

# FIRST EDITION

Helping Publishers Fulfill Their Dreams

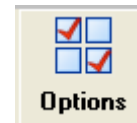
March 2010

## Track Changes for Better Customer Service

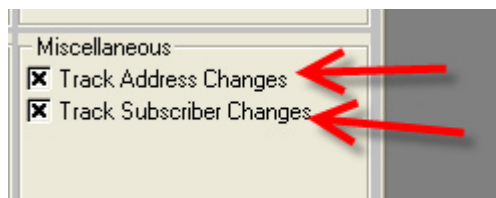
By Len Latimer

You may think that customer service is just for making occasional notes for customer service issues. But did you know customer service can automatically keep a record of changes to either or both of your subscription and customer records?

If you enter First Edition's Setup program and click this icon:



You'll then be able to setup the tracking.



Simply check one or both to enable tracking. Then you'll be able to see auto-entries in the Customer Service screen as you make changes like those shown here:

Customer Service			
Date	Batch	By	Comments
08/27/2009		LL	Payment change: 0.00 to 10.01
08/27/2009		LL	Check number change: 10.01 to 1234
08/27/2009		MR	Term change: 6 to 1
08/27/2009		MR	Startdate change: 0805 to 0804
08/27/2009		MR	Expiredate change: 0810 to 0804
08/27/2009		MR	RI change: 7 to 1
08/27/2009		MR	Check number change: 10.01 to (Blank)
08/27/2009		MR	Qualify date change: 08/27/2009 to 08/27/2020
08/27/2009		MR	Audit source change: (Blank) to B
08/27/2009		MR	Audit channel change: A to (Blank)
08/28/2009		MR	Edition Type change: P to E
12/08/2009		LL	These are my notes.
01/08/2010		LL	

That means when your subscriber calls, you'll have a complete record of changes to both his/her address and subscriptions. Knowledge is power, and tracking changes not only helps you help your customer, but understanding why addresses or subscriptions are not what you think they should be. You not only see the previous field setting, but also what it was changed to, along with the date and initials of the changer.

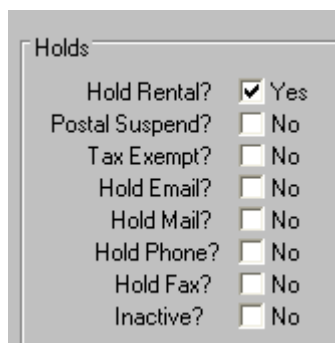
## Working with the Miscellaneous Tab

It's easy to forget there are other tabs on the First Edition transaction screen. One tab that is overlooked a lot is the Miscellaneous Tab that contains some very important information:

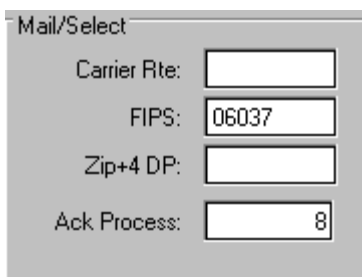


First off, this screen has all your Holds settings, which include Postal Suspend and Tax Exempt. Included in this area are Total Sales, Last Sales, and the Number of Sales to this customer, as well as a Follow Up Date and the Last Change Date to the customer.

Also overlooked are the Mail/Select settings usually brought in via CASS Certification or NCOA.

A screenshot of the 'Holds' settings panel. It contains a list of options with checkboxes:

- Hold Rental?  Yes
- Postal Suspend?  No
- Tax Exempt?  No
- Hold Email?  No
- Hold Mail?  No
- Hold Phone?  No
- Hold Fax?  No
- Inactive?  No

A screenshot of the 'Mail/Select' settings panel. It contains four input fields:

- Carrier Rte:
- FIPS:
- Zip+4 DP:
- Ack Process:

Carrier routes are useful for postal presorting. FIPS is a five digit code used by the federal government to identify counties, and ZIP+4 DP stands for the Delivery Point Bar code. This single digit is the MOD 10 of the zip code and zip+ code and is added after the zip code for printing Post Net barcodes. Some First Edition programs such as LynxForms calculates the Delivery Point Bar Code and will allow you to print a full Post Net Barcode on any form.

# Q & A with Dave

## Before I present this month's Q & A, I would like to share with you a few corrections that have been made to the latest version of First Edition:

- The Transaction report now has an option to select by Batch ID without having to specify a date.
- Selection by Postal Code in Global Changes has been corrected.
- Selection by Category in the Output program has been corrected.
- Premium Packages can now be deleted from Source Codes by selecting the blank entry in the drop down.

## And now, this month's Q & A's:

**Q**. My temporary employee entered last weeks' subscriptions into the wrong publication. What is the best way to remedy this situation?

A. I would suggest using Global Changes to delete the subscriber records (not customer records if the publications are shared, that way you don't have to re-enter names and addresses). Please refer to chapter 14 beginning on page 379 in the First Edition User's Guide for instructions on how to use Global Changes. Refer specifically to page 383 on deleting subscribers.

Note: Always backup all First Edition data prior to using Global Changes.

**Q**. I have several sets of CD's with old versions of First Edition and Post. I also have previous First Edition and Post applications archived on my server. Is there any reason to keep these?

A. Unless there is any possibility that you would want to access your data from several years ago, there is no reason to keep versions of First Edition and Post prior to Version 7.

**Q**. Our payment processing application requires "CC" to be exported as one of the fields in the credit card export file. Why won't the Transaction Type accommodate this requirement?

A. The Transaction Type is reserved primarily to denote the difference between a sale and a refund (see page 295, Chapter 11, Credit Card Processing in the First Edition User's Guide). Use the "Text field" to export a field containing an alpha-numeric character string as shown in this example:

Open Publication    Open POST    Open Export Format    Export Transactions

### Export Format

	Field	Start	Length	Format	Value
1	Transaction Type			@	C1,C4
2	Initials			@	
3	Subscriber ID			@	
4	Credit Card Number (customer)			@	
5	Credit Card Expire			MMYY	
6	Payment/Refund Amount			###.00	
7	Text			@	CC
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					

Field

- Tax Exempt
- Term
- Term in Months
- Term in Years
- Text
- Title
- Today's Date
- Total Price
- Transaction Type
- Type
- Unique Invoice
- User Field
- USPS Check Digit
- Vacation Start
- Write-Off
- Write-Off Amount
- Write-Off Date
- Zip

**Export Format**

Quote Comma Separated  
 Fixed Field  
 Quote Space Separated  
 Special Delimiter:

**Options**

Sort Field List Alphabetically  
 Delimit Header Record