMate"), press [YES] and you will actually exit SalesMate and go to a program that asks what program you want to run or if you want to download files from FirstMate. Pressing [NO] or ! will advance you through available choices. At the prompt to "Download files from FirstMate ?" you can return to the TELXON's System Display by pressing [END] and then [YES] to the prompt "Exit to TELXON system prompt?".

If you have installed SalesMate V7.2, you can get to the TELXON system display by pressing the [END] key until you are prompted "End SalesMate?" (four times from SalesMate's main menu). If you respond [YES] to the "End SalesMate?" prompt, you will exit SalesMate to the shell program described in the previous paragraph.

If you have not installed SalesMate V7.2 or later or the procedure above doesn't work for you, the following procedure can be used to return to the TELXON Computer's Operating System prompt. The number is the version number of the Computer's Operation System. It will be **62>**, **66>, 68>, 69>** or **99>**.

1.   Wait at least 5 seconds with the Computer OFF (if the Computer is ON, turn it off and wait 5 seconds). If the unit will not turn off, kill power by temporarily removing a battery (also remove battery charger if it is being used). **After replacing the batteries do not attempt to turn the TELXON PTC on but follow the following steps carefully**. You will need to use both hands.
2.   Depress the [ENTER] and [SP] keys at the same time and wait for at least 5 seconds.
3.   Continue to hold the [ENTER] and [SP] keys and now press the [ON/OFF] key and hold all three keys down for at least 5 seconds.
4.   Continue to hold the [ENTER] and [SP] keys and let up on the [ON/OFF] key and again wait at least 5 seconds.
5.   You can now let up on all keys and you should see **62>**, **66>, 68>, 69>** or **99>** on the display. **If you do not get one of these displays, start again at step 1.** If this procedure does not work, you should check your batteries.

INSTALLATION OF NEW RELEASES

Before a new release of SalesMate is installed, make sure that all customers that you want to save have been uploaded to FirstMate as they will be erased during installation of the new release.

A "FLASH Cable" or "FLASH Box", and **FirstMate** are required to install new releases. Instructions on how to install the update are sent with each release.

It is first necessary to get your TELXON PTC computer to the system prompt. Perform one of the procedures in the preceding section **GETTING TO "nn>"**.

The installation of a new release is done from FirstMate in two steps. The first step is to install the new version of SalesMate in ROM (Read Only Memory). The second step is to download printer drivers, tariffs, etc. into RAM (Random Access Memory). Following are the steps for installing a new release:

1. Left click on "Setup" on the FirstMate Main Window.
2. Left click on "Telxon" on the drop down menu.
3. Left click on the Programs tag. New releases are shown in the middle under the heading "ROM".
4. Select the new "ROM" version by left clicking on it (it will be highlighted).
5. Left click Download to start the download process.
6. Make sure you are using your "Flash Cable" or "Flash Box". Left click on OK and the download window will open.
7. The TELXON PTC should be at it's system prompt. At the system prompt press "SETUP" and hold for three (3) beeps and then [YES] four times. Downloading will start.
8. After downloading is complete, close the download Window.

You now need to complete installation by downloading necessary files: drivers, languages, tariffs, etc. Proceed to the next section.

INSTALLATION OF FILES – TARIFFS, LANGUAGES, ETC.

If you have SalesMate without Rating, it may not be necessary to download any additional files. Contact TechMate International for directions if you have any questions.

If you have SalesMate with Rating, installation of printer drivers, languages, tariffs, container rates and replacement valuation rates are done from FirstMate. Carriers and Agents that have been entered in FirstMate can also be downloaded to SalesMate.

If you are using SalesMate for Rating, Container Rates and Replacement Valuation Rates must be downloaded from FirstMate. To access these files, click on Container Files and Valuation Files from the Setup drop down menu in FirstMate.

Before files can be downloaded from FirstMate, you need to setup profiles in FirstMate. FirstMate has one default download profile. In addition, additional profiles can be setup for each user in FirstMate. Following is a summary of steps to setup a profile:

1. Left click on Setup on the FirstMate Main Window.
2. Left click on SalesMate from the Setup drop down menu.
3. First select the desired profile in the top left corner of the SalesMate Setup Window.
4. Then go to the Language, Carriers, Agents, Tariffs and Containers/Valuation tabs and select the desired files to download.

Following is a summary of steps for downloading files from FirstMate to SalesMate:

1. If you just installed a new version of SalesMate, you will be at the display "**Download Files from FirstMate ?**". If you are a prompt asking if you want to Start SalesMate or LoadMate, press [NO] or ! to advance to the prompt to Download Files from FirstMate.
2. If SalesMate is running, enter Setup, move to "Setup from FirstMate" and press [YES]. You should then be at the prompt "**Download Files from FirstMate?**".
3. When you are at the Download Files prompt, connect the TELXON PTC to the PC with your PC to TELXON cable. With FirstMate running, press [YES] on the TELXON PTC.
4. You will now be shown a Window with the default profile of files to download to SalesMate. To choose another profile, left click on the profile arrow. When the desired profile is shown, left click on Continue to download all of the files in the profile to SalesMate.

5. When downloading is complete, you will be at the prompt "Start SalesMate" on the TELXON. Press [YES] to start SalesMate.
6. If you want, you can download any Customers saved in FirstMate to SalesMate after installing a new release.

You can download files to SalesMate at any time without losing any information in SalesMate.

STARTING SalesMate from "nn>"

1. Press the 6 key at the "**nn>**" prompt one time and then the [ENTER] key repeatedly until you see the display of either **TechMate.Y** or **SaleMate.Y**. If you go past **SaleMate.Y**, you need to press the [CLEAR] key until you return to a **nn>** prompt and start over. TechMate.Y will only be present if additional features have been loaded during installation.

2. At a **TechMate.Y** or **SaleMate.Y** display, hold down the 3 key and allow the unit to beep three times and either TechMate or SalesMate will be started (let up on the 3 key). When you are prompted "**Start SalesMate Surveys?**", press [ENTER] and SalesMate will start.

SalesMate HUNG or LOCKED UP

If your TELXON Computer is hung with a display that will not change or it will not turn off, it is necessary to kill power and restart SalesMate. *__Before you proceed, make sure that none of the keys on your keypad are stuck in the down position as this will cause SalesMate to hang up__*.

To kill power, remove the battery door on the back of the unit and temporarily remove a battery. After putting the battery back in, the display should be blank. *__Do not attempt to turn your Computer ON at this time as data may be lost__*. Now go to **GETTING TO "nn>"** and follow the directions carefully starting with step 1.

APPENDIX B COMMON PROBLEMS

Question: The display on my TELXON PTC-600 has gotten so light I am having trouble reading it?

> The a and b keys are used to control the **CONTRAST** of the TELXON PTC-600's display while you are in SETUP. Enter SETUP and press the a and b keys until the display is optimized for your viewing.

Question: My computer has hung up. It will not respond to any keys and I can not turn it off. What do I do?

> First check to see if any of the keys are stuck in a down position. If this is not the case, it is very important that you attempt to restart your system exactly as directed as there is a slight chance that you can lose the data in your system. Go to Section B.2 GETTING TO "nn>" and carefully follow the steps for getting to the unit's system prompt and restarting SalesMate.